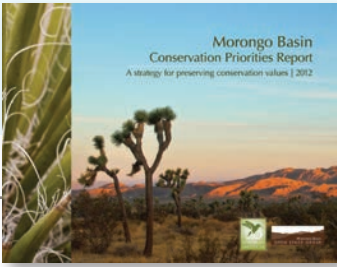




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# CONSERVATION IN A BROADER CONTEXT: LAND TRUSTS AND LAND USE PLANNING

BY OLE AMUNDSEN III & SUSAN CULP



The Morongo Basin spans 1,400 square miles in the Mojave Desert. In 2006, a planning partnership of local, state and federal entities from the government, business and community sectors formed the Morongo Basin Open Space Group and in 2008 undertook the Morongo Basin Conservation Priority Setting Project.

Land trusts are making great strides in strategic conservation planning, but conservation efforts do not occur in a vacuum. Even the most effective plans and implementation strategies can run into barriers within the broader context of land use management decisions by local governments and public land management agencies. Land trusts should consider participating more extensively in regional scale land use planning because 1) the outcomes of those planning processes can influence the success of long-range conservation efforts, 2) engagement at the regional scale can be a means of obtaining crucial buy-in for conservation goals from the broader community and 3) land trusts can add value to local and regional land use planning efforts.

Planning at a comprehensive, regional scale is optimal, especially for conservation goals that involve connectivity across a broad landscape, whether for wildlife corridors, scenic viewsheds or ecological integrity. So when a regional framework for land use discussions exists, land trusts can take advantage of that, ensuring that conservation values are adequately represented in regional visioning and planning.

But many communities do not have access to a regional-scale process. When this is the case, most land use decision-making occurs at the local government level, so land trusts should look to influence those local processes, and consider whether they might help stimulate a larger, regional-scale planning dialogue.

There are many opportunities for land trusts to engage with the land use planning process. Nearly all communities undergo periodic comprehensive land use planning and visioning, and more frequently engage in review of zoning ordinances or various elements of public land management plans that affect the community as a whole and its land uses.

### Different Approaches

Many local governments welcome the participation of land trusts in the planning process. Most planning staff are open to new ideas, input and information that can create more robust plans with greater public support. Land trusts can play a critical role in bringing new tools to the table, including detailed mapping of conservation values in the community and access to expertise and knowledge that might not otherwise be available in a comprehensive planning process.

Participation in these efforts can also further the goals of the land trust. Stephanie Weigel of the Sonoran Institute, who facilitated the strategic planning of the Morongo Basin Open Space Group in southeastern California, notes, "Some local governments may not recognize or value the conservation planning done by non-governmental organizations unless it is somehow captured in their own planning processes." Informing local land use planning efforts with conservation planning developed by land trusts can increase impact by ensuring that local land use plans incorporate a strong conservation element informed by land trust priorities.

Working within an existing plan can be quite helpful as well. Weigel says, "Most local governments have limited resources, so dovetailing conservation planning efforts in a manner that meets other requirements can be a win-win for both land trusts and the jurisdiction."

For land trusts to get the most out of engagement in land use planning, they must be clear about their goals and mission going into the process, and express those goals clearly and consistently throughout the process. This will help the land trust stay focused on its primary objectives in a context where multiple stakeholders with many ideas and issues will influence the process. Ensuring that there is sufficient staff time to fully participate throughout the length of a planning process can be

#### DEFINITION

*Strategic conservation is a process that produces tools to aid decision-makers in identifying, prioritizing, pursuing and protecting those specific tracts of land that will most effectively and efficiently achieve the land trust's mission.*



# CONSERVATION IN A BROADER CONTEXT



LAND TRUST FOR TENNESSEE

The Land Trust for Tennessee co-convended a public input session for the Nashville Open Space Plan held at Belmont University in Nashville, Tennessee, in 2010.

critical as well. As with any public process, outcomes are often defined by those who show up, and to ensure that your unique issues and perspectives are reflected in the final plan, it is important to allocate the time and resources necessary to see the process through.

