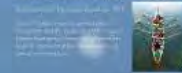




PENNSYLVANIA LAND TRUST ASSOCIATION

75 conservation organizations



Improve Public Policy



Advocate for better policy

Monitor protection source agenda



Build Tools for Excellence & Efficiency



Model legal documents

Technical guides

Conservation tools case



Assist Organizations and Build Community





PENNSYLVANIA LAND TRUST ASSOCIATION

75 conservation organizations

Incorporated by land trust in 1995

Protect Pennsylvania special places - the farms, forests, fields and other green spaces that people love - the places that help to ensure healthy, prosperous and wise communities.



Improve Public Policy



Advocate for better policy



Maintain proactive policy agenda



Build Tools for Excellence & Efficiency



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PENNSYLVANIA LAND TRUST ASSOCIATION



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PENNSYLVANIA LAND TRUST ASSOCIATION

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Protect Pennsylvania's special places... the forests, fields, parks and other open spaces that people love. The places that help to ensure healthy, prosperous and vibrant communities.



Improve Public Policy



Advocate for better policy
• Work to influence state-level legislative and regulatory decisions
• Work with state agencies

Maintain proactive policy agenda
• Research and analysis
• Database and resource building



Build Tools for Excellence & Efficiency



Model legal documents

Technical guides



Assist Organizations and Build Community



Improve Public Policy



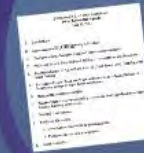
Advocate for better policy



- direct in Harrisburg
- via land trust staff, directors and members
- with help of allies



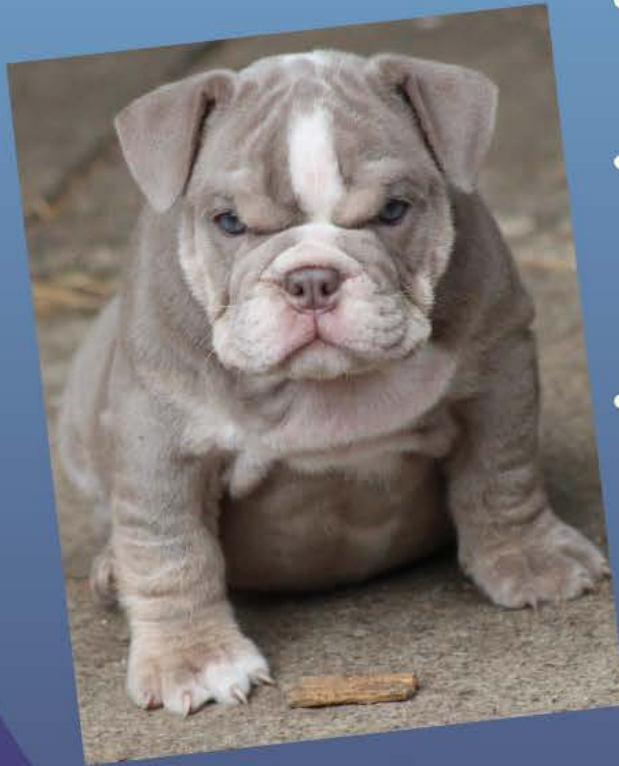
Maintain proactive policy agenda



- Research and analysis
- Discussion and consensus building



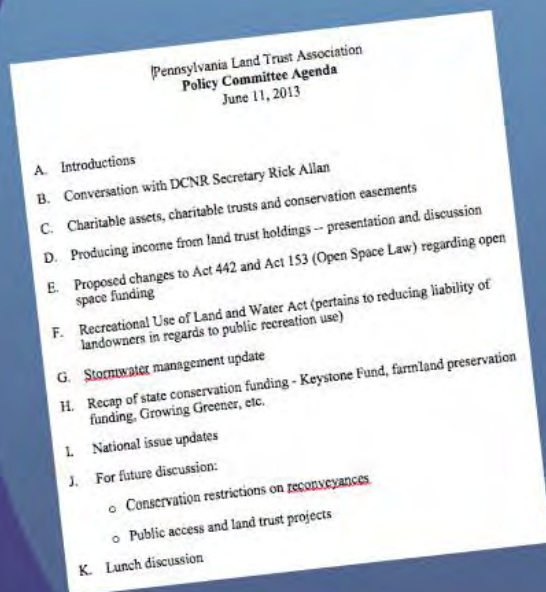
- Stopped "sell parks for easy cash" bill
- Stopped quick and easy repeal of open space programs
- Exempted conservation easements from transfer fee ban



