

Standards and Practices

STANDARD 12. FEE LAND STEWARDSHIP

B. Land Management and Stewardship

- 1. Develop a written land management plan for each conservation (■) property within 12 months after acquiring the land to:
 - a. Identify the property's conservation values, including any significant cultural and natural features or those that have significant community value
 - b. Identify the overall management goals for the property
 - c. Identify activities to achieve the goals and to reduce any risks or threats to the conservation values
 - d. Specify the uses that are appropriate for the property, in keeping with the property's conservation values, any restrictions and donor or funder requirements
 - i. Provide public access opportunities as appropriate to the property and the land trust's mission*

*Not an accreditation indicator element

Accreditation indicator elements located at www.landtrustaccreditation.org

WHY DEVELOP A LAND MANAGEMENT PLAN?

A written management plan is essential for each land trust property, no matter how small. A management plan identifies the resources and processes on the land that are to be protected and promoted, determines what actions to take or avoid and designates who shall accomplish those objectives. Land trust properties need a management plan for the following reasons:

- **To protect resources.** The land trust needs to know what resources are on the property and determine how to manage them: scenic views may need to be maintained; rare plants may require special protection; or wildlife habitat may require active management. Failure to locate these resources may mean not only that they are not adequately managed, but that the land trust may inadvertently damage them.
- **To communicate management objectives within the land trust and to future managers.** If the land trust does not have an overall management philosophy and a well-thought-out plan, the care of its properties may be subject to the whims of a few energetic board members. For example, one land trust had an over-enthusiastic board member who took it upon himself to bulldoze a new road on a property! Another land trust started forestry projects that were later abandoned—now it has lots of overgrown Christmas tree plantations. Without strategic planning, a land trust may waste critical resources, create problems for future managers and threaten the integrity of a property. The plan is an essential long-range guide for ever-changing land trust boards, staff and professional land managers.
- **To control damaging uses.** The management plan must address public use. If the land trust does not manage for public use, the public will continue its traditional uses of the property. People may create their own parking areas. One land trust had people blaze trails without the organization's permission. Another had difficulty making trespass accusations stick because it had never determined permissible uses for the property.
- **To build public support and credibility.** A management plan also helps build public support for a land trust property. Town officials are certain to ask how the organization will use the land when considering property tax exemptions; a well-considered response based on the plan will enhance the land trust's credibility.

WHEN TO PREPARE THE PLAN

A management plan should be prepared as soon as possible, ideally before the land trust acquires the property, but the goal should be to complete the plan within 12 months of ownership.

Sometimes natural and biological resource inventories, stakeholder meetings and consultation with experts will take longer. In these cases, an initial management plan would include the known attributes of the property and specify the data collection work and tasks still to be done and a schedule for completing a more detailed plan.

Land trusts may need to implement start-up stewardship practices, such as marking boundaries, dealing with serious hazards, erecting signs and monitoring the new property before inviting the public to use the land. In general, land trusts should delay other activities on the property until the plan is prepared. Owning a new property generates enthusiasm for ways to use it, but it is important to identify the natural and cultural resources thoroughly and their protection needs before adding improvements such as trails, parking areas or kiosks.

Land trusts should update management plans if they add new parcels to the property, if the plan is significantly outdated or if the plan no longer reflects conditions after significant natural or human-caused changes.

∞ For accreditation, a land trust needs to complete a management plan within 12 months of acquiring a conservation property. Similarly, if a new parcel is added to an existing property, the land trust needs to update the management plan to reflect the parcel addition within 12 months of acquiring the parcel. The land trust can incorporate the new parcel into the management plan by updating the maps or by adding the new property information. The Commission also requires updates to relevant sections of the management plan when there are significant changes to the conservation values or natural features resulting from an event like a wildfire or hurricane. Depending on the nature of the changes, the updates may be to sections on conservation values, management goals, activities to achieve those goals or to maps.

WHO PREPARES THE PLAN

Proper stewardship of its properties is a basic responsibility of a land trust. The land trust board sets policies and satisfies itself that it has consulted appropriate experts when necessary. The board has the final responsibility for overseeing the management plan, but in cases where a land trust has staff, the staff usually oversee the actual stewardship activities and management plan implementation in accordance with board policy. A wide array of people, however, can help the land trust develop and carry out the stewardship policies and individual plans.

- **Stewardship committees.** Many land trusts have a stewardship committee that helps set stewardship policies and oversees their implementation. A stewardship committee usually includes knowledgeable persons such as lawyers, scientists, foresters, government agency personnel and informed community members who can provide valuable skills. Land trusts

can draw committee members from the board, general membership, staff and conservation professionals. Members of the stewardship committee should be knowledgeable about the purposes and policies of the land trust.

