



# CONFERENCE PROGRAM AND REGISTRATION

IN PARTNERSHIP WITH THE ONTARIO LAND TRUST ALLIANCE



Rock Dunder - RWLT

## CANADIAN LAND TRUST ANNUAL CONFERENCE

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KINGSTON, ONTARIO

SEPTEMBER 21 - SEPTEMBER 23, 2011

## WELCOME

The Canadian Land Trust Alliance is proud to join with our partner group, the Ontario Land Trust Alliance, to welcome delegates from the land trust movement to the 2011 Canadian Land Trust Conference. Delegates will enjoy southeastern Ontario hospitality over three days of learning, networking, and camaraderie in Kingston, Ontario.



A special thank-you to the Ontario Land Trust Alliance  
Our partner organization for the 2011 conference.

### **2011 PLANNING COMMITTEE:**

**Michelle Albanese**, *Orland Conservation*  
**Tanna Elliott**, *Ontario Land Trust Alliance*  
**Burke Korol**, *Environment Canada, Ontario Region*  
**Ian Macnab**, *Ontario Land Trust Alliance*  
**Lynn McIntyre**, *Canadian Land Trust Alliance*  
**Angus McLeod**, *Canadian Land Trust Alliance*  
**Dave Walker**, *Rideau Waterway Land Trust*

### **CANADIAN LAND TRUST ALLIANCE BOARD OF DIRECTORS**

**Margo Sheppard**, *Chair, Atlantic Canada*  
**Gary Goodwin**, *Vice-Chair, Ducks Unlimited Canada*  
**Karen J. Cooper**, *Secretary, Carters Professional Corp.*  
**Linda Hurdle**, *Treasurer, Hurdle Consulting*  
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**Tim Sopuck**, *Manitoba*  
**Sue Michalsky**, *Saskatchewan*  
**Margaret Van de Pitt**, *Alberta*  
**Ben van Drimmelen**, *British Columbia*  
**Lisa McLaughlin**, *Nature Conservancy of Canada*  
**James J. Espy, Jr.**, *Sewell Foundation*  
**Thea Silver**, *Scientists in Schools*

# CANADIAN LAND TRUST CONFERENCE 2011

## HELP MAKE THIS CONFERENCE CARBON NEUTRAL!

The CLTA and OLTA have teamed up with Trees in Trust and the Radisson Harbourfront Hotel to ensure that we will offset 100% of our climate impact. The Radisson Harbourfront Hotel has worked with us to do their part in reducing the carbon footprint of their facilities and services for this conference. However, we cannot completely eliminate our carbon footprint, especially when we factor in travel. By working with Trees in Trust we can offset this remaining carbon footprint. We are asking each delegate to contribute \$8 to make this happen. Trees in Trust, a Canadian organization and CLTA Supporter, will invest this money in CLTA member land trust projects that will lead to permanent preservation of mature forest lands. Let's lead by example and each contribute \$8 to have a truly carbon neutral conference. All those who contribute will be recognized in the Conference Program.



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## PRE-CONFERENCE ACTIVITIES

### PRE-CONFERENCE SEMINARS

#### **WEDNESDAY, SEPTEMBER 21**

**SEMINAR 1** Cost \$90.00 Time: 9:00 am to 4:15 pm

#### **EVERYTHING YOU WANT TO KNOW ABOUT CONSERVATION EASEMENTS**

**PRESENTERS:** *Michelle Albanese, Renny Grilz, Marc Kemerer, Burke Korol, Lisa McLaughlin, Jack Miller, Paul Peterson*

Many land trusts are using conservation easements as a tool for conserving land. The Canadian and Ontario Land Trust Alliances have assembled a group of experienced practitioners from across Canada to guide you through all aspects of deciding when to use a conservation easement, the steps required to craft an easement that will protect the conservation values identified and monitoring of easements to ensure the obligations of both the landowner and the land trust are being met. This interactive workshop is both for the beginner and the more advanced land securement practitioner as it will cover the basics as well as more complex issues like recordkeeping, amendments and violations. This workshop will be chaired by Marc Kemerer, an Ontario based lawyer who is very experienced in natural and cultural heritage easements. Paul Peterson, another experienced conservation lawyer from Ontario will also be assisting the workshop. Our panel of experts in this field will discuss Canadian Case Law, appraising conservation easements, Baseline Documentation Reports (BDRs), the Ecological Gifts Program (with a representative from the EGP), and calculating and fundraising for the long term costs of maintaining easements. We will also be conducting a special "ask the expert" session at the end of the workshop. This will give participants an opportunity to ask questions about their current or future conservation easements. This workshop is for volunteers, land trust staff, lawyers and land use planners and promises to be informative and thought provoking.

# PRE-CONFERENCE ACTIVITIES

## PRE-CONFERENCE SEMINARS

**WEDNESDAY, SEPTEMBER 21**

**SEMINAR 2** Cost \$90.00 Time: 9:00 am to 4:15 pm

**HUMAN RESOURCES AND WHAT EVERY MEMBER NEEDS TO KNOW— FROM AN ALL VOLUNTEER TO A FULLY STAFFED ORGANIZATION**

**PRESENTERS:** *Marc Smiley, Scott Stephen and Wanda Stephen*



### **Part A:**

Within any organization, there are consistent roles that must be filled. From raising the money to managing the land, groups need to have boots on the ground and all hands on deck. As an organization moves from a small start-up to larger, professionally staffed group, some of these roles can change hands, while others can be rooted in their original governance function. This workshop will explore all the roles of governance and management, and how volunteers of all stripes – from board members to active program volunteers – and professional staff can work together to make the most of the team effort. It will clarify roles and responsibilities, lines of authority, and provide tools that can help everyone within the organization be more productive and have a better sense of satisfaction about their involvement.