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- Stopped quick and easy repeal of open space programs
- Exempted conservation easements from transfer fee ban



Maintain proactive policy agenda



- Research and analysis
- Discussion and consensus building



Advocate for better policy



- direct in Harrisburg
- via land trust staff, directors and members
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Sampling of successes

- Keystone Recreation, Park and Conservation Fund
- Growing Greener
- Environmental Stewardship Fund
- Ag Conservation Easements made permanent
- Municipalities may donate to land trusts
- Erie Golf Course - Supreme Court
- Federal tax incentives

Sampling of successes

- Keystone Recreation, Park and Conservation Fund
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- Ag Conservation Easements made permanent
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- Federal tax incentives



PENNSYLVANIA LAND TRUST ASSOCIATION

75 conservation organizations

Incorporated by land trusts in 1995

Pushed Pennsylvania's natural beauty to the limits, leaving parks and other green spaces that would have been paved over. Help to ensure healthy, renewable and scenic environments.



Improve Public Policy



Advocate for better policy

• Drafted legislation that has been passed into law

Maintain proactive policy agenda

• Long-term and short-term strategies and initiatives and proactive advocacy



• Support legislation that would help protect parks and other green spaces



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The Future

Maintain proactive

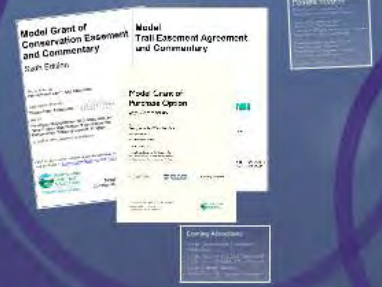
policy agenda

- Research and analysis
- Discussion and consensus building



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Model Grant of Conservation Easement and Commentary

Sixth Edition

Prepared by the Pennsylvania Land Trust Association

with support from the William Penn Foundation

and the Pennsylvania Department of Conservation and Natural Resources Bureau of Recreation and Conservation "Growing Greener" Program as well as other generous contributors.

Find the most recent edition of this document as well as guidance at ConservationTools.org and ConserveLand.org



Model Commentary

Model Trail Easement Agreement and Commentary

Model Grant of Purchase Option with Commentary



Model - 9/11/2010
Updated - 9/11/2010

- ### Posted Models
- Model Grant of Conservation Easement
 - Model Business Sales Protection Agreement
 - Model Trail Easement Agreement
 - Model Grant of Trail Document
 - Model Grant of Purchase of Recreatory Access Easement
 - Water Quality Improvement Agreement
 - Model License/Lease/Transfer of Conservation Easement
 - Model Maintenance Agreement Regarding Conservation Easement
 - Model Trail Maintenance Agreement

PUBLIC DEEDS AND FEES FOR PARKS AND RECREATION

A Guide to Using Pennsylvania Model Documents

Bridge Loans for Conservation Purchases

Borrowing from Revolving Loan Funds

Introduction 1
A Crucial but Temporary Lack of Money 1
Existing Programs 1
Advantages of Revolving Loan Funds over Commercial Lenders 1
Steps for the Borrower to Consider 2
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The Conservation Fund 3
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Regional Loan Programs Available for Pennsylvania Projects 4
Western Pennsylvania Conservancy 4
Open Space Institute 5
Case Studies 5
Related Resources at Conservation Tooling 9

Introduction

When an organization must close on a real estate transaction prior to securing all the necessary funds, borrowing will be necessary for the deal to proceed. A number of conservation-based, nonprofit organizations manage revolving loan funds that provide low and no-interest, short-term financing to facilitate land and easement purchases for conservation purposes.

A Crucial but Temporary Lack of Money

Timing can make or break a conservation deal. If a seller has to sell by a certain date or is simply having an "selling quickly," an organization must come up with the necessary financing on the seller's timeline or let the conservation opportunity pass. If the organization does not have sufficient cash at hand and the opportunity is too important to lose, the organization will have to turn to borrowing.

