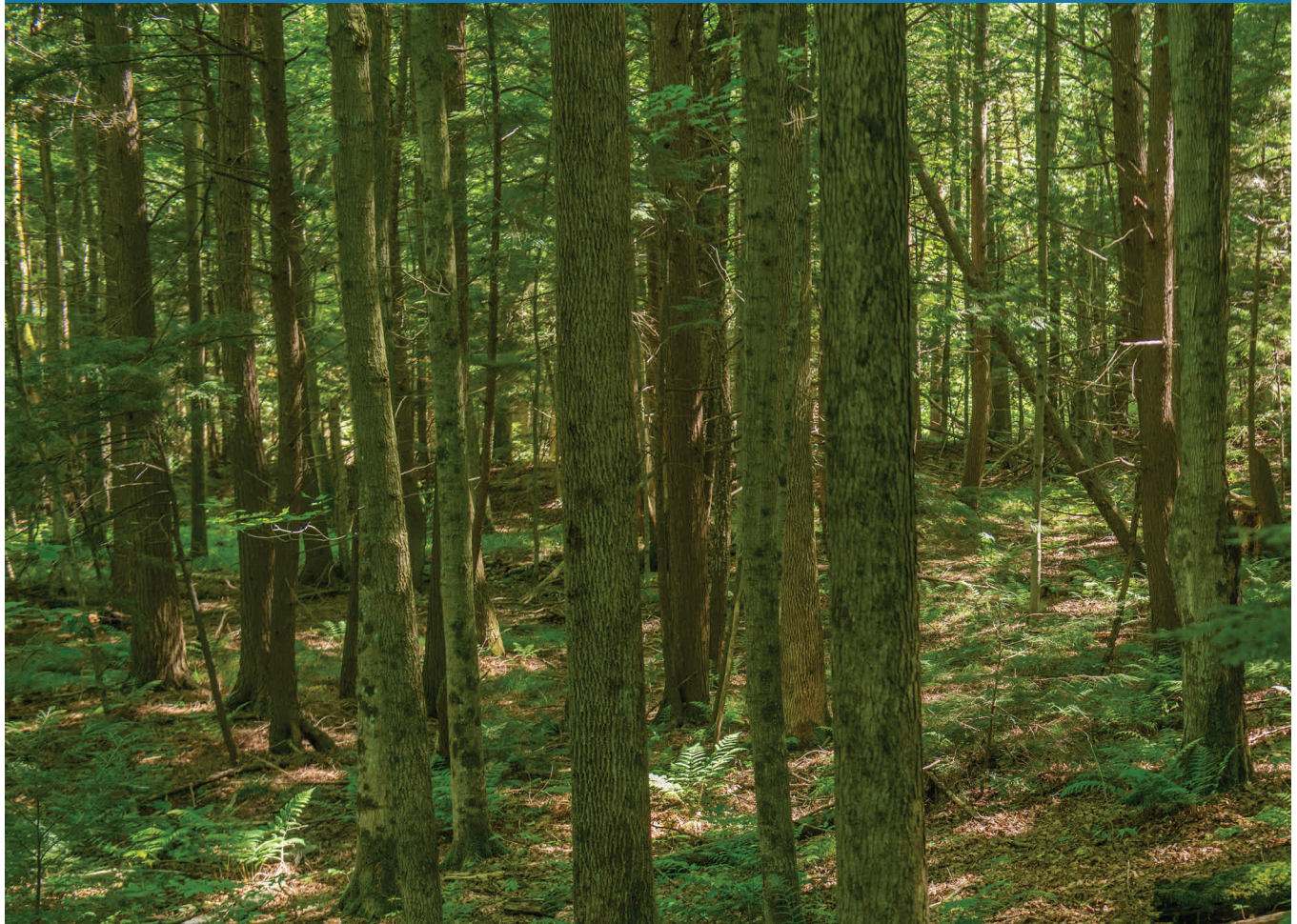




ONTARIO LAND TRUST ALLIANCE



YMCA Geneva Park Conference Centre, Orillia, Ontario
October 21-23, 2015



2015 OLTA Gathering

WELCOME TO THE 2015 ONTARIO LAND TRUST GATHERING!

We are pleased to return to the YMCA Geneva Park Conference Centre on the shores of beautiful Lake Couchiching for the 2015 OLTA Gathering. Our theme this year is **Conservation Connections**. We hope you will forge new connections with your community and reconnect with friends!

Please join us at OLTA's Annual General Meeting at 5:00 pm on Thursday, October 22 in the auditorium of the Centennial Centre.



About OLTA

The Ontario Land Trust Alliance (OLTA) is a registered charity that strengthens and advances land conservation. OLTA supports the land trusts by building their capacity through training and educational programs; supporting on-the-ground conservation work through funding and partnership programs; and acting as a voice for the land trust community. OLTA members collectively own and steward over 80,000 acres across the province and this number grows every year.

2015 Gathering Committee

Brian Banks
Robert Barnett
Kate Dykman
Tanna Elliott
Laura Kucey
Phyllis Lee
Vicki Schmolka
Deborah Thompson
Susan Ungurean-Cumming

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Cover Image: Bruce Kennedy

PRE-CONFERENCE SESSIONS

Wednesday, October 21—2:00pm to 5:00pm

LEARNING INSTITUTES

Two 3-hour highly practical sessions that will surely build your skills, confidence and abilities!

Ecological Gifts Program: The Ontario Perspective

Laura Kucey, Environment Canada - Ecological Gifts Program and David Babineau, Chair, Ecological Gifts Program Appraisal Review Panel

Canada's Ecological Gifts Program provides a way for landowners with ecologically sensitive land to protect nature and leave a legacy for future generations. Made possible by the terms of the *Income Tax Act*, it offers significant tax benefits to landowners who donate land or a partial interest in land to a qualified recipient.

This workshop will provide an Ontario Regional perspective of the Ecological Gift process and what is required of donors and recipients. Common questions, Appraisal Review and Determination, complex situations and helpful hints will all be discussed. Every Ecological Gift is unique!

Learning Outcomes:

- Understanding the Ecological Gift process
- Understanding donor and recipient requirements
- Helpful hints for preparing a successful submission

Building Member Engagement in Land Trusts

Lindsay Telfer, Canadian Freshwater Alliance

Engagement organizing remixes tried, tested and true, face-to-face community organizing methods, with online technology and best practices of organizational culture and leadership. Engagement is built by recruiting and mobilizing relationships between and among supporters, reaching a point where our supporters themselves are leading. Come learn about engagement organizing principles and explore how you might apply them within your land trust, small not for-profit, conservation authority or municipality.