### **Part B:**

Not only is it good practice to incorporate good policies in hiring and managing employees but land trusts' Board of Directors and senior staff have responsibilities under relevant provincial law. Don't put yourself or your organization at financial risk. This interactive session will discuss topics related to the Ontario Employment Standards Act and Ontario Occupational Health and Safety Act. When is an employee considered a contract worker or an employee, as a Board member or manager of employees what are my obligations regarding hours of work, vacation time, benefits, termination or providing a safe working environment including my obligations to provide safety equipment. This session will be thought provoking and is a must for all directors and management personnel within the land trust movement.

## FIELD TRIP 1 - WEDNESDAY, SEPTEMBER 21

### **Hiking, History and Education**

**Cost \$ 90.00 Time: 9:30 am - 4:30 pm**

*Hosted by the Rideau Waterway Land Trust, Parks Canada, Nature Conservancy of Canada and Queens University Biology Station*

Spend a day in the Frontenac Arch Biosphere Reserve. You will board your highway coach at the hotel and head north. First stop will be Rock Dunder. This is a signature property of the Rideau Waterway Land Trust and you will hike the trails leading to one of the highest lookouts in Eastern Ontario. In addition to being an ANSI and habitat for Species at Risk, the property has 7 km of trails and is visited by over 5,000 people annually who come to marvel its natural heritage and fall colours. Next we will travel 5 km and tour Jones Falls, one of the Rideau Canal's largest lock stations and home to a working blacksmiths shop, fortifications dating from 1832 and, at the time of its construction, the largest stone dam in the British Empire. Parks Canada interpreters will lead the tour of this World Heritage Site. Following lunch we will travel to Nature Conservancy's Elbow Lake property. This 1100 acre site, formerly a Hewlett Packard employee recreation site, is now managed by a partnership between NCC and Queen's University with Queen's delivering outreach and community education programs to high school students and residents of the area. The trip ends with a 40 minute coach ride back to Kingston.

## PRE-CONFERENCE ACTIVITIES

### **FIELD TRIP 2 - WEDNESDAY, SEPTEMBER 21**

#### **Eco-island cruise: Snake and Salmon Islands, Amherst Island, Cedar Island.**

**Cost \$ 90.00 Time: 9:30 am - 4:30 pm**

*Hosted by: Land Conservancy for Kingston, Frontenac, Lennox and Addington, in partnership with St. Lawrence Islands National Park, Parks Canada; Kingston Field Naturalists.*

Take an eco-island cruise. Explore protected islands and waterfront properties where Lake Ontario leads into the St. Lawrence River. For this adventure, we will leave by boat from downtown Kingston at 9:30 a.m. and travel west to view Snake and Salmon Islands. These small islands were recently donated to the Land Conservancy for Kingston, Frontenac, Lennox and Addington. The colonial waterbirds that nest there have been the subject of Canadian Wildlife Service research for many years. We'll then head to the much larger Amherst Island for a visit to the eastern tip where the Kingston Field Naturalists own a property. That's our lunch stop and a chance to do some bird -watching. After the provided lunch, we'll head back towards Kingston and a visit to Cedar Island, part of St. Lawrence Islands National Park, with walking trails and a great perspective on the western edge of the 1000 Islands. After a snack and time to explore, we'll head back to Kingston harbour for 4:30. Knowledgeable guides will provide information about the plants and animals that thrive here or migrate through.

Parks Canada is providing the boats. Lifejackets are mandatory, and will be provided. Please bring your own personal flotation device if you prefer that to the classic safe but bulky government-issue lifejacket. This field trip is weather dependent. Please bring rain gear as a shower will not stop us. Should there be stormy weather, we will go to Amherst Island by bus, and view the islands and water from the safety of the shore.



## CONFERENCE SPECIAL EVENTS

### **OPENING RECEPTION**

*Wednesday, September 21– 7:00 pm to 9:45 pm  
Sydenham Street United Church*

Join us at Sydenham Street United Church beginning at 7 pm for the Opening Reception to meet old friends and make new ones. The reception will be hosted by our supporting sponsors, the three Kingston and area land trusts. The reception is followed by An Evening With Sarah Harmer, a concert by this Juno Award winner and noted land conservationist. Our sponsors have invited Kingston and area residents to come and join us for the evening. This evening is not to be missed and it is your opportunity to show the community your enthusiasm for land conservation. Tickets for this special evening are \$30 each and can be purchased when you register for the conference.

### **GALA DINNER AND AUCTION**

*Thursday, September 22, 2011- Reception: 6:00 pm - 7:00 pm, Dinner and Auction: 7:00 pm to 9:30 pm  
Harbour Shadows Room*

Join us for an evening to remember. Under the direction of noted Chef Clark Day, the chefs at the Radisson have created a menu of local delicacies to highlight the abundance of local foods from the Kingston region. There are three menu selections, something for everyone. Join us in the Harbour Shadows Room, recognized as the best dining room view in Kingston, when we will enjoy a meal of local foods prepared by a team of chefs that are recommended by "Where to Eat in Canada". Tickets for this extraordinary evening are \$40 each and can be purchased when you register for the conference. Vegetarian options are available.

## KEYNOTE SPEAKER - OPENING PLENARY

### PETER WELLES- OPENING PLENARY



Peter will lead a discussion on "Resources for the Future of Conservation". He'll share some of his experience from personally having secured millions of dollars from individual, corporate, and foundation donors over the last 20 years. Having been an integral part in over \$1.5 billion in capital campaigns for conservation organizations, he'll draw both on personal stories from major conservation supporters, as well as "the data" on what motivates environmental givers. Come prepared to share your own stories about how we can collectively secure the resources for the future of conservation in Canada!