Last updated on 10/23/10 10:59 AM

- ### Coming Attractions
- Model Conservation Transaction Addendum
 - Model Purchase and Sale Agreement
 - Model Grant of Right of First Purchase
 - Model Activity Release
 - Model Trail Maintenance Agreement

Posted Models

Model Grant of Conservation Easement

Model Riparian Buffer Protection Agreement

Model Trail Easement Agreement

Model Grant of Trail Easement

Model Grant of Fishing & Boating Access Easement

Water Quality Improvement Easement

Model Stewardship Funding Covenant

Model Mortgage Subordination

Model Preliminary Agreement Regarding
Conservation Easement Donation

Model Grant of Purchase Option

Coming Attractions

- Model Conservation Transaction Addendum
- Model Purchase and Sale Agreement
- Model Grant of Right of First Purchase
- Model Activity Release
- Model Trail Maintenance Agreement

Posted Models

- Final Report of Conservation easement in a rural Wisconsin dairy production area
- A National Framework of Protected Areas
- Management of a National Park
- Land Use Management in a Rural Area
- Conservation easement in a rural area
- Final Report of a Conservation easement in a rural area
- Final Report of a Conservation easement in a rural area
- Final Report of a Conservation easement in a rural area
- Final Report of a Conservation easement in a rural area

Shortcuts to Guides

- Land Use Ordinances & Development Standards
- Acquiring Land & Easements
- Financing Conservation
- Landowner Incentives
- Land Stewardship & Property Management

PUBLIC DEDICATION OF LAND AND FEES-IN-LIEU FOR PARKS AND RECREATION

A Guide to Using Section 503(11) of the Pennsylvania Municipalities Planning Code



Bridge Loans for Conservation Purchases

Borrowing from Revolving Loan Funds

Let one or several short-term loans be available to help nonprofit organizations complete land and easement purchases for conservation purposes.

- Introduction 1**
- A Crucial but Temporary Lack of Money 1**
- Existing Programs 1**
- Advantages of Borrowing Loan Funds over Commercial Lenders 1**
- Issues for the Borrower to Consider 2**
- Bridge Loans Available Nationwide 3**
- The Conservation Fund 3**
- Norcross Wildlife Foundation 3**
- Regional Loan Programs Accessible for Pennsylvania Projects 4**
- Western Pennsylvania Conservancy 4**
- Open Space Institute 5**
- Case Studies 5**
- Related Resources at ConservationToolbox 9**

The willer is a capital free place to go for financing. The Pennsylvania Land Trust Association has published two guides, *Seller Take Back Financing and Leasehold Easement Financing*, that address this scenario. When the willer is not agreeable to financing the transaction, a bridge loan through a revolving loan fund, set up specifically to assist conservation projects, is the next best option. These revolving funds provide short-term loans at low or no interest for transactions that meet the criteria set by each fund. (The issue *A Land Issue in Conservation Finance* explores additional financing strategies.)

Existing Programs

Dozens of conservation-based revolving loan funds exist across the country; most of these funds are focused on a specific region or natural landscape. They have varying administrative structures some are operated by large land trusts such as The Conservation Fund, others by foundations such as the Norcross Wildlife Foundation, and still others by nonprofit organizations such as the Colorado Coalition of Land Trusts.

This guide includes profiles of four revolving loan funds that can provide bridge loans for land and easement acquisitions in Pennsylvania.

Advantages of Revolving Loan Funds over Commercial Lenders

Revolving loan funds designed to support conservation projects may offer substantial advantages over commercial lenders:

- Their interest rates are typically lower.

See updates on: 10/23/13 10:59 AM



80 Guides

A Technical Series 8 Issues



Holder, Beneficiaries and Backup Grantees

Defining Roles and Relationships to Achieve Conservation Easement Objectives



A conservation easement may have one or more holders responsible for upholding the easement's conservation objectives. It may have a beneficiary, an entity with some rights to manage the easement for fulfillment of its conservation objectives but no responsibility to do so. It may also provide a contingency plan to replace a holder in the event the holder cannot or will not perform its duties. Effective long-term easement management requires that when more than one entity shares easement management rights, the relationship between the entities must be carefully delineated.

- Introduction 1**
- Relationships 1**
- Easement Holder 2**
- Easement Holder's Relationship to the Land 3**
- Easement Holder's Relationship with Landowner 3**
- Multiple Holders 3**
- Holder Agreement 3**
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Related Resources at ConservationToolbox 13

Introduction

By its nature, every conservation easement needs an easement holder—a land trust or government unit that, in accepting the grant of an easement, takes responsibility for proper easement management. Not everyone seeking to conserve a property needs to be an easement holder to assure that their interests, and the conservation objectives of the easement, will be met. The interests of a holder or other crucial conservation partner often may be protected by making them an easement beneficiary or backup grantee; the relationship between holder and beneficiary or backup grantee may be simpler to manage, more cost-effective and less prone to misunderstandings than the alternative of having each partner serve as a holder. If, however, there is a compelling reason to grant the easement to more than one holder, the holders need to carefully consider and arrange how they will interact with one another to fulfill their easement management responsibilities.

