

A History of the Land Trust Movement in Ontario (1947-2016)

In Celebration of OLTA's 20th Anniversary (2002 – 2022)



Photos: B. Heidenreich

Contributors:

Barb Heidenreich, *OLTA Governor, Project Lead*

Ian Attridge, *Lawyer; Faculty Trent University; OLTA Governor, Project Coordinator*

Sara Kelly, *Faculty, Sir Sandford Fleming College; OLTA Governor*

Martina Albert, *Ecosystem Management Technology Graduate, MC2 Environmental Consulting*

Chelsea Houston, *Ecosystem Management Technology Student, MC2 Environmental Consulting*

Mara Van Meer, *Ecosystem Management Technology Graduate, MC2 Environmental Consulting*

Cheyenne Wilt, *Ecosystem Management Technology Graduate, MC2 Environmental Consulting*

Brianna Pitt, *B.Sc. OLTA Volunteer*



2019 - 2022



Protected: Pictured Lake _ Thunder Bay Field Naturalists



Photo: B. Heidenreich

Protected: Cheltenham Badlands_ Ontario Heritage Trust

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EXECUTIVE SUMMARY

The purpose of this project was to document the history of the land trust movement in Ontario based on a review of literature relating to land trust practices, as well as personal interviews. The land trust movement has had a long history in the province, gaining momentum throughout the 1970's and early 80's. Much of this history has not been thoroughly documented, including the methods in which the land trust model used in America was adapted to fit the Canadian system. As the grassroots individuals involved in the development of this movement begin to age, this information is at risk of being lost forever. This project strives to record the perspectives, experiences, and knowledge of stakeholders who act(ed) as researchers, managers, and pioneers of the movement. Through the methods presented in this report, the authors documented varying experiences, recommendations, and pivotal moments of the movement to ensure that no details will be lost. Documenting the past of land trusts in Ontario will allow land stewardship and securement practices to improve in the future by using previous methods as a learning platform. The methodology used to obtain this information included the compilation and summary review of documents relevant to different eras of the movement. Interviews were then conducted with the stakeholders who had influence upon the development of the community of lands trusts formed over this period in Ontario. The interviews were recorded and transcribed to aid in the creation of a historic timeline for the land trust movement in Ontario... not fully complete as some key members are missing, but what time, resources and availability allowed (for this volume at least!).

Key findings in this project include that while much has been accomplished, there is still room for improvement in policy and legislation that allows for transfer of property from landowner to a land trust organization. OLTA is advancing the movement by acting as a coordinating body, and that further mentoring of best practices for land trusts in the province would provide a more consistent framework for future organizations. It is also notable that each individual interviewed highly valued their experience within land conservation and stewardship, and believe these are areas of protecting the natural and cultural heritage of Ontario are extremely important for young people to be a part of.



Photo: B. Heidenreich




Photos: B. Heidenreich

"John Swagen has condensed everything that Canadian public interest advocates need to know about law but were too busy to find out."
 — Kai Milyard, director, Greenpeace Foundation.

"It's a wonderful book of tremendous importance to anybody who ever wanted to take on a court or a case." — Clayton Baly, lawyer.

"This is a remarkably thorough review of legal pitfalls and opportunities for public interest advocates, from an obviously experienced and committed public interest lawyer." — Brian Hor, Law Union of Ontario.



How to Fight for What's Right

THE CITIZEN'S GUIDE TO PUBLIC INTEREST LAW

How to Fight for What's Right is a guide both for lawyers and for lay people that will steer them through the legal thickets they face when they take on government and business in the courts. This book will meet the needs of environmentalists, civil rights organizations, consumer groups, lawyers and legal staff of community law clinics — it is the guide that shows citizen groups how to use the legal system to their advantage. Some of the issues dealt with:

- How to get your fight before the courts.
- How to avoid opposition tactics aimed at keeping your case out of the courts.
- What to say and what not to say when your case is before the courts.
- The special problems faced by public advocacy lawyers when a case is before the courts.
- How to stay out of trouble and out of court if the opposition decides to play dirty.
- What to do in demonstrations and how to deal with harassment and intimidation.
- How to avoid being silenced by opposition threats of libel and slander.

John Swagen is a lawyer with the Ontario Ministry of the Environment. He was a public advocacy lawyer for over seven years and has frequently been involved in citizen-inspired court actions against big business and government.

