Building New and Improved Models for Conservation

In 2019, the Pennsylvania Land Trust Association introduced a new model legal document, produced for public review the draft of a new model, and released major new editions of two models.

Model Permission for Encroachment (new model)

PALTA published the *Model Permission for Encroachment* to provide organizations with a tool for permitting a neighbor to continue encroaching on their land without the organization risking loss of ownership through adverse possession or incurring liability due to injuries or property loss. This short and simple document is two pages including signature lines.

Model Release of Liability Form, 2nd edition

PALTA refreshed the *Model Release of Liability Form* (1st edition, 2014), adding three new provisions to the core protections provided to activity sponsors against claims of personal injury: (1) emergency first aid and medical release, (2) photo and video permission, and (3) protection from claims of personal property loss. The new edition also contains a few other miscellaneous improvements. Users are encouraged to adopt the new model immediately.

Model Amendment (public review draft)

If changes to a conservation easement granting document are necessary or desirable, the easement holder must decide whether to amend and restate the document in full or to amend without restatement. The *Model Amendment of Grant of Conservation Easement and Declaration of Covenants* is intended for use when the easement holder’s decision is to amend without restatement.

PALTA posted a draft of the model and commentary for public review in December; finalization will occur in 2020.

Model Access Easement for Environmental Stewardship (2nd edition)

PALTA published the second edition of the *Model Access Easement for Environmental Stewardship* after completing a public review process begun last fall. The first edition of
the model (entitled *Water Quality Improvement Easement*) was completed in 2005 and developed solely for the purpose of securing long-term access to property for remediating the effects of abandoned mine drainage (AMD). The second edition retains AMD treatment as the project type directly addressed in the model. However, the model’s provisions were modified to facilitate customizations of the model for other types of environmental stewardship projects. The model also was updated to reflect changes in state law and received a variety of miscellaneous improvements.

**Change to 6.04(a) of Model Grant of Conservation Easement and Declaration of Covenants**

Tax court litigation caused PALTA to review the process set forth in the *Model Grant of Conservation Easement and Declaration of Covenants* regarding the easement holder’s review of landowner proposals that are subject to review. After two rounds of public review, PALTA finalized a revision to section 6.04. PALTA also revised the commentary to 6.04 and expanded commentary regarding other subjects including tents and camping and addressing fossil fuel infrastructure.

**Creating New and Improved Guidance**

**PALTA Produces 17 New Guides**

PALTA published 17 new guides in 2019. Many of the guides are short as compared to guides of previous years, providing a carefully selected and organized set of links to useful resources on the guide’s topic with additional information to help the reader make sense of the material. They represent a new ConservationTools.org on developing guides that increase the breadth of useful guidance at the site by pointing to and curating content that has already been done well elsewhere (and not reinventing it). A brief description of each guide’s topic is provided below.

**Solar Energy Development and Land Conservation**

An enormous boost in solar energy production is one of the actions needed to help stop the dramatic rise of carbon in the atmosphere and better ensure civilization’s long-term prospects. This guide explores issues that conservationists may want to consider in order to both advance their land conservation work and support solar energy development. (5 pages)

**Purchase and Sale Agreements for Conservation Projects: Guidance and Sample Provisions**

Acquisitions of land and easements for conservation purposes can involve issues different from other real estate transactions. This guide looks at purchase and sale agreements in general and then reviews potential customizations that may be made to these agreements to specifically address conservation matters. (9 pages)

**Overview of Pennsylvania’s Recreational Use of Land and Water Act**

The Act limits the liability of property owners who open their land for public recreation, providing them protections against claims of personal injury and property loss.
PALTA updated its expansive guide to the Act as noted below. It created this new guide as a concise, easily digestible introduction to the same topic.

**Permits for Events, Hunting, Camping, and Other Uses of Conserved Lands**

Requiring permits for certain activities on conservation lands (such as events, hunting, and camping) helps land managers ensure that the activities do not negatively impact the land or others’ enjoyment of it. The permit-application process can also serve to inform users of the rules for using the land.

