



Regional Land Securement Strategy

1. Background

1.1 Definition

In The Edmonton and Area Land Trust (EALT) Land Securement Strategy, the term “securement” refers to:

The protection of key natural heritage and EALT properties throughout the Region by a range or suite of tools, including, but not limited to:

- Public and private land stewardship programs
- Policy planning
- Monitoring
- Securement through bequests, easements, donations or purchase

1.2 Why is it important to conserve natural areas, and heritage and rural landscapes throughout the region?

Importance: It is the natural and cultural landscapes that make our region unique and special. There are growing pressures on such features, their functions and the species they support, that can affect the character of the region and its attractiveness for residents, businesses and visitors. EALT works with people to maintain the distinctiveness of our region.

1.3 How Does EALT Decide Which Lands To Protect?

Which Lands: EALT has developed a policy that identifies important types of features to protect, and various criteria to decide whether a project is worthwhile. This information is based on input from local people, research and experience. For properties that landowners themselves bring forward, we gather information to determine whether the site is important, whether we are the right partner to help out, and what approach makes sense to everyone involved.

EALT uses the best available science and community knowledge to prioritize opportunities to conserve natural and cultural heritage in the region. We have selection criteria to guide decisions regarding conservation priorities, and are working to develop a list of priority lands in the region.

2.0 EALT Protects Natural Features, Selects Projects, and Evaluates Projects

2.1 How EALT works to protect Natural Features

EALT works in a variety of ways to achieve its goals:

Accepts donations of lands

Sometimes landowners can consider an outright donation of a property to EALT. Every offer is serious considered and evaluated against the criteria outlined below. We try to accommodate a donor's wishes, which could include naming the property, or specific management practices. We aim to hold donated properties in trust as natural areas. But sometimes, in properties with limited ecological significance, after full discussion with the donor, we might sell all or part of a property to generate revenue to purchase lands of higher conservation values.

EALT obtains a professional appraisal of fair market value (FMV) of donated lands. We issue a charitable donation receipt based on the appraisal. If the lands have high ecological values, we assist donors through the federal Ecological Gifts program, which provides even greater income tax benefits over a 5 year period.

At the time of a land donation, we aim to add funds to our Stewardship Endowment (or to create a property specific endowment) to ensure that future management costs can be covered. Depending on the property's significance and anticipated management requirements, we may first require a target level of stewardship funds to be in place.

Split receipting

Split receipting is another option for landowners. This is a combination of part sale and part donation of a property. For example, if the FMV appraisal of the property was \$100,000, the land trust might agree to pay 40% of the property cost, and to issue a charitable donation receipt for the remaining \$60,000. Often, the tax effects of this combination can provide an outcome surprisingly close to the proceeds of an outright sale, particularly if the sale is subject to capital gains taxes. Landowners considering this option should seek professional financial and tax advice.

Participates in Land Purchases

Outright purchases of lands by EALT will be limited to very significant areas because of the high costs involved. However, we may collaborate with other trusts or organizations. Indeed, EALT is already in partnership with the Nature Conservancy of Canada, Ducks Unlimited, the Alberta Conservation Association and the Alberta Fish & Game Association; we are also partnering with municipalities and other organizations such as The Beaverhill Initiative. Most of the funding needed for land purchases must be raised within the community, which may require an extended period of fundraising.

Negotiates Conservation Easements

Conservation easements (CEs) are protective notations that can help landowners assure the future stewarding of their lands, by granting agreed rights to a land trust such as EALT, to safeguard environmental, scenic or other values of all or part of the land. The easement is registered on title and stays with the land, regardless of who owns it in the future. This ensures that specific wishes of the current landowner are honoured into the future.

While some CE provisions are almost universal (e.g., restrictions on severances or subdivisions, mining or topsoil stripping, altering waterways or draining wetlands) other provisions can be negotiated to suit the specific wishes of the landowner and the land trust. For example, a CE could prohibit all tree cutting except for safety, or it could limit timber removal to firewood or posts for the landowner's personal use, or it could allow logging in accordance with an approved forest management plan.

CEs are usually donated, and often go through the federal Ecological Gifts program. Because the CE will usually lower the market value of a property (e.g., because it is no longer available for development) we retain a professional appraiser to establish the before-and-after property values, and we issue a donation receipt for the difference. There may also be property tax benefits for the landowner. For some landowners, CEs can be a valuable estate planning tool as well as financially effective way of ensuring that a cherished area is stewarded as diligently as the landowner, and is not destroyed by future owners.