CITIZENS AND THE ENVIRONMENT SERIES
 Canadian Environmental Law Research Foundation
 James Lorimer & Company, Publishers



Photo: Garth Baker

1.0 Introduction

The purpose of this report is to document the early history of the land trust movement in Ontario. The methodology used to record this history included the compilation and summary review of 44 relevant documents from different eras of the movement. After gaining context to the creation and development of land trusts in Ontario, interviews were then conducted with some of the stakeholders who had influence upon the community of lands trusts formed over this period in time. This involved reaching out in 2019 to the stakeholders to schedule the interviews, and resulted in completed interviews with Ian Attridge, Frank Shaw, Bryan Howard, and Ron Reid. Further interviews were undertaken in 2022 and all these interviews were recorded and transcribed, then reviewed and released by the stakeholders. Their words provide insight into a full historic timeline for the land trust movement in Ontario. As well, these interviews provide a view on the different eras of the movement and how different organizations were progressing along with the significant changes to legislation and policy tools. This project strives to record the perspectives, experiences, and knowledge of stakeholders who acted as researchers, managers, workers and pioneers within Ontario's land trust movement.

2.0 Chronological Literature Review 1947-2016

2.1 Land Securement History in Ontario from 1947-1988

Literature Review by: Mara Van Meer

Introduction: NOTE: An alphabetical listing by author is contained in Appendix A.

The Land Trust movement in Ontario was initiated to protect and sustain natural features in perpetuity. It is debated when natural protection efforts began in Ontario, though conservationists worked to slow the use of provincial resources as early as the 1900s (Hummel, 2016). The conservation movement in Ontario can be divided into subgroups, the first wave from the late 1880s-1900s as foresters struggled to manage depleting resources. The 1960s-1970s brought to public awareness, human impact on the environment which resulted in the creation of Greenpeace and several other environmental agencies (Hummel, 2016), while the 1980s-90s brought the wave of legislation adjustment. **From 1947-1988, the focus of the land trust movement was the analysis of legislation in place to protect natural heritage features, historic examination and strategies for land protection, obstacles preventing the use of easements and the establishment of a regional land trust association, along with several recommendations to adjust municipal land planning and legislation for the protection of natural features in Ontario.** The conservation movement was able to grow and succeed due to the advancement of land use planning, with the first *Planning Act* enacted in 1946 and with it came a growing recognition of the need to conserve natural features and how land uses may be controlled, and who may control them. "How to fight for what's right" (John Swaigen, 1981) through books and articles enabled citizens and provided insight into changing legislation, taxation and the founding principles of conservation groups. Through analyzing past case studies, the conservation movement was able to move forward by implementing effective resource protection plans and

developing a working relationship with private landowners as well as the public and government.

Richardson, A. (1970). Conservation by the People: The History of the Conservation Movement in Ontario to 1970. Toronto: University of Toronto.

This book details the beginning of the conservation movement, starting in the 1930s with groups including the Ontario Conservation and Reforestation Association and the Federation of Ontario Naturalists. In 1941 the Guelph Conference brought conservationists together and ultimately resulted in the establishment of the Conservation Branch in 1944 by the government of Ontario, the *Conservation Authorities Act* passed in 1946. This resource describes a general timeline of the initiation of land conservation in Ontario. The first chapter identifies key individuals involved in the idea of conservation. Also outlined is the initiation of government support for conservation and amendments made to the *Conservation Authorities Act* to address issues at the time such as flooding, forest conservation, soil erosion, trout habitat, recreation and accessible conservation techniques. Additionally, the end of the report focuses on the need for conservation, outreach to youth, and next steps for the following 25 years. This report concludes with a chapter detailing steps forward in conservation from 1952-1969. In 1952, administration costs were amended to the *Conservation Authorities Act* of 1946, covering the cost of expenses required for conservation work. Leading up to this, there was little money available to carry out conservation efforts other than flood control and authority forests. In summary, conservation authorities started asking for considerations upward of \$20,000 to become policy in order to complete conservation efforts of any size. In 1954 a recreation amendment was made, allowing a conservation authority to acquire lands and, if approved, build facilities to promote recreational activities. In 1956 the section of the *Conservation Authorities Act* excluding portions of Ontario within districts of the territories was repealed, allowing the establishment of a conservation authority anywhere in Ontario. In 1960 three members were appointed to each conservation authority by the provincial government as an amendment to the *Conservation Authorities Act*. In 1965, the *Conservation Authorities Act* was reviewed by a committee appointed, and Hamilton was given increased representation as part of the Hamilton Region Conservation Authority. In 1966 chairman J.S Bauer combined The Grand River Conservation Commission (1938) and The Grand Valley Conservation Authority (1948). In 1968, numerous changes were made to the *Conservation Authorities Act* of 1946, most relevant being legislation outlining the governing of conservation authorities being rewritten, creating the *Conservation Authorities Act* of 1968.

