

Strategic Conservation Planning Midwest Case Studies

Revised for the
Strategic Conservation Planning
Through a Freshwater Lens
Seminar
May 14, 2008



Case Study 1: Central Indiana Land Trust, Inc.
Strategic Conservation Planning is an Iterative Process
Dated: February 2007

This case study examines the Central Indiana Land Trust (CILTI). This land has taken an iterative approach to prioritization by developing tools and then adapting them based on their experience with the applications. CILTI was founded in 1990 and by 2007 had successfully protected 880 acres. The land trust protects most of this land through fee ownership as nature preserves, but also holds one conservation easement, as well as two management agreements on additional sites. CILTI began as an all volunteer land trust added its first staff in 2002, and now has two full-time staff members. With a service area of 10 counties, CILTI has known the value of thinking strategically and has been using prioritization tools since 2001.

In 2001, CILTI started their initial efforts to create general priority areas, also known as *focus areas*, within their service area. At the time, CILTI was fortunate to have on their Land Protection Committee Thomas O. Swinford, an ecologist for the state of Indiana's Division of Nature Preserves, who knew the region well. Guided by Mr. Swinford, the Lands Protection Committee identified and named six protection priority areas encompassing the major aquatic and terrestrial natural features found across their service area.

The priority areas are at a large scale, with some areas highlighting the entire length of the main stem corridor of major streams across several counties. Much of CILTI's service area lies in Indiana's corn belt, a highly converted landscape. Because of this, emphasis was placed on those stream corridors with significant forest blocks and known aquatic and terrestrial species richness, a traditional approach used by The Nature Conservancy within the State. These priority areas drew heavily from a GIS overlay analysis emphasizing land cover data (forest block); rare, threatened, and endangered species data; and lands abutting existing managed and protected lands. Although this was a great initial step, the CILTI soon recognized that the priority areas were still too broad to effectively identify, sort and prioritize projects.

As a next step, the Land Protection Committee strategically selected Johnson County for a finer-grained inventory of natural areas and landowner analysis of those priority resources. Mr. Swinford worked with a GIS intern from Indiana University-Purdue University Indianapolis to identify conservation targets within the protection priorities, delineate surrounding buffers that would be necessary to protect those natural resources, and compile landowner contact information.

Once the maps were completed and the property owners identified, CILTI contacted the landowners by mail with an introductory letter and brochure about the land trust. Next, the land trust board members followed up with phone calls to the landowners. According to Land Committee Chair Reta Rutledge, the landowner response "ranged from a pleasantly firm, 'no,' to a hostile, 'I am taking care of my land, leave me alone.'"

In the absence of a comprehensive and continuous commitment to the legwork of land protection on the Johnson County conservation targets, efforts soon languished and attention was turned elsewhere as CILTI entered a period of both staff and board transition in 2004. Nearly three years later, amid a climate of growing public concern in response to a spate of large scale construction proposals, CILTI once again had its attention turned to Johnson County. The initial landowner research paid off with two potential projects. Interestingly, these two landowners had been contacted by friends and neighbors who referred them to CILTI. "The names sounded familiar, and sure enough these were landowners that we had identified earlier," said Ms. Rutledge. One important lesson we learned is - where possible, have the initial contact of landowners identified in a strategic conservation planning process undertaken by land trust members who know the landowners on a personal level. Another lesson is to remember that the land trust is starting a long-term relationship with these landowners and long-term is measured in years, so patience is required for the priority area approach to bear fruit.

On a parallel track to developing the priority areas, CILTI committee members developed project selection criteria to help sort through potential projects. Several examples of natural resource scoring sheets were studied, and a fairly typical score sheet was developed and weighted toward the protection of remnant natural areas within CILTI's general priority areas. The simple one page score sheet was designed to ensure that a parcel was carefully considered and was not a substitute for the board's discretionary role in project decisions.

The team developed 12 criteria with a scoring system to evaluate projects. The criteria are divided into two main sections. The first section reviews the natural area values, such as parcel size or presence of rare species. Also included in the first section is a direct connection with CILTI priority areas, scoring the project on its location relative to the designated six priority areas. The second section evaluates a potential project for organizational values, financial costs, and stewardship issues. The Land Committee is charged with applying these criteria when evaluating a potential land project. They are also used as a way to collect information and organize the project discussion.