**Encroachment: Permitting Continued Use Without Risking Loss of Ownership**

What should you do if a neighboring landowner encroaches on your organization’s property (e.g., builds a shed or extends their lawn) or otherwise uses the land without permission? Sometimes immediately booting them is the best answer; sometimes arriving at some accommodation that provides them with at least temporary permission makes more sense. Doing nothing invites trouble.

**Green Burial**

Green burials minimize negative environmental impacts by using biodegradable materials, avoiding toxic chemicals, and occurring on land maintained using good conservation practices.

**Prescribed Fire**

A prescribed fire is a planned fire—sometimes called a controlled burn—used to manage certain types of landscapes. It reduces the chance of major wildfires and provides numerous other benefits for humans, plants, and wildlife.

**Volunteers: Guidance for Recruiting, Training, Managing, and Retaining Unpaid Workers**

Effectively recruiting, training, managing, and retaining volunteers can play a crucial role in helping a nonprofit organization accomplish its goals.

**Hiring and Managing Interns**

Interns can help nonprofit organizations to cost-effectively accomplish more. They also present a pathway for the organization to cultivate potential future employees and introduce new people to the field.

**Effective Nonprofit Newsletters**

Effective email newsletters help nonprofits better publicize their work and connect with supporters.

**Nonprofit Name Change**

Sometimes it makes sense for a nonprofit to change its name to better reflect its mission and work, distinguish itself from other organizations, or otherwise improve its marketing.

**Working with Nature to Manage Stormwater**

The most effective tools to reduce the water pollution and flooding caused by stormwater runoff are green infrastructure, land conservation, and best management practices on farms.

**Succession Planning for Nonprofits**

The unexpected departure of a nonprofit’s leader can cause organizational chaos. A nonprofit may establish policies and procedures to guide leadership transitions—unplanned and planned—to prevent damage to the organization and its work.
Community Gardens
This guide links to resources that: help people successfully start and manage community gardens; inform governments on how they can encourage gardens; and guide organizations on permanently protecting gardens.

Planned Giving
Planned giving programs play an important role in charitable fundraising.

Climate Change and Land Conservation
Land trusts and governments may tailor their land conservation work to help both reduce carbon in the atmosphere and mitigate the harm of climate change.

Don’t Regulate Rooftop Solar Without Compelling Cause
Regulating rooftop solar energy systems through municipal zoning ordinances results in fewer people powering their homes and businesses with clean, safe, renewable energy. Furthermore, common arguments for regulation do not hold water.

PALTA Refreshes 17 Guides
In 2019 PALTA updated 17 guides—twelve of which dated back a decade—to improve their utility and ensure they remain relevant. All of PALTA’s guides originally completed in 2010 or earlier have now been refreshed (42) or retired (2). The titles of the newly updated guides are provided below, some accompanied with development notes.

Guide to Pennsylvania’s Recreational Use of Land and Water Act: A Law Limiting the Liability of Those Who Open Their Land to the Public
The General Assembly’s 2018 amendment of the law necessitated the update, and the opportunity was taken to more thoroughly improve the guide.

Pre-Existing Mortgages in Easement Transactions: Using Non-Disturbance and Subordination Agreements to Prevent Extinguishment and Comply with Tax Law
If you do conservation easement work and ever deal with pre-existing mortgages, IT’s IMPERATIVE that you review this guide. Much guidance regarding mortgages and easements is... deficient.

Release of Liability Form: A Tool to Reduce the Risk of Claims for Personal Injury or Property Loss
User interest in adding bells and whistles to the first edition of the model form and the General Assembly’s 2018 amendment to the Recreational Use of Land and Water Act motivated the update, and the opportunity was taken to much more thoroughly improve the guide.

Reducing Federal Estate Tax: A Conservation Easement Benefit for Large Estates

Local Land Use Planning and Controls in Pennsylvania

Street and Sidewalk Design

Floristic Quality Assessment

Sign Ordinance
We judged the Montgomery County Planning Commission’s 2015 sign ordinance work as superior in content and utility to PALTA’s 2009 guide. Thus, we chose to discard PALTA’s original guide and replace it with a guide focusing on links to quality resources including the Commission’s.

