

2012 DETAILED AGENDA

DAY 1 – Wednesday, February 22nd

8:30AM – 4:30PM

ADVOCATING FOR SUCCESS (RESTRICTED)

Lynne Sherrod, Western Policy Manager, Land Trust Alliance

Everyone advocates for something. Are you effective, and is it time well spent? This highly interactive course will aid in understanding the political and cultural climate which provides opportunities and challenges for the cause of land protection and addresses the “how” and “why” it can be incorporated into your overloaded schedule. It will also address cultivating and maintaining effective relationships with both policy makers and the media. You will leave armed with a personalized organizational action plan and the necessary skills for advocacy and organizational messaging conducive to conservation initiatives at the local, state and national level. Case studies from across the country will help shed light on real life examples about what works, what doesn’t and why.

12:00PM – 1:00PM

LUNCH

1:00PM – 4:30PM

DRAFTING SOUND EASEMENTS

Burgess Jackson, Attorney at Law, Law Offices of Burgess Jackson

Thomas Hall, Senior Attorney, Braun & Gresham PLLC

As IRS scrutiny of conservation easements continues, land trusts and landowners must be vigilant about drafting sound conservation easements that meet the requirements of the IRS code and that will meet the test of perpetuity. This in depth session will cover the principles of sound easement drafting, provide practical and legal information about drafting easements, as well as cover examples of CEs that wound up in litigation with landowners primarily due to poor drafting. This session will also cover the technical rules that must be followed to insure that the IRS does not deny the conservation easement deduction.

5:00PM – 6:30PM

WELCOME RECEPTION WITH EXHIBITORS

DAY 2 – Thursday, February 23rd

8:30AM – 10:00AM

WELCOME ADDRESS & GENERAL SESSION I

10:00AM – 10:30AM

MORNING BREAK WITH EXHIBITS

10:30AM – 12:00PM

BREAKOUT 1

Track 1: Organizational Development & Capacity Building Executive Director and Board Chair Roundtable (Restricted)

Lori Olson, Executive Director, Texas Land Trust Council

Shannon Meyer, Western Conservation Manager, Land Trust Alliance

This is an exclusive opportunity for land trust executive directors and board chairpersons to discuss roles, needs, challenges and opportunities with the Texas Land Trust Council and the Land Trust Alliance. Specific programmatic activities and future plans will be discussed. This meeting will serve as the kickoff to an ongoing conversation among all Texas land trusts aimed at fostering enhanced collaboration and cooperation.

Track 2: Conservation Tools: Implementation & Strategies

What Land Trust Professionals and Conservation Easement Donors Need to Know About the Appraisal Process

James J. Jeffries, Appraiser, Jeffries Appraisal Services

This session will cover some of the unique requirements that the Internal Revenue Service places on the appraiser and how these requirements can impact the magnitude of the non-cash charitable donation. Topics for discussion will include the required form and content of the appraisal report and what constitutes apparent IRS acceptable (and unacceptable) valuation techniques. Emphasis will be placed on the issue of phased easements and the challenge these present for the appraiser. Also, the appraisal ramifications emanating from the question of whether to include a desired building site in the easement (building envelope) or to leave it out (leave unencumbered) will be discussed.

Track 3: Issues, Innovations & Current Challenges

Keeping Fire on Our Side – Managing Wildlife Habitat Using Prescribed Burning

*Carl Schwoppe, Fire Management Officer – Balcones Canyonlands NWR, United States Fish and Wildlife Service
Glen Gillman, Fire Management Coordinator – Wildlife Division, Texas Parks and Wildlife Department*

Fire management professionals will present information on managing habitats in Texas using prescribed burning techniques. Presenters will provide prescribed burning scenarios and examples, with an emphasis on managing habitat in Texas for threatened and endangered wildlife species. This session will also cover tips for managing landscapes to be fire adapted, reducing impacts from devastating wildfires, benefits from patch burning, and partnership opportunities.

12:00PM – 1:30PM LUNCH

1:30PM – 3:00 PM BREAKOUT 2

Track 1: Organizational Development & Capacity Building

The Ten Stupid Things That Boards Do to Mess Up Their Organizations (and How to Avoid Them)

Illene Roggensack, Third Sector Innovations, Inc.

A lively training and discussion of nonprofit boards and their most pervasive pitfalls in the areas of governance, financial management, planning, fundraising and outreach. Emphasis on this session will be on “highest and best use” of current board members, recruiting and training new board members, and board role and responsibilities in a high-functioning nonprofit. From lack of structure to lack of commitment, this workshop provides insight on effective land trust leadership and how crucial it is to organizational excellence and sustainability.

Track 3: Issues, Innovations & Current Challenges

The Drought

*John W. Nielsen-Gammon, Ph.D., Professor of Atmospheric Sciences, Texas State Climatologist, Texas A&M University
Robert E. Mace, Ph.D., Director of Water & Science Conservation, Texas Water Development Board
Clayton Wolf, Wildlife Division Director, Texas Parks and Wildlife Department*

This session provides a look at the current state of the ongoing drought in Texas. Dr. Nielsen-Gammon, the State Climatologist, will discuss the characteristics of the drought including how it compares to previous Texas droughts, and what he expects for 2012 and beyond. Dr. Mace will discuss the ongoing impact of the drought on surface water and groundwater in Texas. Finally, Mr. Wolf will discuss the impact of the drought upon fish and wildlife resources in Texas.

