

Conservation Excellence 2009

The Annual Conference of the Colorado Coalition of Land Trusts

March 18 – 20, 2009

WEDNESDAY, March 18th -- *Focus on Conservation Policy*

- Panels and presentations will be in the Urban Ballroom

8:15-9:30 **Networking Breakfast / Registration**

9:30-10:00 **Welcome**

- Ken Mirr, Mirr Ranch Group and President of the CCLT Board
- Jill Ozarski, Executive Director of CCLT

10:00-11:30 **Implementation of 1353**

Staff from the Division of Real Estate and others will present on the implementation of the major reforms of HB08-1353, including certification of easement holders, appraisal review, and the Conservation Easement Oversight Commission. There will also be a presentation regarding the required Department of Revenue forms associated with the conservation easement tax credit process.

- Hollis Glenn, Conservation Easement Program Manager at the Colorado Division of Real Estate
- Chris Jensen, Isaacson Rosenbaum P.C.
- Harold Ovsowitz
- A representative from the Conservation Easement Oversight Commission
- Moderated by Jill Ozarski, CCLT

11:30-12:30 **Update from the Division of Real Estate and Department of Revenue on Enforcement**

Hear representatives from the two agencies tasked with easement oversight discuss their actions in the past year and what can be expected in the year to come.

- Erin Toll, Director of the Colorado Division of Real Estate
- Roxy Huber, Executive Director of the Colorado Department of Revenue
- Moderated by Jill Ozarski, CCLT

12:30-1:30 **Lunch with a special presentation by John Fielder of his upcoming book, "Ranches of Colorado"**

1:30-2:15 **Update on IRS Audits**

Panelists will discuss the status of IRS audits throughout the state, what lessons have been learned, what trends are developing in the state and country, and share experiences of individual landowners.

- Larry Harvey, Larry Harvey P.C.
- Bill Silberstein, Isaacson Rosenbaum P.C.
- Moderated by Dan Pike, Executive Director of Colorado Open Lands

2:15-3:15 **Open Space Funding**

In these economic times, understanding what money is available, from whom, and under what conditions has never been more important. Representatives from state and federal agencies, as well as the private sector, will discuss availability of funding for land conservation.

- Lise Aangeenbrug, Executive Director of Great Outdoors Colorado (GOCO)
- Diane Gansauer, Colorado Division of Wildlife
- Gary Finstad, U.S. Department of Agriculture, Natural Resources Conservation Service
- Brian Ross, Executive Director of Colorado Conservation Trust

3:15-3:30 **Break**

3:30-4:15 **Federal and State Policy Roundup**

Hear an update on the status of the federal tax incentive, including where it is at in the process, what progress has been made, and what all of us can be doing to ensure it is made permanent; at the state level,

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hear about several issues facing the land conservation community, including the habitat stamp, 35 acre exemption rule, property tax classification, and HB09-1014.

- Lynne Sherrod, Western Policy Manager, Land Trust Alliance
- Jill Ozarski, Executive Director of the Colorado Coalition of Land Trusts

4:15-5:00 Conservation Easement Defense

This panel's discussion will focus on issues facing conservation in Colorado, including eminent domain and the transfer of easements from an inactive land trust to a new holder (i.e. "orphan easements"). There will also be a brief introduction to the Conservation Defense Insurance program through the Land Trust Alliance. A longer session will be available on Thursday for more details about insurance.

- Mark Weston, Hunsperger & Weston, Ltd.
- Kathy Roser, Executive Director of La Plata Open Space Conservancy
- Larry Kueter, Isaacson Rosenbaum P.C.
- Moderated by Jessica Jay, Conservation Law P.C.

5:00-7:00 Opening Night Reception

- Held in the Crowne Plaza Restaurant

THURSDAY, March 19th — Focus on Conservation Excellence and Education

Concurrent Sessions

8:00-8:30 Breakfast / Registration

8:30-9:30 Appraiser Roundtable

A discussion driven by the questions and concerns of interested participants regarding everything from appraisal reviews by the State of Colorado, engagement letters, timing of appraisals, appraiser competency, and appraisal techniques.

- Moderated by Kevin Shea of Conservation Tax Credit Transfer and Anne Wilkinson-Renaud of Hunsperger & Weston
- Held in the Park - Office Room

8:30-9:30 Conservation Defense Insurance

Although land trusts have had relatively few legal challenges, conservation easements and lands are increasingly under attack across America. Every easement is vulnerable to violations and frivolous law suits. Many land conservation leaders are concerned about the increase both in the cost of and the number of legal challenges to conservation easements and have asked the Land Trust Alliance to investigate the feasibility of insurance to cover these litigation costs. This workshop will review current challenges and costs, discuss the Alliance investigations into alternative collective defense methods and review the draft business terms.