This session is organized by Paul Bubelis, Sustainability Network with support from the Gosling Foundation.

Learning Outcomes:

- A methodology to refine organizational communications to better connect and inspire existing and potential supporters
- A strategy and approach for managing and building relationships with a broader audience
- A model for deepening volunteer relationships within your organization and towards achieving your specific outcomes.

OPENING PLENARY

Thursday, October 22, 9:00 am - 9:15 am

Remarks by the Lieutenant Governor of Ontario, the Honourable Elizabeth Dowdeswell, OC, OOnt.

Opening Plenary, 9:15 am - 10:30 am

Larry McDermott, Executive Director of Plenty Canada

Our keynote speaker is Larry McDermott, Executive Director of Plenty Canada, an indigenous not-for-profit organization devoted to environmental protection, sustainable development and healthy communities. Larry will review the opportunities for achieving land trust goals through the inclusion of Indigenous traditional knowledge and Canadian reconciliation through shared activities on the land we love.



Larry will provide an overview of the Convention on Biodiversity, The Call to Action (Truth and Reconciliation Commission) recommendations, the United Nations Declaration on the Rights of Indigenous Peoples (UNDRIP) and the Canadian Commission for UNESCO work on achieving similar goals with Biosphere Reserves and his experience with land use planning in Ontario. This is the backdrop for looking at opportunities to achieve biological diversity, and bringing Indigenous and western science based values together to protect our lands for future generations.

Biography

Larry McDermott is a member of Shabot Obaadjiwan First Nation and has been appointed Ambassador by Chief and Council. Larry has served as an Ontario municipal politician for 28 years including mayor of Lanark Highlands and warden of Lanark County. He has served as the First National Chair and Co-founder of the Rural Forum, Federation of Canadian Municipalities (FCM) and the FCM board appointee to the Canadian Sustainable Communities Awards Judges Panel for five years. He has served on the Ontario Public Advisory Committee on Species at Risk and as the Aboriginal member of the Ontario American Eel Recovery Strategy. He was also a member of the Ontario Natural Resources Aboriginal Traditional Knowledge Working Group.

Larry is an Ontario certified tree marker, licensed trapper and community volunteer. He serves on the Canadian Commission for UNESCO's Sectorial Commission for Natural, Social and Human Sciences and he is one of two Aboriginal members of the Ontario Human Rights Commission. He is a member of the International Indigenous Forum on Biodiversity (IIFB). Larry and his family are proud owners of 560 acres of private lands which includes a provincially significant wetland.

OLTA Member Accomplishments

The keynote speaker will be followed by the OLTA Accomplishments presentation which showcases the achievements of OLTA members and associates over the last year. Celebrate the great land conservation and stewardship work being done in Ontario. Congratulations!

SPECIAL EVENTS

OPEN FORUM WITH THE OLTA BOARD OF GOVERNORS

Wednesday, October 21, 6:30–7:30 pm

This popular session gives Gathering attendees a chance to meet Board members and have an informal discussion about OLTA. Bring your thoughts and questions. Judging from past years, this will be an interesting and dynamic event.

OLTA ANNUAL GENERAL MEETING

Thursday, October 22, 5:00–6:30 pm, in the auditorium of the Centennial Centre.

BANQUET & SILENT AUCTION

Thursday, October 22, 6:30-8:30 pm

Start bidding on the wonderful auction items. Cash bar opens at 6:30 pm.

YOUNG CONSERVATION PROFESSIONALS PANEL

How to Involve the Next Generation in the Land Trust Movement

Thursday, October 22 at 8:00 pm during the Banquet.

We will hear from young conservationists that have joined the land trust movement. Our panelists will share their thoughts on how land trusts can better involve the next generation in their work - as board members, employees, volunteers and supporters!

**THE FUN CONTINUES AFTER THE
BANQUET—OPEN JAM SESSION!**
bring your musical instrument and sing!



VISIT OUR EXHIBITORS

The Bruce Trail Conservancy
Canadian Wildlife Federation
Escarpment Biosphere Conservancy
Forests Ontario
Freshwater Future Canada
Long Point Basin Land Trust

Muskoka Conservancy
Oak Ridges Moraine Land Trust
Ontario Farmland Trust
Ontario Land Trust Alliance
The Conservation Fund

CONFERENCE SESSIONS

2A Conservation Easements: Emerging Issues

Thursday, October 22, 10:45 am - 12:00 pm

Jeremy Collins, Ontario Heritage Trust; Howard Hamilton, Nature Conservancy of Canada; Jane Prohaska, American Friends of Canadian Land Trusts; Kristie Virgoe, Oak Ridges Moraine Land Trust; Laura Kucey, Environment Canada (Moderator)

Back by popular demand - join our panel of experts as they explore on-the-ground realities of conservation easements. This year: Emerging Issues. The panelists invite you to submit questions and issues for discussion in advance. Everyone will come away understanding more about this valuable conservation tool.

Learning Outcomes:

- Learn how other land trusts are handling conservation easements
- Improve your capacity to develop strong easement language
- Increase your knowledge of the use of conservation easements in Ontario

2B Deal Doctor: Creative Case Studies - Land Securement on a Tight Budget

Thursday, October 22, 10:45 am - 12:00 pm

Robert Orland, Orland Conservation

Learn from case studies. Be inspired by creative solutions to different land securement problems. There are so many great properties to conserve. Increase your capacity to make it happen.

Learning Outcomes:

- Learn how to secure unique properties and negotiate land acquisitions with your eyes open
- Benefit from brainstorming with others

2C Ten Good Ideas About Grant Writing

Thursday, October 22, 10:45 am - 12:00 pm

Terri LeRoux, Credit Valley Conservation Foundation and Andrew Kett, Credit Valley Conservation

Grants are a great source of funds but the process of researching funding sources, writing compelling proposals and managing funder relationships can be a frustrating quest for many non-profits. Often, organizations become discouraged by complex procedures, intense competition for funds and the lengthy waiting period on granting decisions. However, writing effective grant proposals is a skill that non-profit staff members and volunteers can build proficiency in. This session will explore 10 good ideas about grant writing that will build your confidence and enable your proposal or application to be more competitive.