### EXHIBIT OPPORTUNITIES

The Canadian Land Trust Conference is offering you the opportunity to:

- Showcase your services, products, successes and stories to a targeted audience.
- Heighten your organization's name and brand recognition within the conservation community.
- Make valuable personal contacts and strengthen existing relationships.
- Deliver your message at a cost-effective value: \$200 for 8' X 6' exhibit space and a special rate of \$50 for a 6'skirted table for CLTA /OLTA land trust members.

All exhibits will be located in the Harbour Shadows Room and foyer at the Radisson Hotel Kingston Harbourfront.

**Limited exhibit space is available on a first-come, first-serve basis. Email Dave Walker at [davew@rwl.org](mailto:davew@rwl.org) or call 613-284-2010 for more information.**



City Hall, Kingston, Ontario

## SCHEDULE AT A GLANCE

### ***WEDNESDAY, SEPTEMBER 21***

7:30 am - 9:30 am	Registration Desk Open– Harbour Shadows foyer 6th Floor
7:00 am - 8:30 am	Breakfast for Seminar and Field Trip Registrants– Harbour Shadows Room
9:00 am - 4:15 pm	Pre-Conference Seminars
8:00 am - 5:00 pm	Field Trip #1
9:30 am - 4:30 pm	Field Trip #2
7:00 pm - 10:00 pm	Opening Reception: An Evening with Sarah Harmer– Sydenham Street United Church
Dinner on your own.	

### ***THURSDAY, SEPTEMBER 22***

7:30 am - 8:30 am	Breakfast - Harbour Shadows Room
7:30 am - 9:00 am	Registration Desk Open - Harbour Shadows foyer 6th Floor
9:00 am - 10:20 am	Opening Plenary - Presenter: Peter Welles - Harbour Shadows Room
10:20 am - 10:40 am	Nutrition Break
10:40 am -12:00 pm	Concurrent Workshops: Session 1
12:00 pm - 1:30 pm	Lunch - Harbour Shadows Room
1:30 pm - 2:50 pm	Concurrent Workshops: Session 2
2:50 pm - 3:10 pm	Nutrition Break
3:10 pm - 4:30 pm	Concurrent Workshops: Session 3
6:00 pm - 9:30 pm	Reception, Gala Dinner and Auction - Harbour Shadows Room

### ***FRIDAY, SEPTEMBER 23***

7:00 am - 7:45 am	Breakfast with Bob Rae - Harbour Shadows Room
7:30 am - 9:00 am	Registration Desk Open - Harbour Shadows Foyer 6th Floor
7:45 am - 8:45 am	Funder’s Forum - Harbour Shadows room
9:00 am - 10:20 am	Concurrent Workshops: Session 4
10:20 am - 10:40 am	Nutrition Break
10:40 am -12:00 pm	Concurrent Workshops: Session 5
12:00 pm - 1:30 pm	Lunch - Harbour Shadows Room
1:30 pm - 2:50 pm	Concurrent Workshops: Session 6
2:50 pm - 3:10 pm	Nutrition Break
3:10 pm - 4:30 pm	Concurrent Workshops: Session 7

## CONCURRENT WORKSHOPS AT A GLANCE

THURSDAY, SEPTEMBER 22

Enrich your mind and engage your curiosity in our selection of 27 inspiring workshops by some of North America's top leaders in conservation. These workshops are included in the basic registration fee. You can create your own unique conference experience.

For full workshop descriptions, see pages (10-15).

	Session 1: 10:40 am - 12:00 pm	Session 2: 1:30 pm - 2:50 pm	Session 3: 3:10 pm - 4:30 pm
<b>Stream A</b> Board Member Bootcamp	<b>1A</b> Strategic Planning <i>Marc Smiley</i>	<b>2A</b> Developing a Fundraising Plan <i>Marc Smiley</i>	<b>3A</b> Board Development and Recruitment <i>Marc Smiley</i>
<b>Stream B</b> Land Securement and Management	<b>1B</b> Developing Your Land Securement Strategy <i>Robert Orland</i>	<b>2B</b> Engaging Partners to Design Natural Heritage Systems, <i>Mike Hendren, Chris Lemieux, Dave Walker, Liz Spand and Silvia Strobl</i>	<b>3B</b> The Planning Process in Ontario, Pro- vincial and Municipal Interaction <i>Murray Beckel, Dan Ethier</i>
<b>Stream C</b> The Business of Running a Land Trust	<b>1C</b> Partnering with Corporations - Sponsorship Opportunities <i>Lea Parrell</i>	<b>2C</b> Making the Connection Between Communi- cations and Fundraising <i>Helen Deboer-Daggett</i>	<b>3C</b> Recent Changes in Tax Law <i>Karen Cooper</i>
<b>Stream D</b> Emerging Trends	<b>1D</b> Recent Federal and Ontario Corporate Law Changes and How they Affect your Land Trust <i>Karen Cooper</i>	<b>2D</b> Working with Youth and Minorities in Your Community <i>Victor Reyes</i>	<b>3D</b> Social Marketing Strategies <i>Kathryn Ross</i>

Enrich your mind and engage your curiosity in our selection of 27 inspiring workshops by some of North America's top leaders in conservation. These workshops are included in the basic registration fee. You can create your own unique conference experience.

For full workshop descriptions, see pages (10-15).