3:00PM – 3:30PM AFTERNOON BREAK WITH EXHIBITS

3:30PM – 5:00PM

BREAKOUT 3

Track 1: Organizational Development & Capacity Building **Building Land Trust Capacity**

Illene Roggensack, Third Sector Innovations, Inc

This session provides a step-by-step guide for the land trust that would like to have greater impact and feel more secure in its long-term sustainability and viability. Using the guiding principle that “Great systems outlast great people” we’ll discuss readiness for growth, openness to change, capacity building through strategic and action planning, pursuit of programmatic opportunities while building organizational infrastructure, and setting realistic timelines for change and sustainable growth.

Track 2: Conservation Tools: Implementation & Strategies **2012 Public Policy Update and Forum**

Lynne Sherrod, Western Policy Manager, Land Trust Alliance

Shannon Meyer, Western Conservation Manager, Land Trust Alliance

In this session, Land Trust Alliance’s Western Policy Director, Lynne Sherrod, will discuss the current status of LTA’s federal public policy priorities and outline their focus areas for 2012. In particular, this session will discuss the Conservation Easement Tax Incentive, and delve into potential changes to and status of the various federal land conservation programs, including the Farm Bill. This session will include an open Q&A, allowing the land conservation community an opportunity to discuss these issues and programs in detail.

Track 3: Issues, Innovations & Current Challenges **Land Trust Innovations**

Steve Jester, Executive Director, Guadalupe-Blanco River Trust

Todd Votteler, Ph.D., Executive Manager of Intergovernmental Relations and Policy, Guadalupe-Blanco River Authority

Todd Merendino, Ph.D., Manager of Conservation Programs, Ducks Unlimited – Texas

Jennifer Lorenz, Executive Director, Bayou Land Conservancy

Stephanie Prosser, Conservation Land Biologist, Bayou Land Conservancy

Texas land trusts are innovating and discovering new ways to conserve important lands. Bayou Land Conservancy will present their watershed and greenway protection efforts and how they are discovering new ways to view and act on green space protection. The Guadalupe Blanco River Trust will showcase their newly formed partnership that seeks to provide conservation of the wetlands and wildlife of the Guadalupe River system, working in collaboration with Ducks Unlimited, the Guadalupe Blanco River Authority, and the San Antonio Bay Foundation.

6:00PM – 8:00PM

NETWORKING DINNER: OPAL DIVINES

DAY 3 – Friday, February 24th

8:30AM – 9:00AM

GENERAL SESSION II

9:10AM – 10:40AM

BREAKOUT 4

Track 1: Organizational Development & Capacity Building **Building a Development Plan**

David Allen, Principal, Development for Conservation LLC

Nearly 90 percent of all charitable gifts in the U.S. come from individual donors. How do we take appropriate advantage of this in our community while still getting everything else done? David’s practical approach to development planning will help you see how major gift fundraising can not only be integrated into everything else you’re doing, but also become the centerpiece of your fundraising strategy.

Track 2: Conservation Tools: Implementation & Strategies

Strategic Conservation Planning

Jonathon Ogren, Principal, Siglo Group

Mark Steinbach, Ph.D., Executive Director, Texas Land Conservancy

In order to ensure effective, mission-oriented conservation, land trusts must identify specific objectives and work strategically to achieve them. This session will discuss a process for establishing conservation goals, as well as how geographic information system technology can serve as a useful prioritizing tool. Learn how to ensure that your organization's work has a lasting and meaningful impact.

Track 3: Issues, Innovations & Current Challenges

Conservation Easement Challenges, Defense and Stewardship

Burgess Jackson, Attorney at Law, Law Offices of Burgess Jackson

Cathy Howell, Senior Attorney, The Nature Conservancy

Frank Davis, Director of Land Conservation, Hill Country Conservancy

Shannon Meyer, Western Conservation Manager, Land Trust Alliance

With each new conservation easement, land trusts assume the perpetual responsibility to monitor, defend and enforce its terms. This session will cover a variety of topics including: amendments and defending challenges to conservation easements. Discussion will include the challenges of long-term easement stewardship and building an endowment to adequately cover long-term costs, as well as an update on TerraFirma, the Land Trust Alliance's budding conservation easement defense insurance program.

11:00AM – 12:30PM BREAKOUT 5

Track 1: Organizational Development & Capacity Building

Major Gift Fundraising: How to Find and Cultivate Prospects, and the Differing Roles of Staff and Board

David Allen, Principal, Development for Conservation LLC

I know that we need major gift fundraising, but it seems so overwhelming. How do we get started? How do we get our Board involved? David's step-by-step practical approach to identifying and cultivating major donors will help you build your fundraising program for long-term sustainability. Learn how to be intentional in your approach, keep the lines of communication open and professional, and raise more money.

Track 3: Issues, Innovations & Current Challenges

Ensuring IRS Compliance

Cassie Gresham, Principal, Braun & Gresham PLLC

James J. Jeffries, Appraiser, Jeffries Appraisal Services

Burgess Jackson, Attorney at Law, Law Offices of Burgess Jackson

Thomas Hall, Senior Attorney, Braun & Gresham PLLC

Kyle Coleman, Associate, Roberts Law Firm

In order to avoid or defeat an IRS audit, all those working on the conservation easement, baseline report, appraisal and 8283 must follow best practices and understand the Treasury Regulations on conservation easements. A panel of attorneys and appraisers present on recent IRS audits in Texas and lessons learned.