Learning Outcomes:

- The value of constructing a compelling, concise case for support
- How to appeal to the different granting sources including foundations, government agencies and corporate philanthropy programs
- The importance of setting realistic benchmarks and true cost budgets

3A The Impact of Conservation Agreements on Property Tax Burdens

Thursday, October 22, 1:30 pm - 2:45 pm

Peter Tomlinson, University of Toronto

Owners of environmentally valuable land can enter into conservation agreements that bind future owners. Because society benefits from these agreements, there is a public policy case for tax incentives encouraging their use. An automatic property tax incentive is expected when assessments are based on market value, as in Ontario, since purchasers seeking development will avoid properties subject to conservation agreements. The issue of why assessment relief may not materialize in practice will be explored, along with property tax incentive options by-passing the assessment system.

Learning Outcomes:

- Understanding how conservation agreements can affect property value
- Understanding relevant provisions in the Ontario Assessment Act
- Understanding property tax policy options encouraging greater use of conservation agreements

3B Put Your Species At Risk to Work... For You

Thursday, October 22, 1:30 pm - 2:45 pm

Alison Howson, Ontario Land Trust Alliance and Paul Nichol, Ecosystems

This workshop will provide guidance on how to use Species at Risk to support your work. Case studies will demonstrate how improving your knowledge of Species at Risk can help with grant proposals, profile raising and increasing support, whilst also benefiting the species themselves. In the second half of the session we will have a demonstration of a new SAR database. It is being developed by OLTA in collaboration with Ecosystems Inc. to assist our members in recording species information for your properties. An open session will follow to seek member input into the design of the database to best meet your needs.

This session is being provided with the generous support of the Ministry of Natural Resources and Forestry.

Learning Outcomes:

- Informed about OLTA's Conserving Species at Risk program
- Ideas and strategies to leverage Species at Risk funding
- Using a database to support SAR recording on your properties

3C Vacation Properties - Tax and Succession Planning

Thursday, October 22, 1:30 pm - 2:45 pm

Adam Aptowitzer, Drache Aptowitzer LLP

There are many family cottages that may be suitable additions, in whole or in part, to a land trust. This session will look at the tax issues land trusts should have in mind when meeting with property owners.

Learning Outcomes:

- An understanding of the new tax law proposals regarding the sale of real estate and the donation of proceeds and how it will affect the solicitation For donations of private property
- An understanding of some of the tax concerns applicable to family cottages on death
- An appreciation of the strategies to be employed on directing cottage properties to charity as part of generational turnover

4A Benefits and Challenges of Trails

Thursday, October 22, 3:15 pm - 4:30 pm

Robert Orland, Orland Conservation; Patrick Connor, Ontario Trails Council; Dan Shire, Thickson's Woods Land Trust and Daria Koscinski, Thames Talbot Land Trust

Trails bring members of the community to a property and promote the conservation organization. Trails can also bring some challenges - accidents, use beyond what is allowed and overuse damaging valuable natural features. The panelists will share their experiences with trails showing the benefits and how they have met some of the challenges. Everyone is invited to share their experiences during this session.

Learning Outcomes:

- Understand the benefits and challenges of trails to assist in assessing if a trail is appropriate for a property
- Increase your knowledge of the possible ways to meet the challenges of public use



4B Make American Landowners' Estate Planning a Boon for Your Land Trust

Thursday, October 22, 3:15 pm - 4:30 pm

Sandra Tassel, American Friends of Canadian Land Trusts; Antoin Diamond, The Bruce Trail Conservancy; Ron Rose, Grant Thornton

Ecologically sensitive land will be transferred to the next generation in the coming years. Taxes, family dynamics and financial pressures may result in properties being sold and lost to development in this process. Lands owned by U.S. taxpayers are

particularly at risk because Americans are unprepared for Canadian capital gains rules. Ontario land trusts are working with American Friends of Canadian Land Trusts to achieve conservation objectives, help owners to accomplish their goals and avoid the need to purchase properties on the open market.

Learning Outcomes:

- Learn how estate planning by American landowners can protect important conservation lands in Canada
- Understand how American Friends of Canadian Land Trust can help both Americans who own land in Ontario and Ontario land trusts

4C Making Citizen Science Work for Land Management

Thursday, October 22, 3:15 pm - 4:30 pm

Tanya Pulfer, Ontario Nature; Alison Kirkpatrick, Ontario Federation of Hunters and Anglers; Victoria MacPhail, Wildlife Preservation Canada; James Pagé, Canadian Wildlife Federation

Good land stewardship requires a good understanding of what is occurring on the land. Citizen science puts many “eyes on the ground” to find, identify, and report on species observations. Find out what tools exist to assist citizen scientists so that their findings can inform land trust and conservation organization property management plans.

Learning Outcomes:

- Find out how to engage citizen scientists through available programs and technologies
- Identify ways to retrieve and use the information collected
- Appreciate the benefits of focusing and utilizing volunteers to collect information

5A Linking People to a Landform: The Lake Iroquois Plain

Friday, October 23, 8:30 am - 9:45 am

Mark Stabb, Nature Conservancy of Canada; Heather Brooks and Jamie Davidson, Central Lake Ontario Conservation Authority

Take a virtual tour of glacial Lake Iroquois and the influence its still-visible sandy beaches and bluffs have on society today - from Burlington Heights, to the benches of Niagara, to the Scarborough Bluffs, to the slopes of Northumberland and beyond. This overview of the natural and cultural history of the Lake Iroquois Plain will include conservation successes and opportunities (e.g. as related to the Greenbelt review) and profile OLTA member properties.

Learning Outcomes:

- Learn more about the natural and cultural history of one Ontario’s most densely populated landscapes
- Gain ideas on interpreting landforms/landscapes
- Appreciate the role of land securement and planning to protect natural heritage features

5B Managed Forests Conservation Easement Agreements

Friday, October 23, 8:30 am - 9:45 am

Jeremy Collins, Ontario Heritage Trust and Robert Spence, Ministry of Natural Resources and Forestry

Ontario's Managed Forest Tax Incentive Program (MFTIP) encourages sustainable forest management. Currently, 16,400 properties (1.8 million acres) are enrolled in MFTIP. Most landowners list "managing for biodiversity and conservation" as their primary goal. However, after a lifetime of caring for a forest under MFTIP, after ownership changes a property can potentially be clear-cut. A solution, developed by the Ontario Heritage Trust, is a Managed Forest Conservation Easement Agreement (MFCEA) which extends managed forest protection in perpetuity.