A great source of confusion was a simple lesson in semantics. Early iterations of the score sheet contained the word "riparian corridor." It was later replaced with "watershed" in order to not eliminate potential projects along tributaries to priority streams. What was seen by some board members as small change in terms essentially altered the Priority areas from a well defined focus of less than 20% of the service area to include a broader region in the minds of several other board members. One lesson is that the terms used in land trust policies need to be clearly defined in order to prevent confusion.

Project selection criteria have helped Land Protection Committee members organize their thoughts regarding tough transactions. Typically a project that is declined is of a small acreage, has significant exotic invasive species, and comes with added complications such as a high project cost or overarching legal issues. The criteria have helped educate board members on what to look for regarding natural resources. Ms. Rutledge explains

“We are lay scientists and we know we can’t protect all of the land that we’d like to. Our priority areas and priority watersheds were an attempt to both focus our efforts and to educate us as lay scientists. By using criteria and priority areas it has certainly changed my perspective over the past seven years on how look at conservation land.”

With two years of experience in applying the criteria, Land Protection Committee members have some ideas on adjustments they would like to make to improve the criteria. Recently CILTI has been wrestling with urban conservation. An urban wood lot, which would make a great pocket park, does not fare well under the current criteria. Creating a separate category of criteria for those projects may be a future adjustment. CILTI frequently applies for state funding to support its projects. However, the criteria used by state agencies tend to favor much larger projects or projects directly connected with state lands; hence a project that might look good from the CILTI criteria may not rate the same under the state agency criteria.

Strategic conservation planning is fundamentally an iterative process, with adjustments and revisions based on the experience of actively using tools such as focus areas and project selection criteria. The next iteration for CILTI is a commitment to develop a strategic conservation plan for their entire 10 county service area. By the end of 2007 a comprehensive natural resource inventory will have been completed. Based on the findings from the inventory, a GIS based prioritization model will be developed to help select conservation focus areas. CILTI’s experience with prioritization over the past several years will help make their next planning process even more relevant and useful to their needs.

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Central Indiana Land Trust Incorporated, Land Project Scoring

Directions: This form shall be used to score all potential land projects. As a minimum requirement, all property considered should be in CILTI's 10-county service area. 0 points is the default for all criteria, add points for all criteria that apply.

Prospective Land Project Name and Location:

Total Score: Scorer: Date:

<u>Possible Points</u>	<u>Criteria</u>	<u>Points Awarded</u>
Part 1: Natural Areas Value		
A. Priority Protection Status Values (select all that apply):		
4	Site falls within a CILTI Priority Protection category	
2	Parcel is within a priority watershed	
B. Natural Area Values (select one):		
8	Over 50% of parcel is a high quality remnant natural area with minimal history of disturbance. Parcel is relatively free of exotic plant species.	
4	Parcel is predominantly (>75%) highly disturbed or regrowth native vegetation/forest as evidenced by high incidence of exotic plants and low vegetative diversity.	
0	Parcel is predominantly covered in non-native vegetation and/or no vegetation (i.e. Old field, fescue, agricultural field); restoration project.	
C. Size and Potential for Expansion/Connectivity Values (select one):		
8	Parcel is greater than 40 acres in size.	
4	Parcel is greater than 20 acres.	
0	Parcel is less than 20 acres.	
Expansion (criteria includes parcel itself, select one):		
8	Parcel is part of a large contiguous forest/riparian block of at least 200 acres.	
4	Parcel is part of a forest/riparian block of at least 100 acres.	
1	Parcel is part of a forest/riparian block of at least 40 acres.	
Connectivity (select one):		
6	Parcel shares a boundary with an existing CILTI project.	
2	Parcel shares a boundary with an existing non-CILTI protected area.	
D. Riparian Corridor, Watershed Protection and Water Quality Values (select one):		
4	Parcel has over 500' of perennial river or stream frontage.	
1	Parcel has 50'-500' of perennial river or stream frontage.	
E. Rare and Endangered Species Value (select one):		
4	Parcel supports 1 or more rare, threatened or endangered species.	
1	No RTE species documented on the parcel, but suitable habitat exists.	
F. Rare or Uncommon Habitat Type Values (select one):		
6	Parcel contains a rare or uncommon habitat type, i.e. hemlock grove, seep wetland, prairie, fen	
2	Habitat unusual in CILTI preserves or service area	
0	No unusual habitat	
TOTAL Natural Area Value (possible 50)		0

Prospective Land Project: _____

<u>Possible Points</u>	<u>Criteria</u>	<u>Points Awarded</u>
Part 2: Organizational Value and Costs		
A. Initial Project Cost and Feasibility (select one):		