PLANNING FOR MANAGEMENT OF
FEE LANDS

BY JoAnn Albert and Lisa Smith

WILLIAM ERBY SMITH'S BEQUEST OF 365-ACRE WAU-KE-NA is the largest of Southwest Michigan Land Conservancy's preserves and includes forests, fields, streams, ponds, bluffs and beaches. Wau-Ke-Na, meaning "forest-by-the-water," is named for the rich forest along the shores of Lake Michigan on the northern tract of the preserve.

"One of the great challenges land trusts face is that the conservation values we promise to protect in perpetuity are dynamic," says Nate Fuller, conservation and stewardship director for the conservancy. "These lands are not jewels under glass; they are wonderfully grubby, organic, interactive systems—and more beautiful as a result. That interactive piece is key; it is what connects us to the landscape and builds a sense of place."

Southwest Michigan Land Conservancy, like many land trusts around the country, protects land by taking ownership and then managing that land in perpetuity. Land trusts should follow basic guidelines for managing their "fee" lands (a term derived from "fief"), and the way to start is with a management plan.

The Importance of Management Planning

Management planning is the act of determining how to steward land in perpetuity. Stewardship, in its broadest sense, includes working to maintain or improve the ecological processes and functions of the landscape. When stewarding land, we target conservation values, those key values that motivate protection in the first place. Failure to manage, maintain and, in some cases, restore conservation values for the long term may result in the loss of those values, as well as the loss of public support and funding. Management planning helps to ensure that the land and conservation values will be protected as intended, even as staff or board members change over time.

No one can understand all of the complex interactions of species and their environment, but it is critical to have a basic knowledge of ecological principles when planning for the management of natural systems. Assessing ecosystem processes, structure, function, habitat, population dynamics, and connectivity and adaptive management principles will ultimately position a land trust for greater success in managing healthy, stable landscapes.

Components of a Management Plan

Natural Lands Trust (NLT) in Pennsylvania owns and manages 40 nature preserves totaling more than 21,000 acres that include almost every major ecosystem type in the region. Each of these preserves has a land management plan, and NLT has found the planning process to be a valuable tool to identify concrete goals and prioritize stewardship efforts. "The plans are like blueprints for us," says Scott Wendle, vice president of preserve stewardship. "We know which projects to focus on and when to focus on them." With nearly two-thirds of its staff dedicated to stewardship, NLT finds that land management plans also

From *Land Trust Standards and Practices*

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.*

*The Land Trust Alliance has designated Practice 12C an indicator practice. The Land Trust Accreditation Commission evaluates land trusts based on their proven ability to manage their fee properties for the long term.

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The 1,263-acre ChesLen Preserve, owned and managed by Natural Lands Trust, is popular with hikers, equestrians and kayakers. A new management center under construction will provide gathering spaces for educational activities and community celebrations, and will serve as a base for the organization's volunteer program.

SIMONE COLLINS LANDSCAPE ARCHITECTURE/GEOFF CREARY

keep everyone on the same page. "It's all there in black and white," he says.

In some cases, the land management planning process begins even before the transfer of ownership is completed. In the case of two of the largest and more recently acquired preserves—Bear Creek (3,412 acres) and ChesLen (1,263 acres)—NLT staff completed "interim management plans" as part of the transaction process. Oliver Bass, vice president of communications and engagement explains, "These preliminary plans are essential for assessing the long-term costs of managing the properties. The plans also help staff craft an inspiring vision that strengthens support from the landowners and other stakeholders."

A management plan, regardless of its size or scale, should include the following elements:

1. Description of the resources
2. Threats to conservation values
3. Goals and objectives
4. Actions needed to meet goals and objectives (includes a timeline)
5. Monitoring activities and a schedule
6. Schedule for regular review of the plan and process for adapting the plan if needed

Planning starts with the collection of information about the site's natural and cultural features, which helps to determine site needs and limitations and lays the foundation for the management plan. Much of this information can be collected during the acquisition phase of the project.

Property Information and History

It is best to capture basic property information, such as past ownership, property name and location, legal documents, zoning and other land use restrictions, donor intentions, funders and land use history at the beginning of a management plan.

Survey

A property survey gives the land trust a clear sense of boundaries and easement or title issues that exist on the land. Significant stewardship issues can arise if the land trust or its neighbors are not aware of property boundaries. Encroachment on boundaries can result in loss of conservation values, asset value and public support.

Resource Inventory and Mapping

Identifying the living elements such as plants and animals and nonliving elements such as soil, water features and bedrock that exist on the property provides the building blocks of the management plan. These inventories are critical to knowing what to manage and can identify rare species or natural communities that require special management. Ideally, an initial documentation of site conditions should take place prior to or during the acquisition phase, which creates a baseline to compare change over time.

Historic Conditions

For community or species restoration projects, investigating the historical natural conditions of a property may be necessary.

JESICA BLAKE

The North Carolina Coastal Land Trust has initiated a prescribed burn program at the B.W. Wells Savannah with grants from the Natural Resources Conservation Service, the N.C. Wildflower Preservation Society and the U.S. Fish and Wildlife Service.