Swaigen, J. (1979). Preserving Natural Areas in Ontario: Private Ownership and Public Rights. Toronto: Canadian Environmental Law Research Foundation.

This informative report discusses the legal hurdles, benefits, and identifies resources and enticements for the preservation of privately-owned land in Ontario. Individuals and organizations engaged in private land conservation can use this document to better understand legal processes that both enable and obstruct the larger-scale protection of natural areas in the province. Six subsections of this research report address existing legal tools in place to encourage the protection of privately-owned land. Incentives for owning land, restrictions on the destruction of natural areas, prohibitions against polluting and disrupting ecological processes, licensing, as well as alternative protection options are included. Incentives for conservation described include financial assistance such as loans,

reduced taxation, and opportunities under the *Woodlands Improvement Act*, *Forestry Act*, the *Conservation Authorities Act*, the *Trees Act*, the *Game and Fish Act*, and the *Municipal Act*. Restrictions on the destruction of natural areas is prevented via the *Planning Act*, which is the most restrictive legislation in terms of land use. Prohibitions to a private owner disrupting natural processes are discussed using *The Topsoil Preservation Act*, *The Endangered Species Act*, *The Conservation Authorities Act*, and *The Trees Act*, while pollution is prevented under the *Environmental Protection Act*, the *Ontario Water Resources Act*, the *Pesticides Act*, the *Public Health Act*, and the *Fisheries Act*. Licensing is required if a private landowner wants to adjust a natural areas, is covered under *The Pits and Quarries Control Act*, the *Waste Management Provisions of the Environmental Protection Act*, the *Municipal Act*, while water is addressed under the *Ontario Water Resources Act*, the *Beds of Navigable Waters Act*, the *Navigable Waters Protection Act*, the *Beach Protection Act*, and the *Lakes and Rivers Improvement Act*. Alternative tools to protect natural features rather than land ownership include leasing, registration as a forest reserve and the *Ontario Heritage Act*. The overall result outlined in this report is the need for law reform, which discusses the conservation easement, incentives, identifying significant land, enforcement tools and penalties, land maintenance, greater local powers, as well as the right to a high-quality environment. In conclusion, this resource mentions specific legislation that encourages private ownership and discusses limitations of legislation. Overall, it encourages new laws that reflect the updated views of society.

Ainsworth, L., & Kreutzwiser, R. (1986). Municipal Land Use Planning and Natural Heritage Protection in Ontario. Guelph: Department of Geography, University of Guelph.

This study was completed to analyse the development of municipal land use planning as an instrument for the protection of natural heritage features. The objectives were to discuss the use of municipal land use planning to protect features in Ontario, analyze the process in several municipalities including Halton, Hamilton-Wentworth, as well as Haldimand-Norfolk, and suggest future recommendations for improving the process for municipal land protection. These objectives were met by analyzing planning of natural areas at a municipal level, an overview of several case studies, the creation of criteria for assessment, and finally a structure to rate the criteria. It was found that the process for land use planning is successful in the protection of natural heritage features throughout Ontario as a municipal strategy. Natural areas planning is effective due to the presence of an institutional framework that provides for designation of natural areas within official plans, and the protection of these natural areas without purchasing the land. The planning of natural areas doesn't prevent development but does identify substantial natural features via environmental impact statements and would require mitigation efforts should development occur. Land use planning increases environmental consciousness for parties involved, encompassing landowners and the general public. Examination of the case studies identified several important features of land use planning such as public involvement, rapport with landowners, and administration of policies. Several recommendations were suggested, for instance upper tier municipalities allowing public involvement throughout the planning stages and the creation of an advisory committee, education for the public about the natural environment from municipalities, as well as support from environmental groups/ the community to protect natural features. Further recommendations include the establishment of policies for natural areas, collaboration of agencies for thorough

monitoring, examination of enforcement policies for natural areas, and the use of environmental advisors to ensure mitigation efforts. Finally, the conclusion of this document suggests municipalities monitor mitigation measures implemented by creating a system to manage natural areas and that municipalities should evaluate measures to protect natural features after a 5-year time span.