- Larry Kueter, Isaacson Rosenbaum P.C.
- Dan Pike, Executive Director of Colorado Open Lands
- Held in the Library - Museum Room

9:30-9:45 Break

9:45-11:00 Easement Process Roundtable

A facilitated discussion where peers can engage in conversation and learn from others about the easement process. The specific topics will reflect the expressed interest of participants, but could include land owner information packets, easement language, and baseline documentation procedures.

9:45-11:00 Easement Stewardship Roundtable

A facilitated discussion where peers can engage in conversation and learn from others about easement stewardship. As with the other roundtables, the specific topics will reflect the expressed interest leading up to the conference, but could include issues such as enforcement challenges, exercise of reserved rights, and amendments.

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- K-Lynn Cameron, Larimer County Parks and Open Space and Dave Nichols, Executive Director of Montezuma Land Conservancy
- Held in the Park – Office Room

- Janis Whisman, Boulder County Parks and Open Space and Chris West, Executive Director of Colorado Cattlemen’s Agricultural Land Trust
- Held in the Library – Museum Room

11:00-11:10 Break

11:10-12:00 CCLT Annual Meeting: We invite all of CCLT’s members and supporters to join us! CCLT’s staff and Board of Directors will present our new Strategic Plan and discuss topics such as reopening and expanding our membership process to include other conservation professionals. We will invite representatives to participate in new CCLT Committees and invite questions and comments from our members and supporters.

12:00-12:50 Lunch

- Held in the Park-Office Room

12:00-12:50 Colorado Open Space Alliance (COSA) Directors & Managers Meeting

- Held in the Library-Museum Room

12:50 – 1:00 Break

1:00-4:00 Mineral Development and Land Conservation Handbook: This introduction to, and discussion of, CCLT’s most recent publication will be valuable for all conservation professionals who evaluate new projects and inform landowners of the potential impacts of mineral development on land they are considering or have already put under conservation easement.

- Melinda Beck, Faegre & Benson
- Kathleen Staks, GOCO
- Bethany Collins, AVLT
- Held in the Park-Office Room

1:00-3:00 Navigating the State of Colorado Easement Holder Certification Application: Review the questions, format, and process of the application, plus understand what the Division of Real Estate is looking for, and have an opportunity to ask question in an open forum with Program Manager.

- Hollis Glenn, Colorado Division of Real Estate
- Held in the Library-Museum Room

3:00-5:00 Demystifying the Accreditation Process: Presenters will explain the accreditation process and its benefits and offer general strategies to help land trusts better prepare for accreditation. You will hear from land trusts that have been in the trenches of the accreditation program. The presentation will also examine common challenges faced by accreditation applicants and provide strategies and specific tips.

- Suzanne Fusaro Stephens, Aspen Valley Land Trust
- Mary Banken, Estes Valley Land Trust
- Drew Bennet, Mesa Land Trust
- Larry Kueter, Isaacson Rosenbaum P.C. and the Land Trust Accreditation Commission
- Held in the Library-Museum Room

4:00-5:00 Water Conservation Support for the Land Conservation Community: This presentation will give an overview of how land conservation organizations should approach water rights from the very beginning of the conservation process all the way to recommendations for stewardship.

- Amy Beatie, Executive Director of the Colorado Water Trust
- Held in the Park-Office Room

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FRIDAY, March 20th — *Focus on Conservation Excellence and Education*

Concurrent Sessions

8:00-8:30	Breakfast / Registration	
8:30-11:30	LTA Standards & Practices Curriculum-- Monitoring Conservation Easements and Using and Supplementing Baseline Documentation Reports Over Time: Help ensure the land you saved yesterday remains protected tomorrow and beyond. This training will cover everything from pre- monitoring preparation to post-monitoring work, including how to prepare a safe and effective visit, how to conduct a thorough monitoring visit, and how to address possible violations. <ul style="list-style-type: none">• Shelton Douthit, Standards & Practices Trainer (of Shelton Douthit Consulting), assisted with local examples by Chris West and Carolyn Aspelin of Colorado Cattlemen's Agricultural Land Trust• Held in the Park-Office Room	8:30- * LTA Standards & Practices 11:30 Curriculum—Land Trust Boards: Preparing for Perpetuity: This training will examine board structure and governance along with methods for achieving the critical elements of a successful board. Topics such as optimal board size, board development, fundraising strategies, roles and responsibilities, and effective use of committees will be covered. <ul style="list-style-type: none">• Illene Roggensack, Standards & Practices Trainer (President of Third Sector Innovations)• Held in the Library-Museum Room
11:30-12:30	Lunch	
12:30-2:00	<i>continued</i> LTA S&P Course – How to Use and Supplement Baseline Documentation Reports Over Time	12:30- 2:00 <i>continued</i> LTA S&P course on Land Trust Boards: Preparing for Perpetuity

*We are also considering doing a session for this block of time on Nonprofit Law and Recordkeeping For Land Trusts. Please contact Greg Yankee (greg.yankee@cclt.org; 303.271.1577) if you would like to share your preference.