Standard 12: Fee Land Stewardship

The land trust has a program of responsible stewardship for the land it holds in fee for conservation purposes.

Practice 12A: Funding Land Stewardship

The land trust determines the immediate and long-term financial and management implications of each land transaction and secures the dedicated and/or operating funds needed to manage the property, including funds for liability insurance, maintenance, improvements, monitoring, enforcement and other costs. If funds are not secured at or before the completion of the transaction, the land trust has a plan to secure these funds and has a policy committing the funds to this purpose. (See 6G.)

Overall Policy:

It is the policy of the Blue Ridge Land Conservancy to understand and take into account the costs and sources of funding associated with each potential real estate purchase or receipt of gift before the project is approved. This includes costs related to project development (initial project costs, property report preparation, initial stewardship costs) and those related to long term management and enforcement: monitoring, ongoing property management, taxes and fees, and enforcement.

For donations of fee simple land the Conservancy intends to hold for its own use (environmental education, public recreation, etc.) and not transfer to another NGO or a public agency, the Conservancy shall require a contribution into its stewardship fund for these costs. Depending on the circumstances, this may come from the donor, a grant, a fundraising campaign, or other source.

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Many land trusts own land in fee for a variety of conservation purposes, and must take care of these properties. Failure to manage and monitor the property could lead to loss of or damage to the property's conservation values, injury to visitors, or even loss of the property itself. A land trust that does not care for its holdings will lose credibility. A land trust should also make contingency provisions for its land in the event it can no longer fulfill its stewardship obligations.

Practice 12B: Stewardship Principles

The land trust establishes general principles to guide the stewardship of its fee-owned properties, including determining what uses are and are not appropriate on its properties, the types of improvements it might make and any land management practices it will follow.

It is the policy of the Blue Ridge Land Conservancy to be a good steward of any lands it owns for conservation purposes through purchase or gift. In the case of the transfer of a property with sufficient conservation values to a non-conservation agency or individual, a conservation easement shall be placed on the property prior to its sale.

For each owned property intended to be held by the Conservancy, a stewardship plan shall be drafted which considers the following:

- Public access: whether and under what general circumstances it will be allowed;
- Property taxes: whether the land trust seeks exemption, seeks current use assessment, etc.;
- Contributions to the Stewardship Fund: where they come from, how to calculate how much is required;
- Frequency and procedures for monitoring: who monitors and when;
- Habitat manipulation: what type is allowed, under what circumstances;
- Use of properties for research;
- Use of properties for environmental education;
- Use of properties for public recreation;
- Prohibited activities on land trust properties
- Standards for improvements.

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Practice 12C: Land Management
The land trust inventories the natural and cultural features of each property prior to developing a management plan that identifies its conservation goals for the property and how it plans to achieve them. Permitted activities are compatible with the conservation goals, stewardship principles and public benefit mission of the organization. Permitted activities occur only when the activity poses no significant threat to the important conservation values, reduces threats or restores ecological processes, and/or advances learning and demonstration opportunities.

It is the policy of the Blue Ridge Land Conservancy that for any lands it intends to hold in full, it shall develop a land management plan with the following components:

Blue Ridge Land Conservancy – Fee Land Management Plan Format

Name of Property: _____

Date: _____

I. Introduction

A. Directions and Location

B. General Description – brief summary of size, conservation values

C. Description of Surrounding Areas

F. Brief History

1. Previous owner/donor?
2. Previous use/management
3. Donor's wishes
4. Expected period of Conservancy ownership

II. Conservation Features

A. Geology (topography, soil, hydrology, etc)

B. Communities/species of interest to protect

C. Habitats to protect

D. Scenic values to protect

III. Management Issues

- A. Long-term objectives
- B. Short-term objectives - (map)
- C. Improvements and/or infrastructure
  - 1. Trails, signs, parking, fence, gate, etc.
  - 2. Bridges, boardwalks, observation platform, etc
- D. Human impacts - dumping, vehicular traffic, hunting, etc.
- E. Exotic/invasive species control
- F. Restoration
  - 1. Re-introduction of native species
  - 3. Pesticide guidelines
  - 4. Removal/disposal of problem species
- G. Tentative schedule and priority of implementation
  - 1. Monitoring schedule
  - 2. Photo-monitoring

IV. Funding (Stewardship)

- A. Initial Budget needs - salary, expendable supplies, capital equipment
  - 1. Implementation/restoration
  - 2. Improvements and/or infrastructure
  - 3. Volunteer help
- B. Monitoring
- C. Endowment
  - 1. Amount needed
  - 2. Amount secured
- D. Legal Defense

V. Reports on Stewardship Activities

- A. Work day report summaries
- B. Reports on items under “III. Management Issues”
- C. Future/Adjusted plans and estimated dates

VI. Additional Notes

VII. References, Appendices, and additional resources

VIII. Maps

A. USGS

B. Aerial photos

C. Soils

Standard 12: Fee Land Stewardship

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Practice 12D: Monitoring Land Trust Properties

The land trust marks its boundaries and regularly monitors its properties for potential management problems (such as trespass, misuse or overuse, vandalism or safety hazards) and takes action to rectify such problems.

