

Connecticut Land Trust Service Bureau

Practice Note #9: Land Trust Stewardship

The stewardship practices of a sample of trusts from all parts of the state were surveyed by LTSB during August of 2003. Half worked in only one town and half covered several towns in their territory. **Though the 14 respondents represented about 11% of all Connecticut land trusts, in terms of combined acreage (15,000 acres fee-owned, 7,000 acres under easement) they account for a third of all land trust holdings in the state.** On average, only 10% of land trusts properties are heavily used by the public, 20% receive medium usage, 30% receive light usage and 40% receive no public usage at all. The trusts reported that about 23% of their holdings are comprised of wetlands. For a summary of the complete survey results, refer to the LTSB Stewardship InfoPak. Among the major findings are the following:

written stewardship policy

- Only eight of the surveyed trusts have a written stewardship policy. Ten manage their stewardship activities through an active Stewardship Committee. Stewardship in the remaining four trusts is handled by primarily one director from within each trust. Twelve of the trusts seek to actively involve volunteers in their stewardship programs, though seven of these experience difficulty in getting volunteers. Eight of the trusts have worked in partnership with other organizations on their stewardship programs.

All trusts should have a written stewardship policy – that is, a document that describes how and by whom the stewardship activities are to be performed. Not having such a policy can place the permanence and continuity of stewardship in jeopardy (refer to LTANet for a sample policy). **For the same reason, and to avoid director burnout, all trusts are encouraged to steward their holdings through standing committees comprised of both directors and non-board volunteers (e.g., land trust members, etc.).** LTSB can provide information on how to best organize and motivate stewardship committees for trusts that are having difficulty securing board and community participation in stewardship activities. For example, some have found that special events that highlight the trust's activities can provide a great opportunity to recruit new volunteers. *Once identified, though, the trust must subsequently reach out to those expressing interest and offer them the chance to become involved on the ground with a specific stewardship objective.* This must often be accompanied by some form of orientation or training. Finally, to keep them involved, regular contact with volunteers is essential, as is recognition of their contributions. **Partnerships with like-minded organizations or even other land trusts are also highly recommended.** They can bring in additional skills, labor force and perspectives to the trust, and may even help it to achieve some of its non-stewardship objectives, such as acquisition and fundraising.

site management plans

- Only 2 of the 14 trusts responding do not prepare management plans for their properties, though most of the trusts that do prepare them have done so only for a few of their largest holdings. None of the trusts surveyed reported having management plans for all of their holdings. None had a master plan for management of their overall portfolio of properties.

It is encouraging to learn that most trusts do engage in some degree of formal planning for the management of their holdings. Though larger properties do tend to require more work of the trust, **even small holdings can have problems that will need to be identified and addressed if they are to maintain their conservation values** (e.g., invasive species can compromise a critical or unique habitat in just a few years). **In this sense, trusts are encouraged to periodically assess the management needs of all their holdings, to ensure that essential management activities do not go undone.** Once the universe of required actions is identified, these can be prioritized, to ensure that the trust is spending its stewardship time and resources wisely. And while management plans do not need to be long and complicated (on the contrary, short and to the point is often better), *they should be in writing, in order to ensure clarity and continuity.*

site visits

- Most of the stewardship efforts of Connecticut land trusts are focused on (1) checking boundaries, (2) posting signs, and (3) building and maintaining trails. On average, in the last ten years, 62% of all holdings had been walked in the field and 67% had been posted. Control of invasive species was identified as the biggest problem, followed by dumping and encroachment, and to a lesser degree, by vandalism, overuse, loitering, ATV use and beavers.

Though the boundaries of most land trust holdings have been walked in the field, a relatively large percentage of holdings have not been visited or marked since they were acquired. **Land trusts should make it a practice to periodically visit all of their fee-owned properties, regardless of size or location, and to complete a written report on the visit for the property file.** Such visits can serve to identify management needs that will figure into the annual stewardship planning cycle. The spread of invasive species is becoming a huge problem for Connecticut conservation. Fortunately, practices for eradication and control are available. For information online, www.dep.state.ct.us/cgnhs/invasive.htm has information and links to other groups including the CT Invasive Plant Working Group. Another good site providing information on identification and control is <http://tncweeds.ucdavis.edu>.

volunteer monitors

- Twelve of the surveyed trusts attempt to assign a monitor or steward to “keep an eye” on each of their larger holdings. Monitors are more or less divided between board members and non-board volunteers from the community. Twelve also make it a practice to contact the abutting landowners of at least some of their properties.

The land trust’s stewardship policy should specify when and by whom each of its holdings should be monitored. **Again, all holdings should be monitored periodically, with the “when” depending on size, use and management complexity.** Assigning stewards from outside the board is a great way to build broader participation in, and support for, the activities of the trust. Though abutting landowners can make excellent monitors, they tend to be underused by the land trust community. *Remember that their awareness of the trust’s activities can in some cases help to build larger systems of protected open space, through eventual donation of land and/or easements.*

monitoring procedures

- Eight of the trusts had a formal program in place for monitoring easements. Most but not all had written procedures. Only seven of the trusts surveyed monitored their easements regularly, usually every year but in some cases every 2 or 5 years. Nine of the trusts made it a practice to prepare a baseline studies prior to acquiring properties or easements. Only three trusts had baseline studies on file for ALL of their easements. On average, trusts that do make it a practice to prepare baseline studies for easements had prepared them for about 70% of the easement portfolio.

Land trusts have a responsibility to the public to monitor all of their easements regularly. Though the degree of regularity may be a function of the types of usage permitted, for the most part, easements should be monitored at least annually, with the findings summarized in a written report. Easements cannot be effectively monitored in the absence of a baseline study documenting the original condition of the property. Land trusts should not acquire easements on properties on which a baseline study has not been prepared. Visit LTANet.org for sample baseline documentation and monitoring reports.

funding

- Six of the trusts maintain an endowment for stewardship, but only four have earmarked a portion of that endowment for monitoring and management of easements.

All trusts should strive to build an endowment for stewardship. Trusts that hold easements should require a contribution to the endowment from the easement donor at the time of donation.

This Practice Note is funded in part through a New England Leadership Grant from the Land Trust Alliance (LTA) Northeast Program underwritten by LTA's generous individual and foundation supporters.