Statewide or regional land trusts with dispersed properties may form local stewardship committees to assist in preparing management plans, developing yearly work plans and budgets and property inspections (see [Practice 12C](#)). Such committees can also help supervise improvements and restoration projects on the property.

- **College students/classes.** Some land trusts have had success using graduate students, who can sometimes write a management plan as a thesis or term project. Developing a plan may also serve as an excellent project for a university class on resource management.
- **Public agencies.** The [Natural Resources Conservation Service](#), U.S. Department of Agriculture, has prepared conservation plans for some land trust properties, especially agricultural lands. State cooperative extension services may also be available to help the land trust with natural and cultural resources inventories.
- **Consultants.** The land trust might hire a qualified consultant to prepare the plan or parts of it, especially if it involves special resource management, such as rare plant protection, ambitious habitat restoration or forestry management.
- **Specific volunteer help.** Land trusts have been successful in getting volunteer help with developing or implementing their management plans. Foresters can do boundary marking and plant inventories. Local orienteering or geocaching clubs may make trail maps for local preserves. Boy Scouts, especially Eagle Scouts, have done great work for land trusts over the years. Girls Scouts working on their Gold Awards could also be a good resource.

Other possibilities include hiring summer interns or part-time, year-round help to do the legwork, research or to help write the plan.

TYPES OF PLANS

Plans can range from simple and straightforward (a few pages) to complex documents that are more than a hundred pages. Plans can be based largely on the general type of habitat (forest, grassland, wetland, agricultural and so on), but should be property-specific. Land trusts usually write plans for individual properties, but a land trust may have a master plan for contiguous parcels if there is clear identification of which parcels the plan addresses. If specific parcels have unique conservation values (such as varying plant communities) or parcel-specific restrictions (such as

public access), then those should be described in the master management plan. Land trusts that engage in resource management activities on lands they own, including forest management, farming, ranching and similar activities, should ensure that the management plan captures the appropriate information.

The type of management plan should be based upon the mission of the land trust and the characteristics of the property. Management plans for nature preserves will be different from those for agricultural lands or sites that the land trust administers primarily for public use (hiking and other nondestructive recreation). Some plans will have a significant programmatic component (for example, environmental education or interpretation), while others will be primarily resource-based. Plans can range from short-term (interim) versions to complex, long-term blueprints for future modifications and improvements. The exact type of management plan generated should fit with the resource and programmatic goals of the organization.

Common Elements

At a minimum, management plans should identify the property's conservation values and describe the management goals and specific activities to achieve the goals. They may also include the following:

- The size, location and other physical facts about the property
- A description of the resources at the site (inventory information), including identification of the property's conservation values and potential threats to those values
- The land trust's goals and objectives for the property
- Opportunities and activities to achieve those goals and reduce any threats to the conservation values
- A description of the uses that are appropriate for the property, including a summary of any restrictions that came with the property or that the land trust has placed on the property
- An action plan for implementation, including a work plan, budget and a system for monitoring progress



For accreditation, every *conservation property* must have a management plan that includes the following:

- Date of plan or date when an update was completed
- Identification of conservation values (such as cultural, natural or community values)

- Management goals
- Activities to achieve management goals

A *conservation property* includes conservation lands held in fee for perpetuity, even if “forever wild” or not actively managed; conservation lands held in fee for donation, sale, transfer or sale to a public agency or other conservation group; and conservation lands held for sale subject to a conservation easement. If the land trust holds the conservation property less than 12 months, then a management plan is not required for accreditation. If the landowner retains a life estate, the land trust does not need a management plan until it receives the remainder interest in the property.

The required contents listed above give a land trust the flexibility to scale the type of management plan documentation to the type of property. For example:

- The management plan elements for a property that will be transferred to a public agency shortly after one year could be found within the materials provided to the board before project approval or the plan elements can be created using a summary table.
- Management plans must have sufficient detail to effectively protect and manage the property (such as maps with location of key property features or specific activities, summaries of restrictions or donor/funder requirements that inform uses, maps that show property location and boundaries). For example, a management plan for a property with active forestry will need to be more extensive or incorporate annual work plans to accurately reflect the management goals and activities.
- If the conservation property is under lease, then the lease can serve as the management plan, as long as it includes the above contents. (If it does not, the land trust will need to supplement the lease with the missing information).
- A master management plan can cover contiguous parcels if the plan clearly identifies which parcels it addresses. The plan can identify the parcels on a map, with a list or with written descriptions. If specific parcels have unique conservation values, then the land trust should identify these in the master management plan. A master management plan can cover properties that are not physically connected if the landscape is relatively uniform and there are no significant threats on the intervening parcels.