While engaging in land use planning with local governments can produce many benefits, there can be significant challenges as well. When the Morongo Basin Open Space Group sought to include local government planning officials in their visioning efforts, they believed it was a strategically savvy thing to do. However, during their strategic planning, one representative of local government who participated and was supportive was replaced later in the process by another representative. Without any succession plan for coalition members to ensure continuity of support, the new local government representative created barriers to the success of the conservation goals of the land trust.

Another approach involves land trusts engaging with federal planning processes—either through a Bureau of Land Management Resource Management Plan process, or a Forest Service Plan through the U.S. Forest Service. Coordination with federal public land management agencies can ensure that the land trusts’

efforts have broader landscape-scale impact in meeting wildlife connectivity and ecosystem functionality goals. For federal agencies, the participation of land trusts can ensure that a strong voice for conservation exists in the public process.

## Land Trust as Convener

One of the most powerful roles land trusts can play in their communities is acting as conveners or facilitators of a planning process. In the absence of a strong regional-scale framework for land use and conservation planning, land trusts can take the initiative in catalyzing these important discussions. There are many approaches to how land trusts can orchestrate a planning process that reflects political considerations in their region, the capacity of the land trust and the complexity of the issues faced.

One avenue for land trusts is to act as an official co-convener of a traditional public planning process, such as developing an open space plan with a public agency. By partnering with a public agency, land trusts bring to the table their high credibility and public trust. In addition, the action-oriented reputation of land trusts inspires the public to believe that the recommendations generated in the public planning process will be acted upon.

In 2010 the Land Trust for Tennessee partnered with the City of Nashville to produce the city’s first open space plan. Funding for the project was provided by both partners, with the land trust portion coming from the Martin Foundation. According to Executive Director Jeanie Nelson, at first “the foundation was not fond of the idea of funding a plan, but as a land trust we are all about action, and due to our track record we were able to assure the foundation that this plan would not sit on the shelf.”

With a public process, land trusts need to be aware of added responsibilities, such as the potential need to follow a formal request for proposal (RFP) process for selecting consultants, public meeting and noticing laws and requirements and approvals from elected officials. In the Nashville public RFP process, The Conservation Fund was selected by a joint panel to help with the planning effort.

The Nashville Open Space Plan came at the right time. On May 1, 2010, 13 inches of rain fell on Nashville and the resulting flooding was some of the worst the city has ever experienced. By the time public meetings for the



Good planning for future growth will help Forterra keep the impact of housing to a minimum for prime farmland in Kittitas County, Washington.

ANNE WATANABE

open space plan were reconvened, residents were ready to talk about what they had experienced during the flood and how to make sure it never happened again. The final public meeting was held in the farmers' market in the fall, only a week after the market had reopened after the massive cleanup. By co-convening these meetings with the city, the Land Trust for Tennessee was able to reshape the agenda for conservation and future development, and have a major impact.

Another benefit to the Land Trust for Tennessee is that the resulting plan will be official government policy, making it easier to raise funds and coordinate conservation efforts with other municipal departments such as public works. "By collaborating with a public partner you gain more by letting go of a little control. You have to trust your partner," says Nelson.

Another method for land trusts to engage in planning is to act as the sole convener of a public planning process in places where government agencies are unable to discuss land conservation in a meaningful manner, or where the region might benefit from one organization taking a step back and asking the big picture questions, perhaps integrating plans at a regional or landscape level across jurisdictional boundaries.

Based in Indianapolis, the Central Indiana Land Trust's *Greening the Crossroads* plan creates a vision for conservation over a nine-county region. Some of the counties have comprehensive plans and even open space plans, but there had never been a vision for the whole region. With funding from the Nina Mason Pulliam Charitable Trust, Central Indiana Land Trust launched an ambitious planning effort that used ecological modeling and stakeholder input to guide The Conservation Fund in outlining a network of more than 300,000 acres of forests, wetlands and streams that are the backbone of the landscape of central Indiana.