Improvements

Land trusts should assess the condition of buildings and other improvements to determine which to keep, update, add or demolish. Considerations may include relevance to programming objectives (signage, interpretive displays), safety, costs for upkeep or removal, insurance and staffing. Pay special attention to bridges, dams or other structures that would require large investments for repair or maintenance.

Risks and Hazards

Risks and hazards to human and environmental health should be assessed on a regular basis. A land trust should conduct a Phase 1 environmental site assessment—the standards of which are set forth by the EPA—prior to acquisition to identify potential risks and liabilities. More informal assessments can also be conducted to uncover other hazards, such as diseased or dying trees near roads or trails, caves or other natural features that could pose a risk to the public.

Resources

Search "fee land" on The Learning Center, http://learningcenter.lta.org, for a wealth of documents, maps, templates, and the curriculum book itself. And thanks to a generous grant from the Richard King Mellon Foundation, the Land Trust Alliance together with E-Concepts, LLC of Pennsylvania recently developed a new Fee Land Stewardship Program Assessment tool (FLSPA), designed to assess a land trust's current stewardship practices with respect to its fee-owned properties. For info, contact Sylvia Bates, Alliance director of standards and research, at sbates@lta.org.

Human Uses and Values

Properties with prior public access can include hiking trails, swimming holes, dumping areas, ATV and mountain bike trails and camping, which can create challenges (or opportunities) for the management of conservation values. Long-standing land uses can create a sense of entitlement that can be difficult to change. Diligent communication, education and personal contact often leads to successful resolution of any conflicts.

Awareness of surrounding land uses, development trends and demographics can guide long-range management planning. Having as much clarity about potential conditions, such as future development adjacent to a protected property or growing interest in hiking trails on a property, can help in projecting what types of stewardship activities will be necessary (bigger parking areas, restricting or limiting visitation to protect a highly endangered plant or animal population, etc.).

A land trust must also assess how to address the Americans with Disabilities Act mobility device evaluation factors (see www.lta.org/land-trusts/ada-and-land-trusts).

Cultural Resources

Determine the significance of any cultural resources that exist on a property. A structure such as an old school house might have federal, state or local historic significance, which will affect how the structure is managed.

Threats to Conservation Values

When the resources and conservation values of the property are identified, it is then important to discern what conditions exist that are threatening their health and future existence. Examples of threats include the presence of invasive species, overpopulation of or overgrazing by animals, changes to water flows, fire, human overuse and, in some areas, lack of controlled fire.

"Some of our properties have been fire suppressed," says Jesica Blake, director of stewardship for the North Carolina Coastal Land Trust (NCCLT). "Our management plans address the burn strategy from the reintroduction of fire to the long-term burn regime the site will require. We also identify the funding sources and contractors who will be conducting the burns."

The North Carolina Coastal Land Trust owns almost 6,000 acres and has a management plan for each site. The B.W. Wells Savannah is host to more than 170 native plant species, including several rarities. NCCLT is currently restoring more of the rare savannah habitat and has initiated a prescribed burn program with grants from the Natural Resources Conservation Service, the N.C. Wildflower Preservation Society and the U.S. Fish and Wildlife Service.

A Teaching Opportunity

Fee properties provide land trusts with an opportunity to educate their communities about land conservation. "We provide children with a positive experience and hope it resonates with them," says Alison Berry, education coordinator at the Little Traverse Conservancy in Michigan. "These programs, in a sense, guide them into awareness that they are a part of nature and need it to live a healthy lifestyle." *CARING FOR LAND TRUST PROPERTIES*, PGS. 100-101

"We have come to realize that management plans are an essential component of owning land. It keeps us on track—headed toward our original conservation goals and optimum conservation conditions for the property," says Blake.

Goals, Objectives and Actions

The essence of management planning is the development of goals, objectives and actions for a property. It is here that the land trust identifies how to manage land in perpetuity. Based on what was learned about the site resources, the land trust should develop a vision of how it wants those resources to look 50 to 100 years in the future.

Identifying goals and objectives is an opportunity to communicate the land trust's intent for a property over time and provides a long-range guide for future decisions, even as board members, staff and land managers change. A first step in defining goals is internal consensus-building, making sure that everyone involved in the planning process understands that goals must be guided by meeting the land trust's mission and stewardship principles, protecting conservation values and balancing public use. If not already in place, a land trust should establish stewardship policies and principles to provide general guidance for the management and use of all of its properties. Stewardship policies might address permitted or prohibited uses, monitoring frequency and standards for improvements, while stewardship principles identify the organization's overarching philosophy toward land management.

SKAGIT LAND TRUST

Skagit Land Trust's land steward, Jim Johnson, works in a preserve with the help of a local high school student.

Site-specific goals are based on the ecological and programmatic features of the property. The first priority is to identify which conservation values are the most important to protect. Permitted and prohibited uses are then determined, including the amount of permitted use that will not harm the long-term protection of the property's conservation values.

Management activity on land trust properties can vary widely. When developing goals, objectives and actions, consider the types of management activities that could be done, as well as the level of active management the land trust is interested in or capable of pursuing. Possible stewardship activities include preservation, restoration and passive management.