Relationships

Land conservation is based on relationships, the most important being the relationship of the landowner to the land. "Quoting Aldo Leopold, "when land does well for its owner, and the owner does well by his land, when both end up better by reason of their partnership, we have conservation."

Last updated on: 01/10/13 10:18 PM



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Traditional Neighborhood Development
Transfer of Development Rights
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Local Regulation for Historic Preservation
Steep Slope Ordinance
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Public Dedication and Fees-in-Lieu for Parks & Recreation
Tree Ordinance
Lighting Ordinance
Sign Ordinance
Street and Sidewalk Design
Traffic Calming
Zoning for Non-Commercial Solar and Wind Systems
Planning & Land Use Ordinance Basics

Acquiring Land & Easements

Purchase Options: Gaining the Right Without the Obligation to Acquire Property Interests
Options to Sell
Right of First Purchase (Offer, Negotiation or Refusal)
Reserved Life Estate
Mortgage Subordination
Reversionary Interests
Authorization of Real Estate Transactions: Rules and Processes for Nonprofits
Management of the Document Preparation Process

COMPLETED GUIDES

Closing: Finalizing the Real Estate Transaction
Model Conservation Easement
Model Legal Documents
Conservation and Preservation Easements Act
Riparian Buffer Protection Agreement
Costs of Due Diligence in Conservation Acquisitions
Costs of Conservation Easement Stewardship Holders, Beneficiaries and Backup Grantees: Defining Roles and Relationships to Achieve Conservation Easement Objectives
Who Has Standing? Conservation Easements in Pennsylvania Courts

Financing Conservation

Pledges and Donation Agreements
Introduction to Stewardship Funding Arrangements: Alternatives for Landowners to Help Holders Meet Conservation Easement Obligations
Legal Considerations for Stewardship Funding Arrangements: Binding Present and Future Owners to Present Promises
Conservation Referendum
Donation by Will
Seller Take Back Financing
Installment Agreement
Bridge Loans for Conservation Purchases: Borrowing from Revolving Loan Funds

Landowner Incentives

Reducing Pennsylvania Inheritance Tax
Reducing Federal Estate Tax
Clean and Green (Preferential Assessment)

11/5/13

Agricultural Conservation Easement Purchase Program
Agricultural Security Areas
Audubon at Home

Land Stewardship & Property Management

Public Access Policies and Practices for Land Trust Lands: Survey Results in Pennsylvania
Reducing Liability Associated with Public Access
Recreational Use of Land and Water Act
Invasive Species Management Programs
GPS (Global Positioning System)

Conservation Benefits & Challenges

Economic Benefits of Biodiversity
Economic Benefits of Land Conservation
Economic Benefits of Parks
Economic Benefits of Smart Growth and Costs of Sprawl
Economic Benefits of Trails
Biodiversity
Impacts of Natural Land Loss on Water Quality

Research & Education

Poll Results: The Public's View of Conservation
Environmental Advisory Councils
Pennsylvania Land Choices
Prioritization of Conservation Resources
Pennsylvania Natural Heritage Program
Important Bird Areas
Plant Stewardship Index
Cost of Community Services Studies
Build-Out Analysis
Community Visioning

CommunityViz
Walk for Wellness
Development Threat Analysis
Planning a Site Visit with Your Legislator

Managing Organizations

Mergers
Collaborative Opportunities for Land Trusts
Commission-Based Compensation for Fundraising
Elections and 501(c)3 Organizations
Lobbying Rules and 501(c)3 Organizations
Land Trust Accreditation
Land Trust Standards and Practices

Recreation & Community Development

Multi-Municipal Partnerships for Parks
Creating Sustainable Community Parks

COMING SOON!