Managed Forest Conservation Easement Agreement: <http://www.heritagetrust.on.ca/Conservation/Conservation-easements/Managed-Forest-Conservation-Easement-Agreements.aspx>

The Agreement for Cora's Woods: <http://www.heritagetrust.on.ca/Conservation/Conservation-easements/Visit-our-easement-properties/Central-Ontario/Cora-Munn-Property-%28Brighton%29.aspx>.

Learning Outcomes:

- Learn about the MFTIP program from MNRF staff
- Learn how a Managed Forest Conservation Easement Agreement (MFCEA) works and how it compares to traditional "forever wild" easements
- Learn strategies to address MFCEA issues

5C The Greenway: A Biodiversity Blueprint for Land Securement and Stewardship

Friday, October 23, 8:30 am - 9:45 am

Leora Berman, CMO, The Land Between

The Land Between's Greenway mapping project scores lands for securement, restoration, and stewardship based on their contribution to biodiversity. The resulting template is useful to land trusts and stewardship groups for their own conservation priority mapping work and as added rationale to bolster existing local natural heritage mapping and prioritization strategies.

Learning Outcomes:


- Appreciate the value of setting landscape scale priorities
- Discover how biodiversity can be used to guide ecotone mapping
- Build your capacity for community participation and strategic landowner outreach

6A Funding Stewardship: How Much and How To Get It

Friday, October 24, 9:55 - 11:10 am

Reggie Hall, The Conservation Fund

As your organization conserves more land and easements your stewardship burden grows, a few questions may arise: How do you create a dedicated stewardship fund? How do you calculate how you need for a particular project? How do you know when



you've got enough funds set aside? How do you fund any legal action needed to enforce the terms of a restriction? As your program grows and evolves, how will you reflect your enhanced understanding of your program costs? This workshop will focus on the various responsibilities within a comprehensive easement stewardship program and identify numerous ways that organizations are answering these questions and tackling these issues.

6B Farmland Securement in Ontario: Experiences, Innovations and Future Directions Friday, October 24, 9:55 - 11:10 am

Matt Setzkorn, Ontario Farmland Trust; Barb Davies, The Regional Municipality of York, Pat Learmonth, Farms At Work; Ron Reid, The Couchiching Conservancy

The Ontario Farmland Trust and the Regional Municipality of York have developed a case studies publication to showcase ways land trusts are protecting and managing farmland in Ontario. Drawing from these case studies, this session will offer experience and discussion of farmland conservation easements; farm acquisition; farms as Eco-Gifts; and farmland stewardship.

Learning Outcomes:

- Learn from different farmland securement initiatives of Ontario land trusts, including the farmland conservation easement approach and fee simple farmland acquisition
- Discover new resources on conservation easements that are available to Ontario land trusts and their advisors, and for lawyers, accountants and real estate brokers involved in the land securement process
- Become familiar with programs and funding opportunities that support farmland stewardship

6C Reserve Funds - Budgeting for the Future

Friday, October 24, 9:55 - 11:10 am

Ninette Bishay, Grant Thornton LLP

Reserve funds offer charities and not-for-profit organizations important benefits. What is the role and what are the types of reserves appropriate for your organization? How should you calculate reserve levels? How should you show and explain reserves in the financial statements so that donors /grantors understand the role of reserve assets? What are best practices for setting up a reserve, managing it, and withdrawing funds? This session will explore the answers to these questions to help you adopt a unique reserves plan to meet your specific needs and circumstances.

Learning Outcomes:

- Understanding the role of reserves and how to calculate reserves
- How to show and explain reserves in financial statements
- The best practices for setting up, managing, and withdrawing from reserves.

7A Educational Programming: Possibilities on Your Lands

Friday, October 24, 11:15 am - 12:30 pm

Tanna Elliott, The Kensington Conservancy and Gerrit Kamminga, rare Charitable Research Reserve

Providing educational programming on your properties can be a great way to share its ecological value and inspire the researchers and land stewards of tomorrow. The focus of this session will be to explore development and delivery of different programs.



7B Investing and Managing Your Land Trust Funds

Friday, October 24, 11:15 am - 12:30 pm

James Dunn, CIBC Wood Gundy and Bill Lougheed, Georgian Bay Land Trust

This session will look at general market investment and how one land trust manages its investment funds. The return expectations for low and medium risk profiles will be discussed given today's investment realities. In practice, how do you invest and manage your land trust funds? This session will address the market realities along with strategies and actions for you to consider.

Learning Outcomes:

- Enhanced understanding of investment risk profiles: low, medium and high
- Enhanced assessment of your own risk appetite
- Ideas to address your land trusts need for investment

7C Monthly Giving - The Key to Financial Stability

Friday, October 24, 11:15 am - 12:30 pm

Tanya Clark, The Couchiching Conservancy

Interested in having a steady source of income to support the work you are doing? We'll walk you through Monthly Giving; how it can help; ways to get set up; and how to integrate it into your existing fundraising efforts. We'll present real examples to guide you through a successful campaign and give you tips for creating and executing your own Monthly Giving program.

Learning Outcomes:

- Understand how Monthly Giving is the key to your not-for-profit's financial stability
- Get practical tools and tips to communicate your message to supporters
- Feel empowered to create your own Monthly Giving campaign

SPEAKER BIOGRAPHIES

Adam Aptowitzer, Managing Lawyer, Drache Aptowitzer LLP

Adam Aptowitzer practices in the areas of charity and tax law. He is a member of both the bars of Alberta and Ontario and has been writing and speaking on the topic of charity law for several years. He has written two major studies for the C.D. Howe Institute and has just published a new book "Starting and Maintaining a Charity in Canada". Adam has given expert opinion testimony on Parliament Hill and proposed the original idea which became bill C-458. He has also appeared before the Tax Court of Canada, the Federal Court of Appeal and the Supreme Court of Canada.

David Babineau, Chair, Ecological Gifts Program Appraisal Review Panel

David Babineau has been a member of the Ecological Gifts Program Appraisal Review Panel since 2006 and has recently taken on the role of Chair of the Panel. He has been an appraiser in a private firm since 1980 and has had the opportunity to participate in a number of interesting and challenging assignments related to ecologically sensitive property throughout the Maritime Provinces. David also has a broad range of experience in the preparation of appraisals for acquisition, disposal, expropriation, and other litigation purposes. In addition, he has provided consultations to various clients for valuation-related problems, including a number of First Nation Land Claims. David is a member of the Appraisal Institute of Canada and received the designation of AACI in 1989. He has served on various committees of the Appraisal Institute over the years and is a currently a member of the Appeal Committee and a certified presenter of the Professional Practice Seminar.