**Steep Slope Ordinance**

**Land Trust Accreditation**

**Community Visioning**

**Elections and 501(c)(3) Organizations**

**Conservation by Design**

**Seller Take Back Financing**

**Transfer of Development Rights**

**Urban Growth Boundary**

The original 2009 guide was replaced in its entirety for this edition, which reflects in part that UGBs have not been terribly successful in PA.

**Zoning for Solar and Wind Energy Systems**

**Research and Analysis**

Among the various matters investigated by PALTA in the past year was the possibility of land trusts and other NGOs playing a role in facilitating the development and implementation of conservation plans for farms. The results of the research and analysis were published in the report “Pathways Toward Increased Land Trust Involvement in Agricultural Conservation Planning and Implementation.”

**Connecting, Educating, and Inspiring People**

**Pennsylvania Land Conservation Conference**

PALTA’s annual Pennsylvania Land Conservation Conference is Pennsylvania’s premier networking, training, and inspirational event for those involved with private and public land conservation. The three-day event brings together land trust professionals and volunteers; municipal officials; state agency staff; attorneys, planners, and other professionals from across Pennsylvania and beyond.

<table>
<thead>
<tr>
<th><strong>2019 Conference Highlights</strong></th>
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<tbody>
<tr>
<td><strong>May 16-18 at Skytop Lodge in the Poconos</strong></td>
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<tr>
<td>356 individuals in total attended.</td>
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<tr>
<td>141 were first-timers.</td>
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<tr>
<td>48 attended as part of the Environmental Advisory Council Network Conference.</td>
</tr>
<tr>
<td>The average participant attended for 1.8 days (a record high).</td>
</tr>
<tr>
<td>Attendees rated the conference a 4.4 out of 5 overall.</td>
</tr>
<tr>
<td>Instructors delivered 111.5 course hours in total.</td>
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Greenways and Trails Summit
The PA Greenways & Trails Summit is Pennsylvania’s premier event for those involved in trail and greenway development. In 2019, PALTA took responsibility for organizing and managing this biennial networking, training, and inspirational event.

2019 Summit Highlights
September 22-24 at Shippensburg University in Cumberland County
262 individuals in total attended.
116 attended all three days.
Attendees rated the summit a 4.3 out of 5 overall.

Other PALTA Events, Courses, and Presentations
Other PALTA organized or sponsored events in 2019 included but weren’t limited to the following:

Land Trusts and Farmland Roundtable
43 individuals engaged in this 4.5-hour roundtable discussion about farmland preservation and other farm-related work by land trusts. The event was held April 3 at the Brandywine Conservancy.

Pennsylvania Association of Environmental Educators Annual Conference
PALTA sponsored, exhibited, addressed the plenary session, and introduced the keynote speaker at this March 18 – 19 event.

Delaware River Watershed Land Protection Group
PALTA led and facilitated three in-person gatherings of the Delaware River Watershed Land Protection Group in 2019 in February, July, and November. The group is made up of land protection and stewardship staff of organizations conserving land in the Delaware River Watershed.

Directly Assisting Organizations and People

One-on-One Assistance
During 2019, PALTA staff directly assisted dozens of organizations with their questions and problems via telephone and email as well as in person. Whether a matter took seconds, minutes, or days to resolve, no issue was left unaddressed.

Fostering Peer Relationships

Environmental Advisory Council Network
PALTA continued its management of the EAC Network to support environmental advisory councils and those who seek to create new EACs. 2019’s activities included organizing the EAC Network Conference, facilitating strategic planning, updating the EAC database, and engaging in regional events.
Land Stewardship Network
PALTA facilitates the Land Stewardship Network—land trust staff and volunteers involved in land stewardship—to promote the sharing of ideas, experiences, and knowledge. PALTA provides the dozens of participants with an online platform to post questions and share resources and hosts calls to discuss specific topics.

Mentorship Program
PALTA continued its Conservation Professionals Mentorship Program (started in 2017) with four mentor-mentee pairs supported over the course of the year. People interested in mentoring or being mentored can reach out to info@conserveland.org to facilitate connections at any time.