Riparian Buffer Protection via Local Regulation
The Science Behind Riparian Buffer Protection



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ASSOCIATION

11/5/13

CONSERVATION TOOLS .ORG



The screenshot shows the website's header with a search bar, navigation menu, and main content area. The navigation menu includes: HOME, GUIDES, MODEL DOCUMENTS, LIBRARY, EXPERTS, EVENTS, GLOSSARY, and CONSERVATION ORGANIZATIONS. The main content area features a large heading: "Match conservation and land use planning tools to your needs." Below this, there are three columns of information:

- Shortcuts to Guides:** A list of guide categories including Land Use Ordinances & Development Standards, Acquiring Land & Easements, Financing Conservation, Landowner Incentives, and Land Stewardship & Property Management.
- Find summary and in-depth guidance on 80 topics.** A paragraph encouraging users to browse library items, find experts, and list themselves as experts.
- Site Updates:** A list of recent updates to guides, such as "Biodiversity: A Guide" and "Authorization of Real Estate Transactions".

At the bottom of the screenshot, there is a "Featured Resources" section.

Guides
Updating every 8 weeks

Beneficiaries and
Antees

and the relationships to Achieve
Prezi

ment's conservation objectives. It
of the conservation objectives list



PENNSYLVANIA LAND TRUST ASSOCIATION

75 conservation organizations

(represented by the Land Trusts in PA)

Conservation organizations are not pleased with the current state of public policy. They are working to improve the current state of public policy and to ensure that the public good is protected.



Improve Public Policy



Advocate for better policy

- Public policy is the result of decisions made by government officials.
- Public policy can be improved by advocating for better policy.

Maintain positive policy agenda

- Public policy is the result of decisions made by government officials.
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- Person-to-person assistance
- Conservation Easement Assistance Program
- Technical Assistance Program grants





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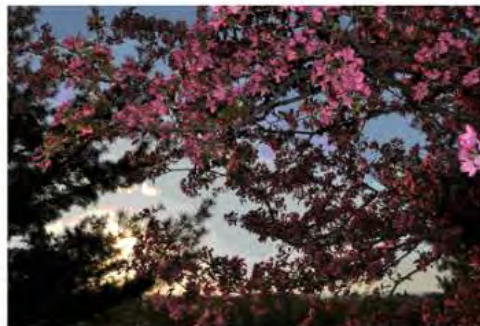
Jobs

Blog

Language and Culture: Why Environmentalists Need to Control the Language of Environmentalism
by dgardner3

Language defines a culture. Those who control the language control the culture. The context of a word defines whether it is viewed as good or bad, a label to be proud of or feel shame for. As En...

The Four Horsemen of the Apocalypse – Environmental Destruction of Our Own Making?



New Conference Session: \$ for Conservation - Accessing Act 13 Funds

How can conservation benefit from new funding sources established through Act 13 (the new "Marcellus shale law")? How will existing conservation funding be impacted?

Economic Impact of Pennsylvania State Parks

A 2011 report shows Pennsylvania state parks serve as economic generators in the communities that surround them, tying our natural resources to the Commonwealth's economic vitality.

LTA Webinar: Oil and Gas CAN Work with Conservation Easements - Sometimes

Oil and gas exploration can sometimes be compatible with conservation easements, but the land trust and landowner need to be able to impose

PA Headlines

Board to support nature preserve

04-20-2012 - Reading Eagle

Dept. of Ag: Preservation Board Protects Nearly 2,200 Acres of Prime PA Farmland

04-19-2012

Gas drilling disputed on farm home to bats

04-19-2012 - Pittsburgh Post-Gazette

Federal well site waste rules find few fans

04-19-2012 - Pittsburgh Tribune-Review

More land donated to the Joseph E. Ibberson Conservation Area

04-19-2012 - Harrisburg Patriot-News

DEP citing company after drilling mud leaks into creek

04-19-2012 - Uniontown Herald-Standard

Resident warns Doylestown Twp. against paying for easement on supervisor's land

04-19-2012 - Lehigh Valley Intelligencer

State parks bracing for budget cuts

04-19-2012 - Somerset Daily

ConserveLand

Fall 2013

A Publication of the Pennsylvania Land Trust Association

Get Outdoors PA: Connect & Inspire Your Community

ClearWater Conservancy does it. So does Countryside Conservancy, Wild-



lands Conservancy has been doing it for decades. Land trusts across Pennsylvania are not just providing conserved places to visit but are actively engaging people in outdoor activities such as hiking, kayaking, bird watching and more.

Get Outdoors PA makes it easier for land trusts to develop and market their outdoor programming. Get Outdoors PA has been around for years, offering thousands of recreation programs in Pennsylvania's state parks and forests. Now the program is expanding to include private, county and municipal programs.