Leora Berman, CMO, The Land Between

Leora Berman is the corporate founder and CMO of The Land Between (TLB) - a national charity that was incubated by two land trusts and born of the dedication of Peter Alley. Leora assigned a vision for the effort of bioregionalism; the animate sharing and participation in holistic solutions that honour the landscape, culture, and socio-economy of the region. The Land Between is the most extensive effort of this nature in Ontario, second to Carolinian Canada. Having worked with governments and large NGO's for the past 20 years, and with vast experience in nature resource management, project development, and landowner contact, Leora has utilized these experiences to outline and launch large cornerstone projects under TLB and which benefit community based organizations supporting their increased capacity.

Ninette Bishay, Grant Thornton LLP

Ninette Bishay has over 12 years of assurance and business advisory experience, with most of her career spent working exclusively with charities and not-for-profit organizations. Her areas of expertise include audit and financial reporting; internal control evaluations, and CRA compliance. Ninette is dedicated to providing distinctive client service, going beyond process, seeking new and effective ways to increase efficiencies and overall success. Ninette is an active member of Grant Thornton's Charities and Not-for-Profit Organizations Sector Group and a frequent speaker at firm seminars. She is greatly involved in the community serving in various leadership positions, giving her a unique perspective into the challenges faced by charities and not-for-profit organizations. She brings this understanding and passion for service to her clients.



Tanya Clark, Development Coordinator, The Couchiching Conservancy

Tanya Clark is the Development Coordinator at the Couchiching Conservancy and brings fresh and young eyes to one of the oldest land trusts in Ontario. She has helped to grow the Conservancy's general donations and increased the number of monthly givers by over 50%. She graduated at the top of the class with a Bachelor of Business Administration from Lakehead University and is one credit away from completing a graduate certificate in Fundraising and Resource Development. Tanya is also a keen birder, loves photography and canoeing, and is a big music lover.

Jeremy Collins, Acquisitions Coordinator, Ontario Heritage Trust (OHT)

Jeremy Collins is a specialist in the acquisition of fee simple and conservation easement interests in cultural and natural heritage properties. As Acquisitions Coordinator for the OHT, he brings almost twenty-five years of practical experience to conserve cultural and natural heritage resources through a variety of securement strategies. Jeremy has coordinated the acquisition of over 50 Trust natural heritage easements to protect a range of properties from coastal habitats to fragile wetlands to mature woodlots to part agricultural/part natural parcels. He is the first to say that each property is individual and unique in its heritage and ownership context and the "right" easement strategy for that property. Just when he thinks he's seen it all, an easement acquisition comes along with a fresh combination of issues (features/ownership/land use/third party interests) to prove the old adage: "the world is not flat ('cookie-cutter' easements) but round (more elusive horizons that require many talents and tools for dealing with natural and human dynamics)".

Patrick Connor, Executive Director, Ontario Trails Council

Patrick Connor has led hundreds of national and provincial trail planning and development projects in his over 25-year career.

Achievements include securing \$8M in funding for Trans Canada Trail (TCT) lands through the National Trails Coalition project of 2009 -10 that resulted in thousands of kilometers of TCT trail refurbished and maintained for continued public Conservation Fund in their Arlington, VA office. He co-chairs Virginia's United Land Trusts' Executive Committee and has received numerous awards for his work to protect In 2012, Patrick was awarded the QEII Silver Jubilee Medal for Service to Canada. Dedicated to working locally, provincially and nationally to assist in widening community development and strengthening the communities that agencies serve, Patrick believes in an accepting and tolerant Canada, supported by healthy vibrant communities.

Barb Davies, Regional Greening Coordinator for York Region

Barb Davies is the Regional Greening Coordinator for York Region and is responsible for the implementation of York Region's Greening Strategy. Barb's career includes work at Ontario's Point Pelee National Park and the Essex Region Conservation Authority in Southwestern Ontario in areas of public education and restoration biology. In 2001 she moved to the GTA to be the Manager of Natural and Cultural Heritage for Rouge Park and in 2011 began working for York Region. A passion for the natural environment has driven Barb's career but her more recent vocation has expanded her focus to include linking the benefits of the natural environment to sustainable communities.

Antoin Diamond, Director of Land Securement, The Bruce Trail Conservancy

Antoin Diamond is a professional land use planner with The Bruce Trail Conservancy where she currently serves as the Director of Land Securement. Originally from the UK, she appreciates the importance of conserving natural heritage and of the powerful role land trusts play in this task. Antoin has specialized in land securement on the Niagara Escarpment since 2006. The position has given her insight into the tremendous benefits of working in partnership with local community groups, the private business sector, with fellow land trusts as well as government organizations (federal, provincial and municipal) to secure land. The BTC has secured thousands of acres and millions of dollars in donated land and funds. Integral to this success, Antoin has gained substantial experience in landowner relations, real estate transactions and land use planning policies and legislation needed to implement the numerous securement options available to landowners. Antoin holds an honours degree in Geography and GIS and Environmental Analysis from the University of Guelph and is member of the Canadian Institute of Planners and a registered member of Ontario Professional Planners Institute.

James Dunn, Vice-President, CIBC Wood Gundy

James Dunn is a Vice-President - Investment Advisor with CIBC Wood Gundy. He is a CPA (Chartered Professional Accountant of Canada) a Fellow of the Canadian Securities Institute and holds a CIM designation (Chartered Investment Manager).



Tanna Elliott, Executive Director, The Kensington Conservancy

Tanna Elliott is the Executive Director of the Kensington Conservancy. In this role Tanna has lead the growth of this very new land trust. Tanna, as a long-time resident of Northern Ontario has a great passion for her home, its open spaces and fresh water. Concerned about water quality and over development on the shores of Lake Huron, and the many pristine inland lakes; she has become a strong voice in educating landowners and municipalities on good stewardship practices. Tanna has spent more than 25 years working in an executive capacity as well as volunteering for non-profit organizations and charities. Tanna currently sits on the OLTA Board of Governors and is the past Chair.