It is the policy of the Blue Ridge Land Conservancy that it monitors any lands it holds in full for conservation purposes, taking into account the items described in the form below:

Blue Ridge Land Conservancy - Fee Simple Land Monitoring Report

1. Property Name:

   Acreage:

   Location:

2. Background:

3. Conservation Easement? Date:

   Summary of Easement (if applicable):

   Purpose:

   Use Limitations:

   Reserved Rights:

   Amendment(s):

4. Monitoring Activities:

5. Past & Current Land Use:

6. Future Land Use/Management Plans:

7. Boundary clarity, issues & posting:

8. Potential Easement or Management Plan Violation Issues:

9. Any signs of trespass or encroachment visible

10. Are the restrictions in the easement being complied with, to the best of your knowledge and observation? Describe:

11. Follow-up:

12. Visit Attendees:

13. Monitor's Name: _____ Signature: _____ Date: _____

14. Materials included with this report:

    Aerial Photos: Maps: Ground Photos: Illustrations:

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Practice 12E: Land Stewardship Administration
The land trust performs administrative duties in a timely and responsible manner. This includes establishing policies and procedures, keeping essential records, filing forms, paying insurance, paying any taxes and/or securing appropriate tax exemptions, budgeting, and maintaining files.

It is the policy of the Blue Ridge Land Conservancy that it shall perform administrative duties relating to lands owned in fee in a timely and responsible manner. This includes establishing policies and procedures, keeping essential records, filing forms, paying insurance, paying any taxes and/or securing appropriate tax exemptions, budgeting, and maintaining files.

The Conservancy shall pay particular importance to the following:

1. Appropriate budgeting for administration of lands owned in fee in the annual budget.
2. Written documentation of all legal agreements, inventories or studies, appraisals, memoranda of understanding, monitoring or management reports, and pertinent correspondence, and storage of these items according to the Conservancy's record keeping policy.
3. Property tax filings, including exemptions.
4. Property and liability insurance.

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Practice 12F: Community Outreach
The land trust keeps neighbors and community leaders informed about its ownership and management of conservation properties.

It is the policy of the Blue Ridge Land Conservancy that it shall keep neighbors and community leaders informed about its ownership and management of conservation properties. This will be accomplished by these types of activities:

- Knowing and meeting adjoining and nearby neighbors
- Sharing goals and plans for the land with neighbors and the community
- Maintaining a rapport with, and engaging the help and support of government and elected officials
- Community outreach programs such as tours or educational activities
- Maintaining a trail system for public use
- Inviting neighbors to help with clean-up and work days to establish a sense of community ownership in the property
- Other activities as appropriate

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Practice 12G: Contingency backup
The land trust has a contingency plan for all of its conservation land in the event the land trust ceases to exist or can no longer manage the property. To ensure that a contingency holder will accept the land, the land trust has complete and accurate files and stewardship funds available for transfer.

It is the policy of the Blue Ridge Land Conservancy that in accordance with its Articles of Incorporation, in the event of the dissolution of the Conservancy, the assets of the Conservancy, including its fee-owned conservation lands, shall be distributed to the Virginia Outdoors Foundation; or, if it is then not in existence, a 501(c)(3) organization.

To be prepared for this possibility, the Conservancy shall maintain adequate legal defense and stewardship funds as determined by the Land Trust Accreditation Commission, as well as accurate and up-to-date records, all of which shall be transferred to the Virginia Outdoors Foundation or a 501 (c)(3) organization should such a scenario take place.

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Practice 12H: Nonpermanent holdings
When a land trust holds fee land with the intention to sell or transfer the land, the land trust is open about its plans with the public and manages and maintains the property in a manner that retains the land trust's public credibility. (See 8L.)

It is the policy of the Blue Ridge Land Conservancy that when it holds land in fee simple land temporarily with the intent to transfer it to a private owner, a public agency, or NGO, it shall follow these guidelines:

- The land should be managed or maintained in such a way that liability risks are minimized and the Conservancy's credibility is maintained.
- Neighbors and community leaders should be aware of the Conservancy's plans to sell the properties and not hold them for permanent conservation.
- Properties that are sold should reflect the property donor's intentions.
- Hazards shall be minimized through the following activities and others: posting the property, chaining off access roads, collecting garbage, removing hazardous trees, maintaining mowed areas and fencing, and addressing any other evident liability concerns.

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Practice 12I: Condemnation
The land trust is aware of the potential for condemnation, understands its rights and obligations under condemnation, and works diligently to prevent a net loss in conservation values.

Because condemnation of conservation land is a rare and complex issue, it is the policy of the Blue Ridge Land Conservancy to consult with its legal counsel and develop a plan of action that is specific to the circumstances of the threatened condemnation. The overriding principles of any plan shall be the Conservancy's duty to defend its owned lands, the likelihood of defeating the condemnation through various legal and non-legal means, possibilities for negotiating a favorable settlement in the event that the condemnation cannot be defeated, and receiving fair compensation by the condemning body in the event the condemnation occurs.