IDENTIFYING THE PROPERTY’S CONSERVATION VALUES

Every management should contain an inventory, whether from detailed scientific investigation, a collection of existing data or observations made during the acquisition process, to identify the property’s conservation values.

- **Natural resources.** An inventory of the physical and biological resources is essential to protecting and maintaining a conservation property. The extent of an inventory depends on the type of resources the property contains and the intensity of proposed management

activities. A natural resources inventory may include plant and animal species lists, plant community descriptions, wildlife habitat limitations and boundaries, geologic and hydrologic features, soils descriptions, forestry surveys, aquatic or marine resources and climate data.

- **Cultural resources.** In addition to biotic and abiotic resources, land trusts need to consider the property's cultural resources, which include both possible artifacts of previous human occupation as well as buildings, roads and other structures. Federal and state law usually mandate cultural resource reviews of sites that receive public funding. In addition, there may be other situations that require the land trust to obtain permits, such as for excavation or the construction of trails. Check with the appropriate archaeological survey office to determine what you need to do.
- **Community values.** Many sites have become "places of the heart" for local residents because of their beauty, wildlife viewing opportunities, cultural features or other special attributes. An old-growth forest of Douglas fir in the West or white oak in the East might be such a place. The land trust should try to accommodate traditional uses, such as a swimming hole or hiking trail, where reasonable, unless such uses jeopardize the conservation values of the property.

These inventories may be based in part on existing management plans created for the previous landowners, surveys, inventories by public agencies (for example, Natural Heritage Inventories) maps and other records. When a property is large and the goals of the organization require detailed biological or ecological inventories, the plan should identify what additional information the land trust will gather and when the plan will be revised to reflect the new information.

IDENTIFYING MANAGEMENT GOALS FOR THE PROPERTY

The plan should state the overall management goals for the property and make clear the priorities among them. These goals and priorities serve as a guide to future decisions and the development of annual work plans.

Typical management goals follow. Specific objectives may vary depending on the property, but the following considerations are common to all properties:

- **Resource protection.** The first management goal should be to carry out the conservation purposes for which the land trust acquired the property. An objective may be to preserve and protect the natural ecosystem of the property. To achieve this objective, the land trust

may specify various actions, such as controlling off-road vehicle use or undertaking prescribed burning, to achieve the goal.

- **Extended protection plans.** A second goal may involve looking at the big picture: Do surrounding properties need to be protected in order to protect the target resources over the long term?
- **Public access.** The plan should identify public use objectives (see below). The land trust should take a careful look at each property to see what type and amount of public access is appropriate so that over the long term the quality and significance of the property will not be damaged. For example, a land trust might close a bat cave to the public or limit visitation to a Civil War battlefield to daylight hours.
- **Productive uses.** Land trusts may be responsible for properties that include productive lands—lands that have some type of income-generating asset, such as farmland, gravel deposits or forestland. Allowing such productive uses may be consistent with or beneficial to the land trust’s conservation goals; they may help maintain an ecosystem or successional state, control deer populations, maintain a desired viewshed or serve as a demonstration area for model farm or forestry practices. In other instances, such activities may interfere with the conservation values of a property. Land trusts should consult with appropriate professionals to determine the effect of such activities before making them a part of the management scheme. Land trusts should also be aware that income from such activities could be subject to unrelated business income tax.
- **Annual obligations.** It should be a management goal for all land trusts to meet their annual obligations in a timely fashion. Such obligations include payment of taxes and liability insurance, filing federal tax forms, budgeting, developing yearly work plans, keeping accurate records and inspecting their properties (see Practices [12B3](#) and [12C](#)).
- **Stewardship policies.** If the land trust has established a set of stewardship policies that apply to all of its properties, such as any general policies it has on public use, property taxes, fire control or plant collection, the land trust should reference these in the plan and adapt them as necessary to the special circumstances of each property.

IDENTIFYING ACTIVITIES TO ACHIEVE THE GOALS

These activities will include the actions taken by the land trust to accomplish the goals and objectives in the management plan. It is often prudent to include a statement about who will do the action and the timeframe for completion. For example, a management plan for a property

acquired with a history of good forest management and substantial timber resources, where the goals are to protect open space and habitat and to demonstrate sustainable forestry, might have the following activities: periodic timber inventories; stand delineations and mapping; prescriptions for forestry activities and their timing; evaluation of access opportunities; post-harvest clean up; and public education events or opportunities.

Actions taken on land trust properties can range from proactive measures, such as intensive restoration efforts, to doing nothing. Although many conservationists once advocated the concept of “letting nature take its course,” climate change, exotic species invasions and human influences on ecosystems reduce the feasibility of this strategy. Active management often includes more intensive manipulation of a site by restoration and rehabilitation activities. Passive management is less proactive but still would require certain basic activities, such as site inspection, addressing any management problems (such as trespass, overuse or vandalism) and protecting the property’s conservation values.