Reggie Hall, Director, Land Conservation Loan Program, The Conservation Fund

Reggie Hall grew up and was educated in New England attending Williams College and Vermont Law School where he received his JD and MSEL degrees. He started his land conservation career at the Conservancy of Southwest Florida before moving on to the Carolina Mountain Land Conservancy in NC. Currently, he is the Director of the Land Conservation Loan Program with The

Howard Hamilton, Legal Counsel, Ontario, Nature Conservancy of Canada (NCC)

Howard Hamilton joined NCC's Ontario Region in 2000 after a few years volunteering with the Couchiching Conservancy during which he acquired a taste for doing conservation land transactions. With NCC, Howard's role has evolved from primarily securement activities to supporting Program Directors and stewardship staff with advice and documentation.

Alison Howson, Species at Risk Specialist, Ontario Land Trust Alliance Inc.

Alison Howson is OLTA's Species at Risk Specialist. Her work includes delivering technical training and support to local land trusts in monitoring and managing sites for Species at Risk. Prior to joining OLTA, Alison was Principal Ecologist for two consulting firms in Cambridge, UK. In these roles she provided technical guidance on Species at Risk survey, monitoring, management and protection. She has many years of experience working in the field of ecological survey and evaluation and has published papers and presented on various topics including: economic valuation of wildlife, survey and monitoring techniques for mammals, and developing novel techniques for monitoring the effectiveness of new design features on road crossings.

Gerrit Kamminga, Senior Educator, *rare* Charitable Research Reserve

With 6 years' experience in the educational field, Gerrit is the Senior Educator at the *rare* Charitable Research Reserve and responsible for program development and delivery. The *rare Every Child Outdoors* (ECO) program draws over 2500 students per year from Waterloo and surrounding regions. He obtained his B. Ed. from Nipissing University with a focus on Junior/Intermediate Science following completion of the B.Sc. Marine and Freshwater Biology Honours Program from the University of Guelph. Gerrit is an outdoor educator who is passionate about connecting our young learners with nature and getting every child outdoors.

Alison Kirkpatrick, Specialist, Ontario Federation of Anglers and Hunters

Alison Kirkpatrick is the Monitoring and Information Management Specialist with the Ontario Federation of Anglers and Hunters. She has a Honours Bachelor of Science Degree in Biology from Trent University and is a graduate of Sir Sandford Fleming College's Ecosystem Management. For the past 3 years, Alison has been working with the Invading Species Awareness Program promoting awareness of

aquatic and terrestrial invasive species impacting Ontario's biodiversity. Today she will be presenting on the EdMaps invasive species citizen science program.

Daria Koscinski, Conservation Property Manager, Thames Talbot Land Trust

As the Conservation Property Manager, Daria's role includes evaluation of potential properties, preparation and execution of stewardship plans for Land Trust properties, and coordination of outreach and education programs at TTLT properties. Daria has been actively involved in conservation and land stewardship in Ontario since 2000 through her education, work and volunteer experience with environmental groups. Daria received her BSc and MSc from Queen's University and her PhD from Western University and has a strong background in ecology, population genetics and habitat fragmentation. Daria is also an Assistant Professor at Western University and teaches part-time in the Department of Biology. Daria enjoys spending time in nature, restoring habitats, and sharing her enthusiasm for local biodiversity through educational programs.

Laura Kucey, Habitat Biologist, Canadian Wildlife Service - Environment Canada

Laura Kucey is the Ontario Regional Coordinator for the Ecological Gifts Program. With Environment Canada since 2010, Laura previously coordinated consultations under the *Species at Risk Act* on federal recovery documents. Prior to that, she spent four years with the Ontario Ministry of Natural Resources and Forestry in the Biodiversity and Lands and Waters Sections. Laura holds a B.A. in Biology and Geography from Colgate University and a M.Sc. in Zoology from the University of British Columbia. Her graduate work comprised of studying the effects of disturbance on Steller sea lions on remote islands in the North Pacific. In between degrees, Laura spent two years in Washington, D.C. working for *National Geographic* magazine.

Pat Learmonth, Director, Farms at Work

Pat Learmonth served as the Environmental Farm Plan Representative and Workshop Leader for Peterborough County for seven years, and co-founded the Kawartha Farm Stewardship Collaborative. She serves on the Peterborough County Stewardship Council, the Greater Peterborough Area Agricultural Advisory Committee and the Sustainable Peterborough Working Group on Food and Farming. Pat holds a B.A. in Environmental Studies (Trent University) and a degree in Law (University of Western Ontario). Through her work, teaching, research, consulting and personal experience, she has developed extensive networks with farms and farming organizations within the Kawartha region, as well as across Ontario. Pat and her husband own a farm near Peterborough.

Bill Loughheed, Executive Director, Georgian Bay Land Trust

Bill Loughheed has a cumulative 20 years in CEO, VP and Executive Director capacities in not-for-profit and for-profit organizations. He has been responsible for operating budgets of \$1M, sourced through fundraising, raising venture capital, planned giving and scientific grants. Bill has a lifetime of interest in conservation and land stewardship in Georgian Bay. He is VP of Madawaska Club (Georgian Bay) which owns and stewards 1300 acres of wilderness property on Georgian Bay. Bill is the Executive Director of the Georgian Bay Land Trust since July 2013.



Photo: Bruce Kennedy

Victoria MacPhail, Program Biologist, Wildlife Preservation Canada

Victoria MacPhail is the National Pollinators at Risk Program Biologist with Wildlife Preservation Canada, working to protect and recover at-risk pollinator species. She has a Master of Science degree in Environmental Biology from the University of Guelph, and has extensive experience with many aspects of pollination, from plant breeding systems to insect identification and pollinator-friendly gardening. She was the co-ordinator of the NSERC-Canadian Pollination Initiative network during its formative period and is also Co-Chair and Director of Publicity and Outreach for Pollination Guelph, a completely volunteer-run charitable organization based in Guelph, Ontario that works to protect pollinators and their habitats. She will be speaking about the citizen-science website, BumbleBeeWatch.org, and its implications for raising awareness, gathering data, and promoting conservation.

Robert Orland, President, Orland Conservation

Robert Orland founded Orland Conservation in 2003 as a social enterprise offering services in land conservation, sustainability and communications to municipalities, conservation authorities, and land trusts. With over 25 years of experience, Robert began his career with the Lake Simcoe Region Conservation Authority and worked in a variety of positions before specializing in land securement with the Nature Conservancy of Canada. In 2008, Robert formed Backyard Bounty, an urban farming organization in Guelph that promotes community-based sustainable gardening and organic food production in partnership with local residents and business owners. Robert has delivered presentations and workshops across Southern Ontario and abroad, and has facilitated and advised on the protection and stewardship of nearly 10,000 acres of natural heritage lands and parks.