Conservation Easement Assistance Program
The Conservation Easement Assistance Program (CEAP) helps increase the quantity of special places protected as well as improve the quality and long-term viability of easements. In 2019, PALTA made 18 grants totaling $106,302.17, providing organizations the means to use best practices in their easement projects:

- 15 grants to complete new easement projects
- 1 grant to amend and restate older easement documents
- 1 grant to upgrade baseline documentation
- 1 grant for the signs on eased properties

Typical expenses covered by the grants include survey, baseline documentation, legal review, and staff costs. The average grant amount was $5,906.

Since 2004, CEAP has helped create 283 new easements protecting 23495 acres in 35 counties. For these projects, landowners donated $54.4 million in easement value and land trusts secured $1.99 million for stewardship.

Trail and Greenway Grants
The Pennsylvania Land Trust Association awarded grants to six organizations to deliver educational programming and training in regards to trails and greenways. 381 individuals participated in the grant-supported events:

The Pennsylvania Land Trust Association also awarded a $9,437.99 grant to support the trail work of the Mid-State Trail Association in association with the selection of the Mid-State Trail as the 2019 trail of the year.

The trail-related grants are made possible through funds provided to DCNR by the Federal Highway Administration.

Mapping and Analysis
Open Space Referenda Analysis
PALTA used its Conserved Land data and GIS to investigate the quantity of open space—protected and unprotected—in municipalities that have passed of open space referenda in Pennsylvania. The resulting report was received with great interest by land protection staff working in eastern Pennsylvania and is available upon request.
Comprehensive, Interactive Map of Protected Lands

PALTA assembled an incredible mass of data and with it launched Pennsylvania’s first-ever comprehensive, interactive GIS map of publicly and privately conserved lands in 2018. The map is accessible from the “Maps & GIS” tile on the ConservationTools.org homepage.

In 2019, PALTA made substantial updates and refinements to the newly established database, respecting the original project goal of keeping the data fresh and of maximum utility over time. This work will continue into 2020 and beyond.

The conserved land database has been rapidly adopted by government agencies, nonprofits, and businesses across the Commonwealth. The state GeoBoard has recognized it as Pennsylvania’s official basemap of protected land. Among its uses, the dataset is now integrated into PNDI’s Conservation Explorer tool and has helped solar companies avoid conserved land when siting solar farms.

Prioritizing Sites for Riparian Forest Plantings

PALTA used GIS to identify and rank potential riparian planting sites in Pennsylvania on their ability to improve water quality. The aim was to figure out the most cost-effective locations for planting trees to maximize water quality gains. ESRI published an article on PALTA’s work in the Fall 2019 issue of ArcUser.

Analyzing Pennsylvanians’ Access to the Outdoors

PALTA contracted with the Trust for Public Land to determine 10-minute walk and drive “service areas” for parks, publicly accessible open space, and land/water trail access points in Pennsylvania. The analysis when appropriately applied helps identify who in Pennsylvania lacks sufficient access to outdoor recreational opportunities. The results provide a core component of the pending new edition of the Commonwealth’s Statewide Comprehensive Outdoor Recreation Plan.
Finding Land Trusts, Watershed Associations, EACs, and Trail Groups

PALTA expanded, refreshed, and refined the content supporting the Group Finder page at ConservationTools.org. The page serves as a gateway for finding more than 500 organizations across Pennsylvania, identifying their service areas, and conducting geospatial analysis of how their service areas intersect with other service areas, watersheds, legislative districts, etc.

The improvements included a new, basic tool for finding trail groups across Pennsylvania. The tool’s purpose is to help people connect with trail groups (as contrasted with sites designed to help the public find trails to use).

New Dataset: Stream Order

The National Hydrography Dataset (NHD) models streams nationwide. PALTA expanded Pennsylvania’s portion of the NHD by adding Strahler stream order as an attribute. PALTA’s expansion allows joins with other stream datasets built off the NHD, such as the PA DEP’s attaining and non-attaining streams. The new dataset is available for download by visiting pasda.psu.edu and selecting “Pennsylvania Land Trust Association” under “Search by Data Provider.”