	Session 4: 9:00 am - 10:20 am	Session 5: 10:40 am -12:00 pm	Session 6: 1:30 pm - 2:50 pm	Session 7: 3:10 pm - 4:30 pm
<b>Stream A</b> Board Member Bootcamp	<b>4A</b> Creating a Culture of Respect Between Board and Staff <i>Peter Welles, Tanna Elliott</i>	<b>5A</b> Conflict of Interest and the Board's Fiduciary Duties <i>Ken Goodman</i>	<b>6A</b> Budgeting and Good Financial Management <i>Linda Hurdle</i>	<b>7A</b> Incorporating Staff into an All Volunteer Land Trust <i>Ron Reid, Mark Bissett</i>
<b>Stream B</b> Land Securement and Management	<b>4B</b> Understanding Valuation and It's Role in the Conservation Process <i>Nigel Turner, Rick Escott</i>	<b>5B</b> Tax Incentives, Risk Management and the Conservation of Ecologically Sensitive Lands: Ecological Gifts <i>Burke Korol</i>	<b>6B</b> Creative Land Securement Case Studies <i>Robert Orland</i>	<b>7B</b> Developing Land Management Plans with Lessons from the Field <i>Lisa McLaughlin</i>
<b>Stream C</b> The Business of Running a Land Trust	<b>4C</b> Engaging the Community <i>Couchiching Conservancy</i>	<b>5C</b> Experiences Learned AYO <i>Jen Baker, Kristie Virgoe</i>		<b>7C</b> American Friends of Canadian Land Trusts: New Opportunities <i>Konrad Liegel, Stefan Nagel, Bonnie Sutherland</i>
<b>Stream D</b> Emerging Trends	<b>4D</b> How to Engage Elected Officials <i>Frank Kinsella, Bob Rae</i>	<b>5D</b> Conservation Easements - How They Affect Market Value of Adjoining Properties <i>Chad Lawley</i>	<b>6D</b> Advanced Planned Giving Tools <i>Richard Elsmore</i>	<b>7D</b> Building Partnerships with Local Government <i>Michelle Albanese, Janet Wong</i>

# WORKSHOP DESCRIPTIONS – THURSDAY, SEPTEMBER 22

## 10:40 AM - 12:00 PM

### **1A - STRATEGIC PLANNING**

This session will provide an overview of how strategic planning can literally strengthen every facet of the organization. It will define roles in planning, the steps in the process, and the ways to modify the scope of the planning process to fit the time and resources available to the organization. Marc Smiley, Principal with Solid Ground Consulting Group, will lead this workshop. Marc has been a consultant throughout North America for more than 20 years, specializing in organizational development, strategic planning, sustainable leadership, and funding strategy.

### **1B - DEVELOPING YOUR LAND SECUREMENT STRATEGY**

Robert Orland, President of Orland Conservation, has more than 23 years experience in land and water conservation, and will be leading this workshop. Many land trusts have identified the need to secure more land in order to protect the environmental integrity of their watersheds. Before you act, make sure you have a well thought out land securement strategy. This presentation will discuss the importance of developing a land securement strategy and outline key components including securement tools and their benefits, alternatives to securement, securement criteria and priorities, evaluating properties, funding partnerships and landowner contact.

### **1C - PARTNERING WITH CORPORATIONS - SPONSORSHIP OPPORTUNITIES**

Known throughout the industry as an "opportunity broker," Lea Parrell brings over 25 years of diverse experience in every area of marketing and is the President of Harmony Marketing. Lea's presentation will help you discover the unique differences between donations versus corporate partnerships/sponsorships including: how to ascertain if you have the benefits to solicit sponsorship dollars; determining tangible and intangible dividends; market value assessments; and creating target lists and sales materials.

### **1D - RECENT FEDERAL AND ONTARIO CORPORATE LAW CHANGES AND HOW THEY AFFECT YOUR LAND TRUST**

Presenter Karen Cooper is a lawyer with Carter's Professional Corporation practicing in Charity and Not-for-Profit Law, Tax Planning and Litigation. Karen is also a sessional lecturer at Carleton University School of Business, the Ontario Institute of Chartered Accountants and a part-time professor at the University of Ottawa. Karen will discuss how the corporate law regime governing both federal and Ontario

corporations is changing and land trusts incorporated under either regime will be required to transition to the new rules in the very near future. This session will provide an overview of the new Canada Not-for-profit Corporations Act, the new Ontario Not-for-Profit Corporations Act, and what is required to transition under both. This presentation will provide details about land trusts' obligations to maintain a compliant corporation under the new Acts and choices and options to be considered in preparing the transition documents.

## 1:30 PM - 2:50 PM

### **2A - DEVELOPING A FUNDRAISING PLAN**

The "build it and they will come" mentality really doesn't work. To raise the money needed to fuel your plans, groups need to be clear about what revenue sources make sense, and what steps are needed to make the revenue come in. This workshop, presented by Marc Smiley, Principal with Solid Ground Consulting Group, will help groups understand the types of revenue that make sense, and to organize that revenue in a way that is most suitable for your needs. Most importantly, it will provide very real ideas for making the promise of revenue real with specific information about how to raise money to support the Fundraising Plan.

### **2B - ENGAGING LOCAL PARTNERS TO DESIGN NATURAL HERITAGE SYSTEMS TO SUPPORT STRATEGIC LAND SECUREMENT**

Increasingly, government agencies and non-government organizations are collaborating to incorporate communities in decision making. As a result, the use of only expert-based consultation is being replaced by dialogue-based stakeholder engagement. The Ontario Ministry of Natural Resources' collaborative process for identifying natural heritage systems (NHS) in regional landscapes demonstrates this new model by bringing together a diverse group of stakeholders. The stakeholders set targets for natural areas and features on their landscape and map an NHS with the assistance of a decision support tool and the advice of experts in environmental science. The map and associated information support land securement by identifying those areas that contribute the most to conservation targets. This interactive session will lead participants through the engagement process, share the experiences of both the "Sustaining What We Value" and Leeds Grenville Counties NHS projects, and demonstrates how the process can support Land Trust business. Presenters include: Mike Hendren (Kawartha Heritage Conservancy), Dave Walker (Rideau Waterway Land Trust), Chris Lemieux (Ministry of Natural Resources (MNR)), Liz Spang (MNR), and Silvia Strobl (MNR).