James Pagé, Program Officer, Canadian

Wildlife Federation James Pagé is the species at risk and biodiversity program officer for Canadian Wildlife Federation. James has a post bachelor's degree in environmental science and biology at Simon Fraser University. James has previously worked for Ministry of Natural Resources, Parks Canada, and the Eastern Ontario Model Forest. James has been committed to citizen science as demonstrated by his initiative to have a Canadian-led Naturalist program.

Jane Prohaska, Director, American Friends of Canadian Land Trusts

Jane Prohaska is an attorney and independent consultant to conservation organizations around the US. She also currently serves as the Director of Public Affairs for the Minnesota Zoo and is a director at American Friends of Canadian Land Trusts. Previously Jane was President and Executive Director of the Minnesota Land Trust—one of the ten largest as well as one of the first accredited land trusts in the US. In the past Jane worked for The Nature Conservancy in Minnesota—initially as Regional Counsel and later as Vice President and Midwest Regional Director. Jane authored the Land Trust Alliance's publication Nonprofit Law and Recordkeeping for Land Trusts. She graduated magna cum laude from the University of Minnesota Law School and cum laude from Carleton College.

Tanya Pulfer, Conservation Science Manager, Ontario Nature

Tanya Pulfer has focused most of her career in engaging the public in the conservation of species. She has a joint B.Sc. in environment science and biology, M.Sc. in ecology and B.Ed. focusing on outdoor education. Tanya joined Ontario Nature in 2013, as the Citizen Science Coordinator in charge of the Ontario Reptile and Amphibian Atlas. She is now the acting Conservation Science Manager overseeing the Nature Reserves and Citizen Science programs.

Ron Reid, Carden Program Coordinator, The Couchiching Conservancy

Ron Reid is currently Carden Program Coordinator for the Couchiching Conservancy, after "semi-retiring" from seven years as Executive Director. He has over 40 years of experience as a consultant and staffer in the conservation field, primarily in the non-profit sector. Ron was deeply involved with the creation of the Ontario Nature Trust Alliance (OLTA's predecessor), and has been a member of numerous non-profit boards. His current interests focus is on alvar and grassland birds, and on creating a voluntary certification program for aggregate producers.

Ron Rose, Tax Consultant, Grant Thornton LLP

A Chartered Accountant from New Brunswick, Ron is a Tax Consultant (retired Tax Partner) with the firm of Grant Thornton LLP, a major international firm. He is Co-Treasurer of American Friends of Canadian Land Trusts (AF). Ron has been in public accounting practice for more than 40 years, all but 3 years as an income tax specialist, and has provided wide-ranging tax planning and compliance services to corporate clients in numerous industries and to individuals. Ron has extensive experience implementing estate plans and estate freezes for high net worth individuals and advising the beneficiaries of large estates. Ron has spoken frequently on the subject of estate planning and wealth preservation and has also authored a number of papers and articles on these and other income tax topics. In addition to his role with AF, Ron is Treasurer of the N.B. Children's Foundation and was previously President of Family Services Saint John and a director of the Saint John YMCA and the Saint John Rotary Club. Ron and his wife, Beth, spend as much time as possible with their children and grandchildren in New Brunswick and Toronto and at their cottage in Cambridge-Narrows, NB.

Matt Setzkorn, Executive Director, Ontario Farmland Trust

Matt Setzkorn is the Executive Director of the Ontario Farmland Trust (OFT). Matt has a degree in Agro-ecology from the University of Guelph. Matt served as OFT's Land Securement and Policy Coordinator for several years before stepping into the executive director position a year and a half ago. Through his various roles at OFT, Matt has supported the development of new land securement partnerships, tools and approaches that have advanced the permanent protection of Ontario farms and broken new ground for farmland conservation in Canada.

Dan Shire, Vice President, Thickson's Woods Land Trust

Dan Shire is the Vice President of the Thickson's Woods Land Trust. Dan and his wife Karen became involved with the Thousand Islands Watershed Land Trust in 2000 when they set up a conservation easement on 100 acres of a farm that had been in his mother's family since the 1840s. Dan served on the provincial AODA standards committee which established regulations to make Ontario fully accessible to all citizens by 2025. He works for IBM Canada as a business consultant, participated in the OLTA Naturally Accessible project and is looking forward to becoming a Toronto Zoo volunteer in (eventual) retirement.

Rob Spence, Administrator, Managed Forest Tax Incentive Program, Ministry of Natural Resources and Forestry

Rob Spence graduated from the University of Toronto in 1982 earning a Bachelor of Science Forestry degree. Rob is a Registered Professional Forester with over 33 years of experience in resource management planning and has worked in both the private and the public sectors. Rob has worked with the Ministry of Natural Resources and Forestry for more than 20 years and is currently the Administrator of the Managed Forest Tax Incentive Program and the 50 Million Tree Program.

Mark Stabb, Central Ontario Program Director, Nature Conservancy of Canada

Mark Stabb has worked in the conservation field since his graduation from the University of Waterloo in 1982. His work includes ten years as a Biologist and Park Planner for the Ontario Ministry of Natural Resources, and as an environmental consultant and freelance writer and educator. Mark is the former president of Land Preservation Society of the Ottawa Valley and founding member of North Durham Nature.

Sandra Tassel, Program Coordinator, American Friends of Canadian Land Trusts

Sandra Tassel is a conservation consultant who helps land trusts in the US and Canada to achieve their strategic resource preservation objectives. In her role as member of AF's board and now as its Program Coordinator she has developed a unique expertise in cross-border conservation transactions. AF has partnered with 8 land trusts in 5 provinces to complete 14 transactions valued at more than \$7 million.



**Lindsay Telfer, National Project Director,
Canadian Freshwater Alliance**

Lindsay Telfer has over a decade of experience working with organizations, institutions and governments in developing policies and processes related to sustainability and public engagement. Her experience includes designing and participating in multi-stakeholder consultations and negotiations, strategic planning development, and communications and marketing geared towards public engagement in sustainability solutions. Lindsay has built a knowledgeable repertoire of leading edge strategies for effective communications, messaging, and engagement practices. She has worked on a diversity of projects, including: multi-stakeholder public consultation for the Province of Alberta; leading community engagement initiatives for Western Universities' sustainability strategy development; and most recently developing the Freshwater Alliance's successful grassroots capacity building program, trainings, and public engagement coaching practice.