Manages Lands

EALT sets high standards for land management, and is guided by the Standards and Principles of the Canadian Land Trust Alliance. EALT may also operate with others, to manage lands not outright owned by EALT. For example, if it is engaged in a partnership. It may also collaborate with other conservancies to manage lands where EALT is not involved in title. A formal agreement would set out roles and responsibilities.

Education and Outreach

EALT is involved in information sharing, education and outreach, related to all manner of conservation information and activities. We may support field studies, inventories, and other ways of increasing the knowledge base, where necessary, in Boreal and Parkland habitats. When we wish to visit lands in private hands, we seek the landowner's permission in advance, and report back on our findings.

We also share information through tours, training, workshops, events, speaking engagements, displays, media articles, newsletters, and interpretive materials and programs.

We also encourage good stewardship by private and public landowners, as we are aware that many landowners feel that conservation is something they try to do on their property on an ongoing basis. They feel themselves to be stewards of their land. We will support and encourage good stewardship by sharing information with landowners about natural features, management techniques and conservation options.

As part of our education and outreach activities, we support improved policies and incentives for conservation. We do not take part in advocacy activities in most cases, unless, say, a municipality requests our expert advice. However, we may comment on proposed official plans and policies, in support of good conservation planning and policies, or participate in technical working groups or workshops to provide advice on a range of topics related to natural heritage and conservation. We will also cooperate with other land trusts and provincial/national organizations in promoting policies and programs that support our work.

2.2 How EALT Selects Projects

EALT is conscious that opportunistic selection of lands or projects is necessary and financially effective, particularly in our early years of operation, when fund-building is necessary. Taking advantage of approaches by landowners or donors is an important aspect – responding to opportunities to accept donations of land or funds.

However, we may be faced with a surplus of opportunities – more land protection projects than can be handled with our limited staff, volunteer and financial resources. So we may need to choose projects to undertake, and identify those to decline or defer.

Priorities

EALT has general priorities on lands, and will focus its conservation and land acquisition efforts on properties that include:

- Large, natural shorelines (lakes, rivers)
- Major corridors or linkages
- Prairie remnants
- Unique topographical features
- Large woodlands
- Important cultural sites
- Areas within or adjacent to natural core and linkage areas (e.g., Elk Island Park, Big Lake Provincial Park, etc.)

Also of particular interest is select farmland, particularly non-active farmland that can be managed for early successional habitat or blocks of farmland abutting existing protected open space property. Large blocks of unfragmented forest or forest blocks abutting existing protected unfragmented forestland are similarly desirable.

2.3 How EALT Evaluates Projects

Project Assessment Criteria

While the general priorities are stated above, we have developed criteria and considerations to help refine the decisions on individual proposals or groups of proposals, and the desirability and feasibility of engaging in conservation activities on properties:

- ecological significance (significant natural, landscape, or hydrological values, features, or functions)
- context
- public benefit
- management needs
- financial feasibility

These criteria are not necessarily clearly black and white; rather they are evaluated on the degree to which they are positive, negative, or neutral factors. For example, some projects may require a greater commitment of resources (e.g., a land acquisition) and we would expect a very high rating on these

evaluation criteria. Whereas for a property being donated with the intention of re-sale for revenue (called “trade lands”) many of the criteria would not apply.

Project Assessment Considerations

Other aspects which we will consider are:

- scientific, educational and cultural value
- external influences
- adverse conditions
- relation to focal areas and regions of interest
- location and size
- natural resources identified by government or other conservation plan
- habitat values
- public access
- scenic resources
- stewardship issues
- partnership support (stewardship endowment reserve)
- viability/condition of habitat and restoration potential
- proportionality (proportion of a property that contains a desired feature)
- degree of threat
- synergy (enhancing adjacent lands, part of multiple assembly, or provision of multiple benefits)
- opportunities
- regional balance
- legal, ethical or public image problems

3.0 Rationales for *Not* Pursuing a Proposed Project

The following provides examples of reasons for EALT to determine that a particular project does not meet the purposes of the Land Trust and/or is not appropriate to pursue:

- The project does not significantly meet the goals, purposes, and criteria of the Land Trust
- There are title or land ownership concerns
- The Land Trust has limited resources and the conservation values of the property cannot be properly protected in perpetuity with what we consider to be a reasonable amount of effort and expense in relation to other land conservation opportunities
- There is reason to believe that a CE would be unusually difficult to enforce (e.g., because of multiple or fractured ownerships, irregular configuration, adjacent development, or other factors)
- The landowner insists on provisions in a CE or donation of the property that EALT believes would seriously diminish the property’s primary conservation values
- The property’s values are primarily scenic, but the general public cannot readily view the property
- Adjacent properties are being developed in a manner that is likely to significantly diminish the conservation values of the property in question