Hilts, S., Kirk, M., Reid, R. et al. (1986). Islands of Green Natural Heritage Protection in Ontario. Toronto: Ontario Heritage Foundation.

This document was compiled for the Ontario Heritage League as a tool to protect natural heritage areas in Ontario. Generally, it outlines several topics surrounding the protection of natural areas, such as how to gather information about natural heritage, strategies for protection of land, agencies providing protection, and aid in gathering support from the public. Additionally, legislation information detailing municipal land use planning/ land use planning on crown land, stewardship planning, and case histories are also provided. This resource touches lightly on legislation to provide context for land use planning, stewardship planning, and specific case studies. Land acquisition is organized into seven categories. This includes acquirement and management by a non-government organization with private funding (such as Stone Road Alvar managed by the Federation of Ontario Naturalists), or acquisition by government/private sector as a result of encouragement from public/ individuals (Prince Edward Point, Canadian Wildlife Service). Other methods include acquisition by government and managed by a private agency funded by donation/grant; private ownership in which owner preserves site; donations of money to purchase heritage lands or the bequest of heritage lands; heritage sites not yet protected but contact awareness programs are required; and lastly, acquirement of natural areas that have been altered for other land uses. The chapter on case studies identifies several general statements that can be made regarding strategies, finance, public and private sectors, and individual stewardship in land securement. These statements provide foresight into future efforts for land conservation. Statements encourage individuals to initiate the conservation effort, monitor areas that face environmental degradation, and reiterate that citizen support is needed but only if finances are available. Furthermore, the document states that dedication is required for the cause, land taxation will need to change to encourage conservation for landowners, land must be preserved for diversity and for a healthy planet in the future. Lastly donations from private landowners will aid in conservation of a site for generations.

Reid, R. (1987). Conservation Easements Implementation Project. Washago: Bobolink Enterprises.

This implementation project was performed to analyse historic use of conservation easements and investigate the reasoning that is preventing their use of easements in Ontario. As well, this study was also used to identify future recommendations for optimal use. They are advantageous to property acquisition due to lower price, and less management. As well, the land is still in private ownership, and the general public is not involved. Statutory easements under the *Ontario Heritage Act* and the *Ministry of Government Services Act* prove helpful in solving the issue of common law easements. Historic easements maintained by the Ontario Heritage Foundation (OHF), use of conservation easements in the United States, and a niche group of individuals that tend to

donate were identified as key components for the use of easements. Complications involving the use of conservation easements by Ontario agencies were deliberated, including the mandate used to hold conservation easements and the use of the OHF mandate. The price of land acquisition and success of easements, uncertainty in terms of the creation of easements and appropriate price of land, and the public agencies and their role in protecting lands are all reviewed. As far as landowners agreeing to partake in conservation easements, obstacles include stubbornness around natural features on one's land that require protection, fear of legal documentation and the government being involved, length of document and time to completion, as well as minimal monetary incentives. However, it was found that conservation easements are effective in protecting natural areas in the province, and obstacles preventing their use must be discussed. Hesitation from landowners indicates that the use of conservation easements will gain popularity at a slow rate, and as a small part of natural protection. Easements are considered one of many possibilities to conserve private property. In summary, next steps suggested include gaining familiarity with easement use and encouragement towards landowners for donations to agencies. As well, necessities for maintenance of natural features should be clearly stated to landowners and improved incentives need to be created for a large range of landowners. The training of staff members and collaboration between agencies will increase the use of easements. A negotiating approach should be used to incorporate the needs of land owners, and monetary/staff resources should be focused on buying conservation easements by agencies that rely on conservation easements as primary conservation efforts.

Ward, E. N., & Killham, B. (1987). *Heritage Conservation: The Natural Environment*. Heritage Resources Centre, University of Waterloo, 1–178.