Making News and Information Easily Accessible

PALTA Websites Deliver the News Every Weekday
With updates made every weekday, PALTA’s ConserveLand.org and GreenwaysAndTrails.org continued to be the places to go to find land conservation and trail news respectively in Pennsylvania.

E-Newsletters
The frequency and timing of PALTA’s e-newsletters, which each reach 2,500 to 3,000 people, varies, governed primarily by the rate at which PALTA staff identify or develop items worth reporting.

ConserveLand Updates report on matters impacting conservation statewide.

Pennsylvania Greenway & Trail News reports what’s happening regarding greenways and trails in Pennsylvania.
Project & People News reports on land conservation projects and the people working and volunteering in conservation.

Social Media
PALTA continued posting regularly on social media, sharing conservation-related news and resources while steadily growing the size of its audience on Facebook, Twitter, and Instagram. At the end of 2019, PALTA had roughly 4,600 followers across the three platforms, a 31% increase over the prior year.

Recognizing and Promoting Conservation Excellence

Lifetime Leadership Award
PALTA presented its 16th Lifetime Conservation Leadership Award to Troy Firth, the founder of the Foundation for Sustainable Forests and leader in sustainable forestry.

Government Leadership Award
PALTA presented its 2019 Government Conservation Leadership Award to Stroud Township, Monroe County for its outstanding work in protecting open space for recreation, wildlife, and water quality.

Protecting $78 Million in Environmental Investments!
PALTA successfully led Growing Greener Coalition efforts to push back proposals in Harrisburg to slash $78 million from state investments in open space protection and other environmental projects. The hard work and tenacity of PALTA and its allies over many months resulted in the elimination and reversal of the cuts before year’s end. The impact of the successful campaign is huge. Harrisburg will inject $78 million more into projects that conserve land, protect water, and achieve other environmental benefits than otherwise would have occurred in the absence of PALTA-led efforts.

Laying the Foundation for Better Public Policy

Outreach to Public Officials
As part of its ongoing, proactive outreach—above and beyond lobbying for specific legislative actions—PALTA staff held several dozen meetings with legislators in 2019 to educate them generally on land conservation and the work of land trusts.

PALTA thanks conservation leaders who took the time to meet with their local legislators, either in their districts or with PALTA staff in Harrisburg. Helping policy makers understand conservation matters and the people advocating for conservation
greatly improves the likelihood that, when a legislative issue arises, they will pay attention to the concerns and requests of conservationists when making decisions.

**Growing Greener Coalition**

In mid-2018, PALTA took on the responsibility of managing a reboot of the Growing Greener Coalition. The reboot, which was completed in 2019, included a thorough reworking of the coalition’s structure, composition, principles, and operating rules, as well as its strategies and approaches to increasing state conservation investments. The mission of the renewed coalition, which is looking at a multi-year campaign for boosting state conservation investment as it addresses current threats and opportunities to state investments is:

- to ensure the health, prosperity, and security of people everywhere in the Commonwealth by advocating for public investment in cost-effective, nature-based solutions for safeguarding our drinking water, cleaning up our rivers and streams, and reducing flooding; conserving the lands necessary for protecting wildlife, sustaining farm economies, and supporting other community needs; and providing for outdoor recreation.

**Charitable Conservation Easement Program Integrity Act**

PALTA produced an op-ed that advocates for preventing investors from excessively profiting off the tax code and potentially defrauding the U.S. when investing in conservation projects that use conservation easements. Versions were published in news outlets including the *Express-Times* (*lehighvalleylive.com*) and the *Citizens’ Voice* (*Wilkes-Barre*).

**Leadership and Advisory Roles**

PALTA staff partnered with others and advanced conservation issues of shared interest by serving on leadership and advisory bodies ranging from the national Land Trust Leadership Council to the State Outdoor Recreation Plan Advisory Committee and Governor’s Green Ribbon Task Force on Forest Products, Conservation and Jobs.