THREATS TO CONSERVATION VALUES

The land trust should consider the threats to conservation values and develop actions to address them. For example, fire or fire suppression is often a threat to ecosystem processes, and the land trust should consider the historical frequency of fire in similar communities, current fuel load, capacity to control wildfire, existence of fire lanes and other aspects of wildland fire potential and the ability to conduct prescribed burns. Crown fires resulting from excessive fuel load may create significant stress in a forest community. In many cases, land trusts lack the training and experience to manage fire; they may form alliances with federal or state agencies or private consulting firms.

Another threat to conservation values is the alteration of historical water regimes that either increases or decreases the wetness of the site. Most wetland plants have a preferred hydroperiod (the depth and duration of saturation or inundation). Determination of the desired future condition (wetter or drier) can guide the hydrologic alteration (for example, removal of tiles or levees, installation of water control structures and so forth).

Feral animals, such as cats, dogs, pigs, goats and numerous other domestic animals, can cause threats to plants and wildlife. Many organisms, such as zebra mussels, have been accidentally introduced and now threaten native species. Native species can also be a threat. For example, native pine bark beetle can cause significant damage to forests that may require some removal of hazards and reduction of fuel load for wildland fire management.

Invasive plant species can outcompete and threaten native species by using light more efficiently (for example, growing early or late in the season), nutrients, water (for example, salt cedar in western states) or other resources. In worst-case scenarios, the invasive plants can establish a monoculture that provides limited habitat and food resources for native wildlife. Methods of control of invasive species include herbicide application, mechanical removal, grazing or herbivory or some combination.

Humankind, including encroachment, unauthorized access, off-road vehicle use, dumping and damage or erosion due to overuse of trails or other property features, may pose other risks to the conservation values. The management plan should include actions to address or minimize the most significant risk or threats to the property's conservation values.

PERMITTED AND PROHIBITED USES

Land trusts protect conservation values (in part) by determining what activities they will permit on their properties. This determination is an important part of developing a management plan. An early step in this process is to identify the critical natural resources on the site (for example, rare/threatened species, high quality streams, prime farmland and so on). Once these priorities are set, the land trust can develop a list of permitted activities that do not harm the property's conservation resources and are consistent with any property restrictions.

Public Access

Many land trusts feel it is important to their mission and the long-term success of land trusts to open land trust properties to the public. Providing public access opportunities, as appropriate to the property, the land trust's mission and the organization's resources, acknowledges that land trusts, as public charities, create a public benefit. In some situations, such as where land is critical habitat for a threatened or endangered species, the public benefit may be entirely related to the protection of the species. Nevertheless, in many situations, public benefit goes beyond the protection of conservation attributes that create a healthy environment for wildlife, scenic views or clean air and water and extends to providing opportunities for public outdoor recreation and education.

Where the land trust's mission includes providing community benefits, the management plan should seek to identify how the property can accommodate reasonable public use while protecting its conservation values. Providing trails, shelters, allowing hunting and fishing, creating venues for outdoor community events, establishing community supported agriculture programs and hosting

community gardens are all activities that could be appropriate on land trust properties, based on careful management planning and engagement with community stakeholders.

The level of public access (which can range from closure to being completely open) should be determined early in the planning process because it affects decisions about prohibited public uses. On most sites, the land trust may provide a list of allowed activities, which typically is shorter than a list of those prohibited but provides guidance to visitors in a more positive manner. Typical allowed uses might include daytime, low-impact activities, such as hiking, photography, canoeing or cross-country skiing. The land trust could also consider higher impact activities, such as camping, mountain biking or horseback riding and large group events, if appropriate. The land trust should spell out in detail a property's allowed uses. If a request is made for a specific use not covered by the current policy or land management plan (such as geocaching, research or special events), the land trust can determine the activity's appropriateness and update the management plan to provide clearer guidance. Clarity about permitted and prohibited uses is helpful to both staff and visitors.

IMPLEMENTATION PLANNING

After collecting relevant information and developing management goals, objectives and a work plan, the land trust's next task is to implement a plan that addresses the conservation priorities of the site. The land trust can usually sort action items into relatively short-term (one to two years) and long-range tasks. Restoration projects that require obtaining and increasing local native seeds and starts (for example, potted plants) may require five to ten years to accomplish. The land trust should prioritize action items based on their importance and the resources available to accomplish the task.

The implementation plan should also include a budget and a system for monitoring progress to achieving the goals outlined in the land management plan.