In this report Ward and Killham provide a national overview of planning for the natural heritage environment as it is structured throughout Canada. The authors utilized secondary research in order to compile and provide this single document intended to inform practitioners, decision-makers and the interested public about land planning techniques. The report begins with an overview of international conventions and programs that help protect Canada's natural heritage followed by a description of lands protected by the federal government through the Canadian wildlife service, the parks service, and through the national capital commission. Next, the largest part of the report, is an overview of natural heritage legislation, policies and programs for each province and territory. Lastly, six of the numerous non-government organizations that aim to protect natural heritage are discussed to provide an indication of the kinds of activities carried out by such groups across Canada. The report established, that as of 1987, the protected natural heritage areas of the federal and provincial/territorial governments constitute 68 617 987 ha or 6.9% of Canada's land and freshwater area.

Conclusion: This report is important to this project because it is a good baseline to see how far we have come in terms of protecting natural heritage. It is also important because provincial land trusts can develop measures based off of international conventions and programs laid out in this report that help to protect Canada's natural heritage. They can also build off of legislations, policies and programs that have worked for other

provinces/territories. Being able to see what has been successful/unsuccessful in the past may help new and existing land trusts be successful in the future as well as help them avoid making previous mistakes.

Reid, R. (1988). Bringing Trust to Ontario a Study on the Role of Nature Trusts, Phase 1. Wasago: Bobolink Enterprises.

This study is phase one of three sponsored by the Federation of Ontario Naturalists to address the discussion paper produced by the Ministry of Culture and Communications regarding heritage policy. The Natural Heritage League recommended investigating the use of a provincial land trust association based off of the National Trust in Britain to complete heritage objectives. To identify the effectiveness of a provincial land trust, this phase of the study aims to create discussion about the concept of nature trusts. This is met by analyzing the challenges of conservation in the 1990's, touching on trends impacting the natural areas of the province, several issues are identified that need to be resolved: low options for alternatives to land acquisition, the protection of rural areas and the general cooperation of private landowners and prospects for progress. This document utilizes existing trusts to analyze activities and organization models, land types protected, land trusts across the nation, and the patterns present in successful trusts. This study also touched on provincial trusts and why they are needed, the role of a provincial land trust, and how to implement a provincial land trust. The general function and structure of regional nature trusts are also discussed for context. Three general conclusions resulted from this study. The first being that the 1990's will generate increased burden on natural areas in the province, as will environmental consciousness of the public. However, a general lack of initiatives for private landowners will not address the obstacles of land protection during this time. Specifically, it is noted that there are little prospects in place to protect sites that are not provincially substantial, to use alternative methods than land acquisition, to link protection efforts with municipal planning, and to collaborate efforts between environmental agencies. New initiatives are required to prevent the degradation of the natural environment during this time. The second conclusion is that land trusts across the nation have protected privately owned natural areas successfully. This occurs due to a clear purpose communicated with the public, the participation of both landowners and the community, as well as flexibility to address a variety of situations. The last conclusion was that a nature trust should be established at the regional level to address future challenges.

Shrubsole, D. (1996). "Ontario Conservation Authorities: Principles, Practices and Challenges 50 Years Later". *Applied Geography*. 16: 319-335.

This resource analyzes the roots and founding ideals of conservation authorities in Ontario, which were 50 years old at the time of publication. 38 conservation authorities formed between 1946 and 1996, termed as a progressive approach to conservation. However, there have also been criticisms regarding the ability of conservation authorities which may be in conflict with provincial planning, experience severe membership turnover, and face drastic changes of community and public interest/priorities. The conservation authority program was created with six key principles; watershed authority, public participation, relationship between the province and municipalities, collaboration, a healthy economy created from a healthy environment, and an inclusive approach. The Upper Thames River Conservation Authority (UTRCA) was studied to examine if conservation authorities are meeting the six founding ideals that started the conservation movement when facing obstacles in the 1990s. As far as the management of watersheds, the focus has