Preservation is used to maintain high-quality ecosystems that do not need major intervention. The key in preservation is to minimize human disturbance and manage to continue historical conditions.

Restoration is the reestablishment of a historical community and can include removing a threat, restoring natural processes or reintroducing a native species. These projects can be costly and often take many years to complete. Steps in restoration projects include identifying the historical community through land survey records, soil characteristics, neighboring community make-up and historical aerial photographs; planting or introducing the appropriate species; and managing the site to support the community.

Passive management allows succession to happen without interference. This concept of "letting nature take its course" is a much less feasible strategy today with impacts from climate change, invasive species and habitat destruction. Even passive management requires a minimal level of action to protect the conservation values by monitoring the property and addressing threats.

Incorporating maps in the plan is a useful tool for clarifying planned actions. Maps can be used to indicate both current conditions and long-term target vegetation goals, for example. For larger properties or those with a variety of ecosystems, functions or management activities, the management plan is often divided into management units; each unit is described in the plan and has a separate set of goals, objectives and actions.

Implementation and Adaptive Management

Once the management plan is in place, the next step is putting the plan into action. Actions can be prioritized based on their importance and the resources available to accomplish the task. In addition, the land trust will need to obtain the labor, expertise and financial resources necessary to implement each action. For oversight and coordination, have one person responsible for implementing the plan.

The success of Skagit Land Trust's stewardship of its 23 conservation areas in Washington is directly tied to the organization's volunteer land steward program. Each conservation area has a volunteer who agrees to monitor the property regularly and act as the property's advocate, caretaker and guardian. For example, Jim Johnson is a land steward who looks after the 200-acre Cumberland Creek Conservation Area. In addition to submitting regular monitoring reports, Johnson wanted to make a connection between the natural landscape and kids from a local high school for disadvantaged youth. The result is a mile-long interpretive trail, with numbered posts and a natural and cultural history brochure, all of which was developed and installed by the students. Even better was the transformation of the youth from wary teens with little interest in being in the woods to fellow stewards of the property. "This popular trail serves as a testament to the power of volunteers to reach deep into the community in the service of land conservation," says Michael Kirschenbaum, stewardship director.

After implementation, regularly scheduled monitoring and assessments are necessary to identify whether goals are being met and management activities are having the desired effect. Reviewing the plan every few years provides an opportunity to evaluate and modify it as needed. Management plans are working documents. They can and should be adapted to meet changing management needs for the property.

A Long-Term Commitment

Land trusts may or may not have staff or volunteers that are trained and educated in the areas of botany, ecology, natural resource science or land stewardship, areas of expertise and knowledge that are important for compiling the elements of a management plan. Land trusts without experienced personnel may find it beneficial to look outside of the organization for assistance with management plan development.

Wau-Ke-Na is a special place for wildlife, and Southwest Michigan Land Conservancy plans to build upon William Erby Smith's work improving wildlife habitat, creating wetlands and sowing grasslands.

KALMAN CSIA

When Southwest Michigan Land Conservancy received the Wau-Ke-Na Preserve, it received grants to help defray the cost of hiring consultants to inventory the site and develop a management plan. "There was so much habitat variety on the site that we needed help wrapping our heads around the management potential," says Nate Fuller. "The consultants found incredible plant diversity, but most importantly, located a plant community on the bluffs of Lake Michigan that the state natural features program now recognizes as a specialized plant community—currently the highest quality example in the state."

Fuller says the conservancy has "tremendous volunteer resources who have built great species lists for our preserves over the years. But sometimes we've found we need to hire a professional to do a comprehensive site assessment in a relatively short period. Having a third party perspective can be helpful in many ways, and we've been able to use these plans to help secure grant support to implement management. It has enabled us to push the ecological restoration of some of our preserves years ahead of schedule."

SWMLC takes stewardship to heart. "We aren't here to just document conservation values on properties," says Fuller. "We believe in actively taking care of the landscapes that sustain our quality of life. It takes commitment from our board, staff, volunteers and membership. It is a commitment that shapes all of the work we do and allows us to connect with people and their land in a very real way."

THIS ARTICLE IS BASED ON THE LAND TRUST ALLIANCE'S STANDARDS AND PRACTICES CURRICULUM BOOK, *CARING FOR LAND TRUST PROPERTIES* BY HUGH BROWN AND ANDREW PITZ (2008). **JOANN ALBERT** AND **LISA SMITH** ARE PRINCIPALS IN E-CONCEPTS, LLC, WITH A COMBINED 40+ YEARS OF EXPERIENCE WORKING FOR LAND TRUSTS AND NATURAL RESOURCE AGENCIES IN PENNSYLVANIA TO ASSIST WITH THE MANAGEMENT OF THEIR FEE AND EASED PROPERTIES. THEIR BACKGROUNDS AND EXPERIENCE INCLUDE PROVIDING AND DEVELOPING ASSESSMENTS, TRAINING, ACCREDITATION READINESS, OUTREACH AND EDUCATION AND TECHNICAL ASSISTANCE.