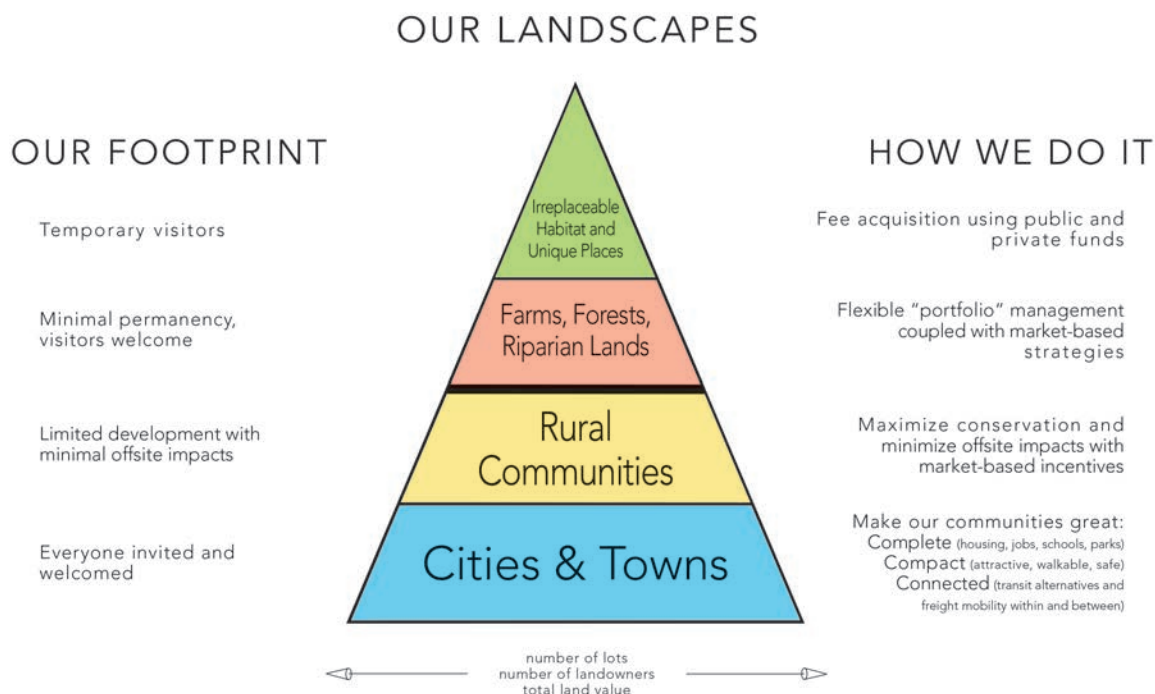
Cliff Chapman, conservation director for the Central Indiana Land Trust, says that "the amount of respect we are getting as a result of the plan is amazing. Because the plan is science-based we have a lot of acceptance of the plan and its priorities; people get it right away." The land trust has put an enormous amount of energy into reaching out to the community and working with government agencies on implementing the plan. Chapman observes, "Two years ago the Mayor of Indianapolis didn't know who we were. Now he has shown support for our plan before a crucial election." The land trust has collected a wide range of endorsement letters to build and demonstrate support.

#### TOP 4 TIPS ON LAND TRUSTS AND LAND USE PLANNING

1. Conduct internal strategic conservation planning and clarify land trust goals first.
2. Make land trust expertise and knowledge about regional conservation priorities known and available in a variety of planning contexts.
3. Host convenings and workshops early on to secure buy-in and commitment to conservation goals from the planning stakeholders.
4. Plan and prepare transitions and orient new stakeholders and coalition members to ensure continuity in the process.

# CONSERVATION IN A BROADER CONTEXT

## FORTERRA Agendas at a Glance



Property of FORTERRA, July 2012

Central Indiana Land Trust is actively working with county and city planners to incorporate *Greening the Crossroads* into comprehensive plans, open space plans, neighborhood plans, stormwater plans, stream buffers and tree protection ordinances. The land trust hosts an annual *Greening the Crossroads* meeting to keep the conversation about the plan going. Last year’s meeting focused on getting community planners to the table, and attendees can earn continuing education credits.

As with land acquisition, peers talking with peers is critical. “In our planning process and implementation we held extensive meetings with stakeholders and we are starting to get buy-in from folks we haven’t talked with. They simply heard about the plan from a peer in their network,” says Chapman.