# WORKSHOP DESCRIPTIONS – THURSDAY, SEPTEMBER 22

## **2C - MAKING THE CONNECTION BETWEEN COMMUNICATIONS AND FUNDRAISING**

Over the past 12 years, Helen DeBoer-Daggett has worked in fundraising shops with a staff of 1 to 31. As an active volunteer and instructor, Helen is a faculty member with the Canadian Association of Gift Planners, and she is heading up the Mentoring Program with the Association of Fundraising Professionals (AFP) Golden Horseshoe Chapter. Too often we receive a gift from a donor, never to hear from them again. These are lost opportunities and the answer is better communications. Join Helen in this interactive workshop and discuss effective communication ideas that will help you and your volunteers build stronger relationships with your donors while applying basic fundraising principles to advance your cause.

## **2D - WORKING WITH YOUTH AND MINORITIES IN YOUR COMMUNITY**

Victor Reyes, Project Manager at Sustainability Network and leader of the organization's Environment and Diversity Project, will lead this workshop. Environmental nonprofit organizations know that the Canadian population is changing and will continue to change; they realize that if they want to make a difference, they need to start responding to the nuances, needs and wants of the communities they want to engage in their work, and to reflect those communities at all levels inside their organizations. In particular, tapping into the energy, knowledge and perspectives of ethno-cultural groups, Aboriginal communities and youth will be key to helping organizations fulfill their missions – now and in the future. This presentation will highlight programs being implemented by the Sustainability Network that offer strategies for tangible and positive environmental change resulting from a diverse and inclusive conservation movement. The presenter will also facilitate an open discussion on how engaging ethno-cultural groups, Aboriginal communities and youth can help Land Trusts more effectively pursue their mission.



**Jones Falls Lock Station**

**3:10 PM– 4:30 PM**

## **3A - BOARD DEVELOPMENT AND RECRUITMENT**

Asking people for their time is perhaps a more precious request than asking them for their money. But the truth is that for every group to succeed, it must have great people involved. If this step is successful, every other part of the organization can be successful. If not, everything else is hard. Marc Smiley, Principal with Solid Ground Consulting Group, will discuss how recruiting is the first – and most important – of five steps in board development. This session will focus on all five steps, with a major emphasis on recruiting.

## **3B - THE PLANNING PROCESS IN ONTARIO, PROVINCIAL AND MUNICIPAL INTERACTION**

Join us in a discussion of how land use planning interrelates with initiatives undertaken by Land Trusts in the conservation of lands in Ontario. This session will provide an overview of the planning framework in Ontario, highlight key natural provincial interests, and outline how provincial and municipal planners work with decision-makers to protect lands containing valuable natural features in land use decisions. This session shall also describe some of the tools available to municipalities and stakeholders to assist in the preservation of Ontario's natural heritage. This workshop is lead by Dan Ethier, a planner with the Ministry of Municipal Affairs and Housing and liason with municipal planners throughout Eastern Ontario and Murray Beckel, planner for Loyalist Township located immediately west of the City of Kingston.

## **3C - RECENT CHANGES TO TAX LAWS**

This session will bring you up to date regarding your responsibilities in meeting the provisions of the Income Tax Act as they affect your land trust. Karen Cooper, a lawyer with Carter's Professional Corporation practicing in Charity and Not-for-Profit Law, Tax Planning and Litigation, will discuss new governance requirements, changes for endowments for stewardship funds, and other tax changes affecting land trusts. This is a must do workshop for board members, accountants, lawyers, fundraisers and executive directors of land trusts.

## **3D - SOCIAL MEDIA STRATEGIES**

Kathryn Ross, Communications Officer of the Ontario Land Trust Alliance, leads this workshop. During this session, you will explore new social media strategies and the tools you will need for success in the online world. From creating compelling content to learning the basics of social networking sites, there's something for everyone.

# WORKSHOP DESCRIPTIONS – FRIDAY, SEPTEMBER 23



**City Hall, Kingston, Ontario**

**9:00 AM - 10:20 AM**

#### **4A - CREATING A CULTURE OF RESPECT BETWEEN BOARD AND STAFF**

Micromanaging, organizational behaviour and culture, how does all of this create a good or not a so good working environment? The relationship between the board and staff requires careful parameters, a clear understanding of roles and responsibilities, and open communication. Knowing and understanding these things will help you set up a good working relations between your board and staff. Tanna Elliott, Executive Director and Peter Welles, President of the Kensington Conservancy have developed a good staff/board relationship and will discuss their experiences over the past five years.

#### **4B - UNDERSTANDING VALUATION AND ITS ROLE IN THE CONSERVATION PROCESS**

Richard J. Escott, Vice President of Turner Drake, and Nigel G. Turner, Manager of Turner Drake, lead this workshop on the valuation process. The role of the valuation consultant is often misunderstood and underutilised. Valuations are an integral part of the conservation process and represent a significant portion of a conservation group's budget. This workshop will take you through the valuation process to shed some light on the techniques used in valuing property. It will explore conservation easements and their impact on the value of property. The workshop will also show how conservation easements are valued using the "before and after" approach; together with breaking out the various land components including base land rates and waterfront benefit. Valuations prepared to Ecogift and IRS Standards will also be discussed together with ways to work with your valuation consultant to save your organisation time, money and headaches. Discussion on the challenges that valuation consultants face when

valuing conservation lands will also be touched upon. By the end of the workshop attendees will have a much clearer understanding of the valuation process and ways to streamline and incorporate the expertise of the valuation consultant within their organization.

#### **4C - ENGAGING THE COMMUNITY**

The Couchiching Conservancy has over 18 years of experience in public awareness and promotion of its conservation projects. Most of this success has come about through the tireless and dedicated efforts of its board of directors and key volunteers. Despite the challenge—a smaller community with finite resources and few larger funders, the Conservancy successfully turned it into an opportunity to connect with the community on a personal level. In 2008, The Couchiching Conservancy was the recipient of the inaugural Community Engagement Award. The Orillia based land trust was recognized for its accomplishments including, community workshops involving a wide variety of stakeholders, media partnerships, and the financial support of local businesses. This workshop will demonstrate how to engage your local community and create long-lasting and successful partnerships. Workshop presenters TBA.