Get Outdoors PA flagship partners, Department of Conservation & Natural Resources (DCNR) following the resignation of Rick Allan. Ferretti has served as Deputy Secretary for Parks and Forestry since June 2011.



Ellen Ferretti Named Acting DCNR Secretary



Prior to joining DCNR, Ferretti served as the vice president of the northeast regional office of the Pennsylvania Environmental Council; director of Environmental Resources at Barton-Lawson Engineering Services, Inc.; and was a former board member of North Branch Land Trust. She holds a B.S. in Environmental Science/Biology from Wilkes College in Wilkes-Barre.

"I've spent many years working with the land trust community in Northeastern PA and look forward to now working with the Pennsylvania Land Trust Association (PALTA) and all the land trusts across the Commonwealth. Not only is the work of the land trust community so valuable, but the commitment of everyone involved, from staff to volunteers to landowners who want to conserve their land - it is inspiring! I applaud PALTA for the valuable work they do and look forward to meeting all of their members."

"The purpose of conservation: the greatest good to the greatest number of people for the longest time."
- Pennsylvania Governor, Gifford Pinchot (1923-1927, 1931-1935)

PENNSYLVANIA LAND CONSERVATION CONFERENCE





- Person-to-person assistance
- Conservation Easement Assistance Program
- Technical Assistance Program grants



PENNSYLVANIA LAND TRUST ASSOCIATION

75 conservation organizations

Conservation organizations in Pennsylvania are working to protect the state's natural resources and provide recreational opportunities for all Pennsylvanians. The Pennsylvania Land Trust Association is a non-profit organization that provides technical assistance and advocacy to these organizations.



Improve Public Policy



Advocate for better policy

Monitor private sector activity

Build Tools for Excellence & Efficiency



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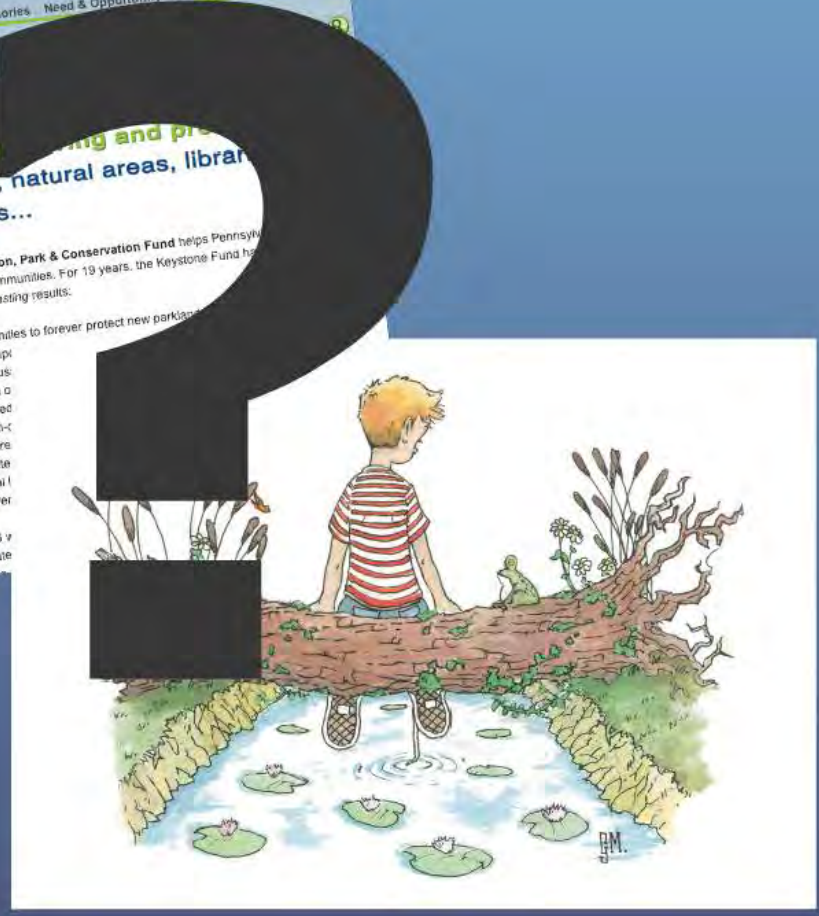


Conservation tools case

Conservation tools case



The Future





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