shifted to catchments and sub watersheds based on the management obstacles present in the 1990's. The UTRCA has undertaken a major role for their watershed jurisdictions collaborating with London to complete 10 watershed evaluations. For public participation, UTRCA has included land owners in protecting natural features through the Clean Up Rural Beaches program, providing grants to land owners for upgrading systems and containing contaminants. Reduced funding from the provincial government impacted municipal-provincial relations, and the UTRCA was forced to adjust to increased municipal taxes and transfer reductions. As far as collaboration, the UTRCA has worked with farming agencies to address source pollution. The principle of a healthy environment for a healthy economy has been addressed by the UTRCA which has developed flood initiatives to support structural efficiency and economic prosperity. Lastly, an inclusive approach has been utilized by the UTRCA by creating a watershed strategy to meet the changing needs of the public. In summary, the founding principles are strong, although encompassed under different conservation goals and focuses. Main focuses for the UTRCA have been the establishment of new partnerships, and increasing funding initiatives.

Conclusion (1974 – 1988): After reviewing this literature it is evident that the focus of the land trust movement from 1974-1988 was the critical analysis of legislation in place that can be used to protect land, past strategies used to protect natural features, issues preventing easements and a provincial land trust agency, as well as several recommendations to improve land use planning for conservation. This is evident by the case studies analyzed, and amendments to legislation based on recommendations resulting from analysis. It is important to reflect on this period and the environmental stewards involved to continue moving forward in conservation. Throughout this time period, success was achieved by critically thinking about next steps and available tools for conservation perpetuity. Historic studies, an examination of conservation timelines, the principles and success of conservation authorities, and an effort to connect with the public/and owners ultimately initiated the success of the land trust movement during this time.

2.2 Land Securement History in Ontario from 1989-1997: Land Trust Formation and Conservation Easements

Literature review by: Martina Albert

Introduction: The history of non-governmental land trust formation in Canada spans nearly one hundred years, with a large gap in land trust formation between 1931 and 1971 and a renewed phase of land trust development through the efforts of non-profit, non-governmental organizations particularly throughout the 1980s and into the 1990's (Bunce & Chanda Aslam, 2016). Until the mid 1990s, the only way to conserve private land in perpetuity in Canada was essentially through a government agency or conservation organization taking ownership and promising to protect it. In 1995, the first conservation easement legislation in Canada was introduced in Ontario and created further efficiencies within the land trust movement (Good & Michalsky, 2010). More specifically the literature reviewed on this subject indicates that, **from 1989-1997, the focus of the land trust movement began to shift towards land trust formation and the implementation of enhanced/ renewed legislative measures and tools to protect natural heritage features, and to facilitate effective relationships and land protection objectives between landowners and land trust agencies in Ontario.** The use of conservation easement

agreements (CEAs) in Ontario became, and currently remains, the primary legislative tool for land trust organizations to preserve privately owned lands in perpetuity without the burden or responsibility of ownership. The basic purpose of conservation easement legislation is essentially the same across Canada – to conserve, protect, restore or enhance natural landscapes or features of the land. Interest in preserving land, across the country and the province, began to grow rapidly throughout the late 1980's and into the early 2000's, and land trusts began to establish at an enhanced pace throughout Ontario during this period of time (Good et al., 2010).

Wells, Y. C. (1989). Ontario's Natural Heritage: Options for Protection - A Manual for Land Conservation Organizations. Toronto: Ontario Heritage Foundation.

The purpose of this report is to present an amalgamation of research conducted by the Park and Recreational Area Section, Southwest Region (1989), with the objective of producing a user's manual for any agency interested in a land stewardship program. It was intended to provide guidance in the implementation of various land protection options, that were deemed most feasible and practical in the Province of Ontario at that present time.