**Other Outreach**

PALTA engaged in a multitude of outreach and education efforts to promote conservation—from displaying banners highlighting the numerous benefits of the Keystone Recreation, Park and Conservation Fund at the Capitol to developing editorial cartoons. An example of the latter closes out this report.
### Pennsylvania Land Trust Association

#### 2019

**Board of Directors**
- Kim Murphy, president
- Oliver Bass, vice president
- John Conner, treasurer
- Tom Saunders, secretary
- Chris Beichner
- Renée Carey
- Ellen Ferretti
- Steven Schiffman
- Kyle Shenk
- Jeff Swinehart
- Phillip Wenger

**Staff**
- Andy Loza, executive director
- Nicole Faraguna (thru August), director of advocacy & events
- Carol Grayshaw, project & office coordinator
- Nate Lotze, director of communications
- Joshua VanBrakle, GIS specialist
- Sara Painter (from May onward), director of outreach & dev.
- Emily Best (from Nov. onward), director of advocacy

**Policy Advisory Committee***
- Kevin Abbey
- George Asimos
- Cynthia Carrow
- Brenda Costa
- Jim Engel
- Jim Finley
- Bill Gladden
- Brian Gallagher
- John Goodall
- Kathie Gonick
- Dawn Gorham
- Sean Kenny
- Kristine Kern
- Chris Kocher
- Jeff Marshall
- Deb Nardone
- Andy Pitz
- Pat Pregmon
- Ron Ramsey
- Diane Rosencrance
- Sally Zaino

* at-large members as of 12/31/19

### Voting Member Organizations

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<thead>
<tr>
<th>Allegheny Land Trust</th>
<th>North American Land Trust</th>
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<tr>
<td>Allegheny Valley Conservancy</td>
<td>North Branch Land Trust</td>
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<tr>
<td>Allegheny Valley Trails Association</td>
<td>Northcentral Pennsylvania Conservancy</td>
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<td>Appalachian Trail Conservancy</td>
<td>Open Land Conservancy of Chester County</td>
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<tr>
<td>Armstrong County Conservancy Charitable Trust</td>
<td>Pennsylvania Land Trust</td>
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<tr>
<td>Armstrong Trails</td>
<td>Pennsylvania Recreation &amp; Park Society</td>
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<tr>
<td>Audubon Society of Western Pennsylvania</td>
<td>Pennypack Ecological Restoration Trust</td>
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<tr>
<td>Berks Nature</td>
<td>Pine Creek Land Conservation Trust</td>
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<tr>
<td>Brandywine Conservancy</td>
<td>Pine Creek Valley Watershed Association</td>
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<tr>
<td>The Buck Hill Conservation Foundation</td>
<td>Pocono Heritage Land Trust</td>
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<tr>
<td>Central Pennsylvania Conservancy</td>
<td>The Radnor Conservancy</td>
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<tr>
<td>Centre County Farmland Trust</td>
<td>Regional Trail Corporation</td>
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<td>Chestnut Hill Conservancy</td>
<td>Schuylkill County Conservancy</td>
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<tr>
<td>ClearWater Conservancy</td>
<td>Schuylkill River Greenways National Heritage Area</td>
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<tr>
<td>The Conservation Fund, Pennsylvania Office</td>
<td>Somerset County Conservancy</td>
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<tr>
<td>Countryside Conservancy</td>
<td>Tincum Conservancy</td>
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<td>Delaware Highlands Conservancy</td>
<td>The Wallace Trust</td>
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<td>Earth Conservancy</td>
<td>Western Pennsylvania Conservancy</td>
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<tr>
<td>Eden Hill Conservancy</td>
<td>Westmoreland Conservancy</td>
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<td>Edward L. Rose Conservancy</td>
<td>Westmoreland Land Trust</td>
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<tr>
<td>Evergreen Conservancy</td>
<td>West Pikeland Land Trust</td>
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<tr>
<td>Farm and Natural Land Trust of York County</td>
<td>Wild Waterways Conservancy Inc.</td>
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<tr>
<td>Foundation for Sustainable Forests</td>
<td>Wildlands Conservancy</td>
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<tr>
<td>Fox Chapel Land Conservation Trust</td>
<td>Willistown Conservation Trust</td>
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<tr>
<td></td>
<td>Wissahickon Trails</td>
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PALTA's strategic plan and other information are available at ConserveLand.org