#### **4D - HOW TO ENGAGE ELECTED OFFICIALS**

Frank Kinsella, with 16 years of elected municipal experience and Mayor of Leeds and Thousand Island Township from 2006 – 2010, and Bob Rae, who has had a distinguished career in provincial and federal politics first elected as an MP in 1978, before moving to provincial politics where he served as Ontario's 21<sup>st</sup> premier and now back in Ottawa as the MP for Toronto Centre and the interim leader of the Liberal Party of Canada will lead this workshop and give insights into the process to successfully engage your elected officials. This moderated and interactive workshop will talk about the challenges faced by elected officials and their staff in setting priorities and responding to the many enquiries they receive from their constituents. Come learn how to get the attention of your elected officials and what information they need, and don't need, to help you reach your objectives. All registered delegates for this workshop will be contacted and invited to submit questions before hand. This is your opportunity to learn from two very experienced politicians on what works and what doesn't work in delivering a successful government relations program.



**Kingston, City of Churches**

# WORKSHOP DESCRIPTIONS – FRIDAY, SEPTEMBER 23

**10:40 AM - 12:00 PM**

## **5A - CONFLICT OF INTEREST AND THE BOARD'S FIDUCIARY DUTIES**

All Board members of a corporation have fiduciary duties but for Directors of charitable corporations these duties are particularly important. Directors of charities in all parts of Canada need to be aware not only of the obligations established in the Income Tax Act but also of the law of trusts and the obligations of fiduciaries when handling charitable property. This session will examine obligations both under the Income and trust law; the source of these obligations and a discussion of specific fiduciary duties including conflict of interest and the duty to use the charities property to further the charitable purposes of the corporation. This session is led by Kenneth R. Goodman. Kenneth was in private practice before joining the Ministry in 1990 and joined the Office of the Public Guardian and Trustee— Director Legal Services in 1998.

## **5B - TAX INCENTIVES, RISK MANAGEMENT AND THE CONSERVATION OF ECOLOGICALLY SENSITIVE LANDS: THE ECOLOGICAL GIFTS PROGRAM**

Environment Canada (EC) will present a session that examines land securement from a partnership perspective between EC and donor recipient organizations. Canada's Ecological Gifts Program provides both strong income tax incentives to citizens and an effective risk management framework that has proven to be an effective tool to secure land. The Program has implemented key strategies such as limiting recipient eligibility, establishing standard ecological sensitivity criteria, and completing a thorough and independent appraisal review. Ensuring that transactions are thorough and complete from the outset may reduce the need for future change in use or disposition authorization. A review of the nuts and bolts of securing ecological properties for the long-term will be examined by EC representatives. This workshop is led by Burke Korol, a representative from Environment Canada - Ontario Region.

## **5C - EXPERIENCES LEARNED AYO**

In this workshop, Kristie Virgoe and Jen Baker will provide an overview of the Assess Your Organization program developed by the Ontario Land Trust Alliance with the support of the Ontario Trillium Foundation. Jen Baker has been a volunteer with the Hamilton Naturalists' Club for over 10 years and now works as the Land Trust Coordinator. As Program Manager at OLTA, Kristie has facilitated 11 Organizational Assessments in 18 months. OLTA staff will provide a breakdown of the project and how it was implemented across the province. Content will include a summary of the project, its goals, and how it has contributed to OLTA's understanding

of member needs and future programs. Land Trust staff will provide a unique outlook on how this program has assisted them in developing effective programs and policies. There will be an interactive case study component that will take participants through the implementation of some of the recommendations. This process will highlight the importance of adopting the S&P's while providing practical tools to support land trusts in implementing them back at the office.



**Kingston Brew Pub**

## **5D - CONSERVATION EASEMENTS— HOW THEY AFFECT MARKET VALUE OF ADJOINING PROPERTIES**

Chad Lawley, Assistant Professor in the agricultural economics department at the University of Manitoba, will lead this workshop on conservation easements. Habitat conservation easements remove the option to convert existing habitat to more intensive agricultural use. To the extent that the option to convert existing habitat has value, we expect easements in areas of production agriculture to have a negative impact on land sales values. This workshop presents the results of a research project investigating the impact of conservation easements on agricultural land values in Manitoba. The research project involved the collection of a highly detailed dataset including arms-length agricultural land transactions, the location of conservation easements, and GIS data documenting land cover, soils, and other parcel characteristics. The methodology developed in this research project can be extended to other jurisdictions in Canada.

## WORKSHOP DESCRIPTIONS – FRIDAY, SEPTEMBER 23



**Frontenac Arch Biosphere**

### 1:30 PM - 2:50 PM

#### **6A - BUDGETING AND GOOD FINANCIAL MANAGEMENT**

Openness and transparency in the charitable sector promotes accountability and provides information to its members and the public about what they are doing. To provide accountability an organization must provide an accurate budget and adhere to accepted financial management practices. This is even more critical during times of economic hardship. Therefore it is imperative that organizations take the steps necessary to budget and effectively manage their funds. Presenter Linda Hurdle has over 20 years of financial accounting experience in all aspects of financial planning and policy development. Linda currently runs Hurdle Consulting and is the Treasurer with the Canadian Land Trust Alliance. During this presentation, Linda will outline the steps required to ensure effective budgeting and financial management.