### Long-Range Planning

The State of Washington is known nationally for its sophisticated public planning. In Seattle, Forterra (formerly known as the Cascade Land Conservancy) put forward the Cascade Agenda—a 100-year vision

for King, Kittitas, Pierce and Snohomish counties. The public in this region is well-versed in planning, so Forterra has had to be thoughtful in considering how and when to enter the public arena.

Skip Swenson, managing director of the Policy Department, thinks about it this way: “We have a sense of the issues we will get involved with and issues we will not. We have developed a series of rules of engagement that make us mindful of key issues and provide guidance on when we need to vet our participation in a planning process or take a stand on a public issue with our leadership. For us, it comes down to whether the issue has a mission benefit and whether it’s worth our time. There has to be some chance of influencing the outcome.”

Part of the Forterra strategy in implementing the Cascade Agenda is having an internal planning capacity that municipal and county governments can utilize for addressing tough problems. One of the most satisfying experiences for Swenson in the implementation of the agenda was working with Kittitas County, a rural county on the eastern side of the Cascades range, to adopt



a Transfer of Development Rights (TDR) program. TDRs are complex tools that allow a landowner to sell development rights from a “sending” region—usually an ecologically sensitive area—to another landowner with a need to increase density in a “receiving” region—usually a more developed area. TDR tools are often used in densely populated regions and require considerable public support and technical expertise to implement. The fact that a land trust was able to help a rural community utilize TDR is a powerful example of the game-changing role land trusts can play in their communities.

### Internal Planning

In any planning process, land trusts should craft internal strategic conservation plans that guide the land trust but do not formally involve the public. Getting staff and board members on the same page in terms of organizational values is important. It’s also an opportunity to learn about the community that land trusts serve, and to explore whether the organization can help the community in new ways.

In 2007, the Genesee Land Trust in Rochester, New York, received a capacity-building grant from the Land Trust Alliance through the New York Environmental Protection Fund’s New York State Conservation Partnership Program to work with a team of graduate students at Cornell University’s Department of City and Regional Planning on a conservation plan for the two counties along Lake Ontario. “The plan was important for us to focus our efforts and help us explain what we do and why it’s important to the community,” says Executive Director Gay Mills.

Through the planning process, board members learned about their region in detail. As Mills observes, “Board members learned a lot about our region and it made them better listeners when staff would bring ideas forward. For example, many board members knew that farmland was threatened, but the plan helped them understand that our farmland soils are some of the most productive in the country.”

Planning makes sense for land trusts in a number of ways, especially if the land trust is preparing for accreditation. While planning is not required for accreditation, it does help motivate the land trust to develop key policies. According to Mills, “The plan really helped prepare our land trust, and the information we collected and refined in the planning process helped answer many of the accreditation questions. Since the plan helped us



NIGEL P. KENT

focus, we had structured many of our documents and policies around our planning priorities.”

### Using the Tools

Land trusts are making their communities stronger by participating at an appropriate level in land use planning. The examples above illustrate how important the coordination of planning at multiple levels is for achieving the conservation goals of land trusts. We can benefit from the lesson learned by the Morongo Basin Open Space Group on how to prepare for continuity. From the Land Trust for Tennessee and the Central Indiana Land Trust, we learn how conservation can have a much broader and significant impact when coordinated over multiple jurisdictions or when it is integrated with local government planning. Forterra’s experience shows that land trust leadership in planning, if done in a respectful way, can be welcomed by communities. Finally, planning can help land trusts connect to new audiences as shown by Genesee Land Trust. It’s an exciting time for conservation. Let’s use all the tools and approaches we can to help our communities reach their full potential. 🌱

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**Genesee Land Trust’s North Coast Initiative aims to create a two-mile buffer of protection along Lake Ontario. Shown is Salmon Creek Preserve at Braddock Bay, part of a large wetland complex extending through the towns of Parma and Greece into the lake. This is nesting habitat for the endangered Black Tern.**

Go to [www.lta.org/savingland](http://www.lta.org/savingland) to see an accompanying list of books and articles on planning.