

*Presentation to the Ontario Land Trust Alliance
Gathering October 30, 2009*

Workshop 3A 3:00 – 4:15


Stewardship & Monitoring – How Much Does It Cost? Where Do We Find the Funds?

Presenter:
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Background:

- > OLTA establishes a Best Practices Review Committee January 2009;
- > on-line survey by OLTA members with respect to their capacity building needs under the CLTA 2005 Standards & Practices;
- > members vote in April 2009 on "what's important to your organisation ?";
- > results indicated BP material needs to be provided on:
 - 2 D: Records Keeping
 - 6 G: Funds for Stewardship and Enforcement
 - 11 A: Funding Conservation Agreement Stewardship
 - 12 A: Funding Land Stewardship
- > a *Guide* has been developed to address 6 G, 11A, 12A




A Stewardship, Monitoring and Costing Guide is before you for your input, discussion, review and approval.



Review Process to date:

- The *Guide* has been reviewed by a small volunteer working group of OLTA members (July-August);
- The *Guide* has been presented at the CLTA Conference and AGM (September 26, 2009) for review and input;
- The *Guide* is before you and will be circulated to all OLTA members for review;
- Input from this review process has been/will be incorporated
- Adoption by OLTA members at an AGM




The purpose of the *Guide* (currently in DRAFT so your input will be useful!) is to assist Land Trusts in

- (a) understanding their stewardship responsibilities in owning land and holding conservation agreements;
- (b) how much stewardship Best Practices will cost;
- (c) potential sources of funding for meeting stewardship obligations.

Only when a land trust fully understands its stewardship and monitoring responsibilities can it determine the costs that will result from the responsibility of owning land or holding conservation agreements.

These costs, by tracking actuals or estimating from other data, will then form the basis of an understanding of the total funds needed to care for a property.

This annual stewardship funding need forms the basis for calculating the amount of endowment required for this property. This endowment is a necessity for Best Practices, as it enables long term stewardship.



Stewardship and Monitoring – the Annual Cycle


Question: *Why are you monitoring?*

The basis for answering that question is the purpose for owning the land or holding a CA. If the purpose is to maintain and enhance the biodiversity of the property then, monitoring is focussed on:

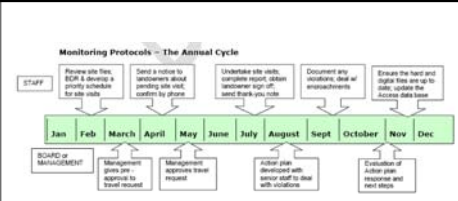
- Looking for human disturbance that may be harmful to biodiversity;
- Looking for invasive species that may harm biodiversity (this involves "caring for the land" = stewardship)

Plus, for conservation agreements...

- Monitoring for non- compliance with the covenants of the CA




Monitoring Protocols – The Annual Cycle



Section 16 (p.17 - 20) of the *Guide* provides cost centres for all these actions


Section 17 (p.20) provides survey results by Parker (2002) that can be used as a basis for keeping CA monitoring costs down

Start tracking the stewardship and monitoring costs associated with each property. An excel tracking form will be provided as part of this Guide



PROPERTY - TIME & EXPENSE TRACKING FORMS
Annual Monitoring Costs

	Time #days	Costs \$/day	Total Cost	Comments
Annual Stewardship and Monitoring Costs				
Property Taxes				
Insurance				
Board				
Staff				
Volunteer				
Travel costs				
Equipment				
Signs				
Administration				




Where will the money come from??\$\$\$\$

Where have you been successful in raising funds??

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-
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Section 18 of the *Guide* provides you with *Examples of Land Trust Stewardship Funding Methods (2008)*, a listing recently compiled by the Land Trust Alliance (USA) associates Jane E. Hamilton and Judy Anderson.

What follows is the overview table provided in Section 18 of the *Guide* that outlines standard funding sources in Ontario.



MULTIPLE REVENUE SOURCES POTENTIALLY AVAILABLE FOR LAND TRUST OPERATIONS


DISBURSERS		COMMENTS
1. INSTITUTIONAL GRANTS AND SPONSORS		
Government	Federal grants	start up funds; workshop funding
	Provincial support	capacity building and monitoring / challenge funds site acquisition
	Municipal support	start up funds; partnerships for site purchase; workshop support; outreach support; annual stewardship contracts; land donations for conservation of "ways"
Philanthropic Foundations	Grants - project	program funding for stewardship, research, education; strategic purchase grants; stewardship grants
	Grants capacity building	outreach grants; data base development; priority areas identification
Corporate	Grants	for stewardship; discretionary donations; for land purchase
	Sponsorship	for workshops; printed material; equine establishments
	Leased	printing costs; furniture; assets
Service Clubs	Stewardship Grants	asset payments
	Site Acquisition	donations
Other Nonprofits	Site Acquisition	matching funds or contributions
	Site Stewardship	BCR assistance; stewardship partners; monitoring partners
2. MAJOR INDIVIDUAL DONORS: Donations of property, funds, securities, planned giving, wills, securities		
3. EVENTS: Conferences; special events; gate		
4. LAND TRANSACTIONS as a source of Revenue		
		• Sales of surplus non-suitable or non-viable sites
		• Sale of land protected by an easement for a "conservation buyer"
		• Sale of "back lands" back donated eventually for future sale (action will be recorded in using this tool as a source of funds for financing)
		• "Reserve Trust" which reserves (conservation) agriculture properties and sold
		• Stewardship fees from a "fee for service" system for stewardship services on land that is publicly owned

Source: Heinenrich, B. JUB. *Examining an Area Land Trust Business Plan JUB - JUTU*


Let's put this all together... 5 Case Studies!

Case 1 -

- discuss a stewardship strategy for this property
- provide some cost estimates ...what size endowment is needed?
- what partners would you involve, if any...
- where would you seek stewardship funds...




Case 1:
(Urban)
Size: 39 ha. (97 acres)
Location: Aurora




Case 2 -

- discuss a stewardship strategy for this property
- provide some cost estimates...what size endowment is needed?
- what partners would you involve, if any...?
- where would you seek stewardship funds...?




Case 2:
(Wilderness)
Size: 85 ha (210 acres)
Location: Lake Nipissing 10 kilometres southwest of North Bay




Case 3 -

- discuss a stewardship strategy for this property
- provide some cost estimates...what size endowment is needed?
- what partners would you involve, if any...?
- where would you seek stewardship funds...?



Case 3:
(Rural - ORM)
Size: 360 ha (890 acres)
Location: City of Kawartha Lakes



Case 4 -

- discuss a stewardship strategy for this property
- provide some cost estimates...what size endowment is needed?
- what partners would you involve, if any...?
- where would you seek stewardship funds...?



Case 4:
(Suburban-
Escarpment)

Size: 3.2 ha. (8 acre)

Location: Burlington,
Halton



Case 5 -

- discuss a stewardship strategy for this property
- provide some cost estimates...what size endowment is needed?
- what partners would you involve, if any...?
- where would you seek stewardship funds...?



Case 5:
(Urban: Natural –
Cultural - Archeological)

Size: 215 ha (531 acres)

Location: Halton Hills



Thank you! Please provide your input to

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