#### **6B - CREATIVE CASES IN LAND SECUREMENT (SUCCESSFUL SECUREMENT ON A TIGHT BUDGET)**

Presenter Robert Orland, President of Orland Conservation, will show land trusts how to take land securement projects from dormant to active and back on track. Common obstacles experienced when negotiating and closing securement agreements can often be overcome by thinking outside the box. By discussing a wide variety of case studies (donations, purchases, split receipts, conservation severances, leasebacks and others) we will demonstrate creative negotiations to obtain win/win solutions as well as the strategic use of partners (federal, provincial, and municipal).

#### **6D - ADVANCED PLANNED GIVING TOOLS**

Presenter Richard Elsmore is an Estate Planning Specialist and Vice President of CIBC Wood Gundy Financial Services Inc. In this workshop, Richard will discuss several techniques used in the area of planned giving. Many of these techniques revolve around the use of life insurance, his specific area of expertise. Richard's focus will be on his personal experience; detailing examples of the actual and practical usage of those techniques. On occasion more than one planned giving technique or structure has been employed in conjunction with another, creating an individualized program specific to a donor's personal needs and goals, resulting in unique and specific benefits for the donor, while ensuring ultimate benefits for charities they support. It is his hope that in sharing some of these experiences new ideas and a new impetus will develop in seeking out these opportunities with the supporters of the Canadian Land Trust Alliance.

### 3:10 PM - 4:30 PM

#### **7A - INCORPORATING STAFF INTO AN ALL VOLUNTEER LAND TRUST - CASE STUDIES**

Based on the experiences of The Couchiching Conservancy, this workshop will focus on three key aspects of a transition from an all volunteer conservancy to a fully-staffed organization: Finding the money to make the transition; Governance as you sort out the roles of staff and board; and Volunteer Management to keep this essential resource engaged once staff is in place. A question and answer period will follow. Ron Reid, founding president when The Couchiching Conservancy was incorporated in 1993 and first Executive Director from 2002-2009, will be presenting alongside Mark Bisset, The Couchiching Conservancy's current Executive Director.



**Parks Canada - Smiths Falls**

## WORKSHOP DESCRIPTIONS– FRIDAY, SEPTEMBER 23

### **7B - DEVELOPING LAND MANAGEMENT PLANS WITH LESSONS FROM THE FIELD**

Leading this workshop is Lisa McLaughlin. Lisa has been with the Nature Conservancy of Canada (NCC) for 10 years. She has worked both in the field as a Conservation Biologist and in office as the Manager of Stewardship in the Ontario Regional office. Lisa asks if land management plans are a great waste of time and paper, or an important tool for land protection? Learn how to achieve the latter by hearing about real examples – good and bad. Do you know the difference between the ‘must have’ information and the data you can live without? Don’t learn the hard way. Save your organization time and money by understanding how the Management Plan can move your organization from measuring your success in ‘bucks and acres’ to real conservation outcomes. A well-crafted Management Plan is the best business planning and stewardship fundraising tool you’ll ever have. Management Plans can do more than gather dust – come and find out how! This presentation is perfect for land managers of all levels, the curious fundraiser and the strategic Executive Director.

### **7C - AMERICAN FRIENDS OF CANADIAN LAND TRUSTS: NEW OPPORTUNITIES FOR CROSS-BORDER CONSERVATION**

Many Americans own land within Canada’s most scenic and significant natural areas. The American Friends of Canadian Land Trusts, a U.S.-based conservation charity, was created to provide the mechanisms and support programs needed both to help Canadian land trusts increase funding support from their U.S. members, and to make cross-border land conservation deals possible, while providing U.S. donors with maximum tax benefits on both sides of the border. This workshop will provide an overview of cross-border land conservation, and a practical step-by-step guide for working on cross-border conservation in Canada. This interactive workshop will allow for plenty of questions, and assistance for specific land trusts, governments or professional advisors contemplating or already starting down the exciting road of cross-border land conservation. This workshop is lead by Konrad Liegel, Stefan Nagel and Bonnie Sutherland. Liegel is a lawyer practising in the general environmental, land use, real estate and non-profit area. Nagel is also a lawyer and a nationally recognized authority on the private protection of environmentally and culturally significant properties. Bonnie Sutherland, the Executive Director of the Nova Scotia Nature Trust and a Board member (and Past President) of the American Friends of Canadian Land Trust, joins Liegel and Nagel in this workshop.

### **7D - BUILDING PARTNERSHIPS WITH LOCAL GOVERNMENT**

Presenter Michelle Albanese, Senior Conservation Specialist with Orland Conservation, and co-presenter Janet Wong, MCIP, RPP, and a planner with the Region of Peel in the Integrated Planning Division, Corporate Services, will demonstrate through case studies how to build partnerships with your local government. York Region became the first Regional government in Ontario to develop a land securement program. Since then, the Regions of Peel and Halton have followed suit. These governments provide funding and capacity support to land trusts, conservation authorities and municipalities for land securement projects. Learn from these case studies how all levels of government are working with land trusts in various ways to achieve a mutual goal of conservation. This session will also share results of a recent “Land Donor Response Survey” conducted by Orland Conservation for the Region of Peel. Sixteen landowners who have donated land or conservation easement agreements in South Central Ontario share their motivations for donating and how conservation organizations can improve the experience for future donors.



**Agriculture - Eastern Ontario**

## REGISTRATION INFORMATION & FEES

Conference registrations will be processed on a first-come, first-serve basis. Field trip and seminars may have a limited capacity so register as soon as possible to ensure your spot. For your convenience, you may register online at [www.clta.ca/en/events/](http://www.clta.ca/en/events/). You will receive an immediate confirmation of your registration. All registration questions can be directed to [davew@rwt.org](mailto:davew@rwt.org).

### CONFERENCE FEES

	<u>MEMBER</u>	<u>NON-MEMBER</u>
<b>Early Basic Registration</b> ( <i>on or before September 7</i> )	\$345	\$395
<b>Basic Registration</b> ( <i>after September 7</i> )	\$445	\$495
<b>One-Day Registration</b>	\$225	\$250

**Basic Conference Registration includes:** all workshops Thursday & Friday, breakfast & lunch Thursday & Friday.

**One Day Registration includes:** All workshops and lunch on day of registration. Tickets for the Opening Reception and Gala Dinner are available separately.