Peter Tomlinson, University of Toronto

Peter Tomlinson is a Sessional Lecturer in Economics at the University of Toronto. Previously he was the City of Toronto's Director of Economic Development. As a consultant focusing on public finance he has served a wide range of public and private sector clients. He has recently co-authored several reports on property tax policy, published by the C.D. Howe Institute. He holds a PhD degree in Economics from the Johns Hopkins University.

**Kristie Virgoe, Program Manager, Oak Ridges
Moraine Land Trust**

Kristie Virgoe started her career with the Kawartha Conservation where she led the Stewardship and Land Protection divisions for over 8 years as the Manager of Environmental Protection and Restoration. Since that time she has worked for the Ontario Land Trust Alliance (OLTA) as Program Manager and the Muskoka Conservancy as their Executive Director from 2012 to 2015. As a busy mom, Kristie volunteers with her local school and puts her feet into action, volunteering and participating in the annual Weekend to End Women's Cancers walks, as well as running over 200km in two years to raise money for land protection in Ontario.



Photo: Bruce Kennedy

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WEDNESDAY, OCTOBER 21, 2015

1:30 pm - 2:00 pm	Registration - Geneva Court Lounge	
2:00 pm - 5:00 pm Learning Institutes	Ecological Gifts Program: The Ontario Perspective <i>Laura Kucey & David Babineau</i>	Building Member Engagement in Land Trusts <i>Lindsay Telfer</i> Geneva Court Mezzanine
5:00 pm - 6:00 pm	Registration - Geneva Court Lounge	
5:30 pm - 6:30 pm	For overnight guests - Dinner And Informal Networking - Geneva Court Dining Hall	
6:30 pm - 7:30 pm	Open Forum with the OLTA Board of Governors	

THURSDAY, OCTOBER 22, 2015

7:30 am - 8:30 am	Registration - Geneva Court Lounge		
7:45 am - 8:45 am	For overnight guests, Breakfast - Geneva Court Dining Hall		
8:30 am - 9:00 am	Registration - Centennial Centre Lounge		
9:00 am - 9:15 am	Remarks by <i>The Lieutenant Governor of Ontario, The Honourable Elizabeth Dowdeswell, OC, OOnt</i> Centennial Centre Auditorium		
9:15 am - 10:15 am	Opening Plenary - A Shared Responsibility, A Shared Response <i>Larry McDermott</i> Centennial Centre Auditorium		
10:15 am - 10:45 am	Break & Registration - Geneva Court Lounge		
10:45 am - 12:00 pm	2A Conservation Easements: Emerging Issues <i>J. Collins, H. Hamilton, J. Prohaska, K. Virgoe, L. Kucey (moderator)</i> Geneva Court Room #16	2B Deal Doctor: Creative Case Studies - Land Securement on a Tight Budget <i>Robert Orland</i> Geneva Court Room #4	2C Ten Good Ideas About Grant Writing <i>Terri LeRoux & Andrew Kett</i> Geneva Court Mezzanine
12:00 pm - 1:00 pm	Lunch And Informal Networking - Geneva Court Dining Hall		
12:15 pm - 12:30 pm	Presentation by Forests Ontario 50 Million Tree Program: Tree Planting Subsidy Programs for Landowners <i>Shelley McKay</i>		
1:30 pm - 2:45 pm	3A The Impact of Conservation Agreements on Property Tax Burdens <i>Peter Tomlinson</i> Geneva Court Mezzanine	3B Put Your Species At Risk to Work... For You <i>Alison Howson & Paul Nichol</i> Geneva Court Room #16	3C Vacation Properties - Tax and Succession Planning <i>Adam Aptowitzer</i> Geneva Court Room #4
2:45 pm - 3:15 pm	Break - Geneva Court Lounge		

THURSDAY, OCTOBER 22, 2015

3:15 pm - 4:30 pm	4A Benefits and Challenges of Trails <i>Robert Orland, Patrick Connor, Dan Shire & Daria Koscinski</i> Geneva Court Room #16	4B Make American Landowners' Estate Planning a Boon for Your Land Trust <i>Sandra Tassel, Antoin Diamond & Ron Rose</i> Geneva Court Room #4	4C Making Citizen Science Work for Land Management <i>Tanya Pulfer, Alison Kirkpatrick, Victoria MacPhail & James Pagé</i> Geneva Court Mezzanine
5:00 pm - 6:30 pm	Ontario Land Trust Alliance - Annual General Meeting Centennial Centre Auditorium		
6:30 pm - 8:30 pm	Cash Bar, Banquet & Auction Geneva Court Dining Hall		
8:30 pm - whenever	Open 'Jam Session' around the campfire		

FRIDAY, OCTOBER 23, 2015

7:30 am - 8:30 am	For overnight guests, Breakfast - Geneva Court Dining Hall		
8:00 am - 8:30 am	Registration - Geneva Court Lounge		
8:30 am - 9:45 am	5A Linking People to a Landform: The Lake Iroquois Plain <i>Mark Stabb, Heather Brooks & Jamie Davidson</i> Geneva Court Room #16	5B Managed Forests Conservation Easement Agreements <i>Jeremy Collins & Robert Spence</i> Geneva Court Mezzanine	5C The Greenway: A Biodiversity Blueprint for Land Securement and Stewardship <i>Leora Berman</i> Geneva Court Room #4
9:45 am - 9:55 am	Break - Geneva Court Lounge		
9:55 am - 11:10 am	6A Funding Stewardship: How Much and How to Get It <i>Reggie Hall</i> Geneva Court Room #16	6B Farmland Securement in Ontario: Experiences, Innovations and Future Directions <i>Matt Setzkorn, Barb Davies, Pat Learmonth & Ron Reid</i> Geneva Court Mezzanine	6C Reserve Funds - Budgeting for the Future <i>Ninette Bishay</i> Geneva Court Room #4
11:10 am - 11:15 am	Break - Geneva Court Lounge		
11:15 am - 12:30 pm	7A Educational Programming: Possibilities on Your Lands <i>Tanna Elliott & Gerrit Kamminga</i> Geneva Court Room #16	7B Investing and Managing Your Land Trust Funds <i>James Dunn & Bill Loughheed</i> Geneva Court Mezzanine	7C Monthly Giving - The Key to Financial Stability <i>Tanya Clark</i> Geneva Court Room #4
12:30 pm - 1:30 pm	Lunch And Informal Networking - Geneva Court Dining Hall		



2015 Ontario Land Trust Gathering

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