Opening Reception Tickets \$30.00 Gala Dinner Tickets \$40.00

### REGISTRATION DEADLINES

Register by **September 7** to save \$100 on registration fees. Conference registration ends on Friday, September 16, 2011 or when sold out.

### HOW TO REGISTER

1. Fast and easy. Register online using Visa, MasterCard or American Express at [www.clta.ca/en/events/](http://www.clta.ca/en/events/)
2. Fax your registration form to 613-284-8093.
3. Mail your registration form and payment to **Canadian Land Trust Alliance**,  
1 Jasper Ave. Smiths Falls, ON K7A 4B5.

#### Note:

Please register one person per registration form. Photocopy additional forms as needed.  
Full payment must accompany your registration.  
No telephone registrations, please.  
You will be charged a \$25 administration fee for any changes to your original registration.

### REGISTRATION CHECKLIST

Submit registration form before September 7th to save \$100.  
Receive confirmation information.  
Make hotel reservations, see page #18.  
Check website at [www.clta.ca/en/events/](http://www.clta.ca/en/events/) for conference updates.

# REGISTRATION INFORMATION

## **FIELD TRIP FEES: *(not included in Basic Registration)***

The CLTA is pleased to offer two field trips on Wednesday, September 21. Limited space is available, please register early. The cost to participate is \$90.00 per person per field trip.

Note: Please wear appropriate clothing and footwear for the field trip.

## **PRE-CONFERENCE SEMINAR FEES: *(not included in Basic Registration)***

We are pleased to offer two pre-conference seminars, Wednesday, September 21. Space is limited, so register early. The cost to attend a seminar is \$90.00.

## **STANDARD CANCELLATION POLICY**

We must receive your written request for a refund for all conference fees or a particular event by September 15, 2011. If you are unable to attend fees paid will be refunded, less a \$50 administration fee. If for any reason the conference cannot be held, we will strive to refund registration fees if possible, depending on insurance claims honored and the cost of the vendor contracts. Otherwise, we will adhere to our standard cancellation policy. Refund requests should be directed to [lynnm@clta.ca](mailto:lynnm@clta.ca).

## **DISCLAIMER**

The Canadian Land Trust Alliance reserve the right to substitute speakers and provide alternate events owing to unforeseen problems.



**Sugarbush Island, Rideau Waterway Land Trust**

# LODGING & TRAVEL INFORMATION

All Conference activities will be held at Radisson Hotel Kingston Harbourfront

## RADISSON HOTEL KINGSTON HARBOURFRONT

(<http://www.radisson.com/kingston-hotel-on-k715h7/onkingst>)

1 Johnson Street  
Kingston, Ontario  
K7L 5H7  
613-549-8100  
1-888-548-6726



The Radisson Hotel Kingston Harbourfront is a boutique-style hotel situated on beautiful Confederation Harbour in the heart of vibrant, historic downtown Kingston. All rooms and suites at our Kingston, Ontario hotel offer breathtaking views of Confederation Harbour. Recommended in "Where to Eat in Canada," it has become one of Kingston's premier dining destinations.

The CLTA has reserved a limited number of rooms at discounted rates at the Radisson Hotel Kingston Harbourfront. Standard King or Queen guestroom (\$159.00 based on single/double occupancy) per night are available on a first come first serve basis. To make a reservation call 1-888-548-6726 or 613-549-8100 and identify that you are attending the Canadian Land Trust Conference.



## KINGSTON AIRPORT

Air Canada offers regular scheduled air service between the Kingston Norman Rogers Airport and Toronto Pearson International Airport.

Air Canada - <http://www.aircanada.com/en/home.html>

Kingston Car Rental  
- <http://www.avis.com>  
- <http://www.enterprise.com/>

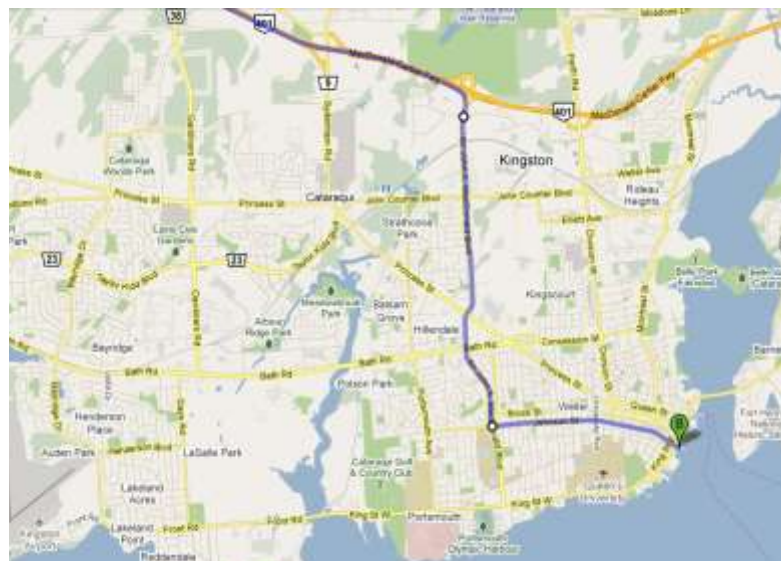
## COMING BY CAR:

### From Toronto/Montreal/Ottawa

Take the Sir John A. Macdonald Boulevard exit 615  
Travel 4.5 km to Johnson St.  
Turn left onto Johnson St - Follow to end

## COMING BY TRAIN:

Kingston is served by Via Rail  
[www.viarail.ca](http://www.viarail.ca)



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**Rock Dunder in September**