Summary: Acquisition of land is no longer the sole instrument for preserving lands because they are being too quickly overrun and the price of land continues to rise. This encompasses the necessary emergence of alternative options for landowners and land protection agencies to better preserve land. Because of rising land prices and economic constraints, paired with the desire of private landowners to retain title to their property, a land protection agency must develop an array of efficient and cost-effective methods of land protection. These methods may include conservation easements, leases, management agreements and award/ incentive programs sponsored by the Ontario Heritage Foundation (OHF) [now the Ontario Heritage Trust]. Management agreements assist in providing the technical advice/ guidance a landowner may require to effectively manage their property in a specific way, for a predetermined period of time that aligns with the objectives of the landowner and the land protection agency. An array of services for this purpose were facilitated by the Ministry of Natural Resources (M.N.R), Ministry of the Environment (M.O.E), O.M.A.F, conservation authorities, and Ducks Unlimited. The Ontario Conservation Land Tax Reduction Program was a product of the *Conservation Land Act*, introduced to Ontario Legislature in December 1987, and allowed for “the establishment of programs to recognize, encourage, and support the stewardship of conservation land and the payment of grants to the owner of identified conservation lands”. Under the program established in 1989, owners of properties that meet the program criteria will be eligible for a 100% rebate of municipal land taxes paid. Leasing land was also a viable option, allowing for temporary occupation/ use of the property in exchange for payment, which could be spread over a prolonged period of time. Conservation easements, or statutory easements, agreements between a private landowner and a land protection agency, place restrictions on the use and development of a parcel of land. They are registered in perpetuity on the title of the property and therefore bind subsequent owners. The restrictions contained in the easement document are flexible and can therefore be customized to suit the landowner's objectives for their property, as well as the easement-holding agency, although, it can be difficult to accurately estimate the value of a conservation easement placed on a parcel of land.

Conclusion: Overall, during this time in the land trust movement in Ontario prior to the 1990's, there is an obvious need for more flexible and cost-effective methods of natural area and feature protection. The legislation regarding conservation easements and restricted covenants at the time is the *Ontario Heritage Act* and is still quite new, tax benefits for property owners are not particularly strong, and the types of land securement tools are evolving from simply just purchasing land.

Sauriol, C. (1991). Green Footsteps: Recollections of a Grassroots Conservationist. Toronto, Canada: Hemlock Press.

Green Footsteps by Charles Sauriol, who was known to many as “Mr. Conservation”, is a series of recollections from when he was involved in some of the most monumental land acquisitions for conservation area purposes within Ontario. The overall purpose of the book was to stimulate awareness of the need to protect the natural environment and preserve natural heritage lands. Another intention of the book was to generate hope, and, provide tools and knowledge to assist those also determined to protect and restore natural land. The tools and knowledge given by Charles through his recollections, provide a valuable source for people to refer to whether they are involved in non-governmental land trust organizations, conservation authorities, or are private landowners.

Summary: Chapter 1 – 6: Nostalgia – Land Acquisition

Charles was hired as Chairman of the Conservation Areas Advisory Board for the Metropolitan Toronto and Region Conservation Authority (MTRCA) in 1957, now known as the Toronto and Region Conservation Authority (TRCA), when all metropolitan conservation authorities were dissolved and merged into one. The Metropolitan Council supported a total of \$500,000 per year (a fortune in 1957) for the MTRCA to acquire land for conservation areas, but provincial and federal funds via grants were also utilized to acquire land. The Authority Foundation was later formed to raise funds from various corporations for the Authority's educational projects, with limited help from the municipalities. Municipalities were keen on utilizing natural spaces to monopolize on recreational activities, such as the Green Belt. Charles had assisted the Authorities in acquiring land purchases within the Green Belt and formed a partnership with Metropolitan Toronto Parks to form better land management practices. Over Charles' time with the MTRCA, he had a major hand in the implementation of 500 property purchases in Southern Ontario alone. His passion to protect the natural environment stemmed from his love of the Don River Valley, where he was born and raised, and his passion created a legacy far beyond.

Conclusion: Between the timeline of the early 1960's and late 1990's, the land trust movement in Ontario gained increased momentum, not only within the private realm via land trust organizations, but also within the public sector via conservation authorities. Conservation authorities were focused on acquiring large tracts of land including hazard lands and as such had access to municipal savings accounts (of up to 40% of the land purchase). During this time, provincial and federal funding became more accessible for the purposes of natural heritage land securement in Ontario within the public and private sector. But prior to 1995, land was being acquired and preserved via outright purchasing or leasing as opposed to having conservation easements placed on them.

Hilts, S., & Reid, R. (1993). Creative Conservation: A Handbook for Ontario Land Trusts. Don Mills, Ontario, Canada: Federation of Ontario Naturalists.

This handbook for Ontario Land Trusts focuses more upon the *how* of land conservation as opposed to the *why*, based on the assumption that those utilizing this resource already have an interest/ educated background on such matters and a willingness to act. The purpose of the handbook is to serve as an informative tool to be used by Land Trusts, regarding the techniques and organizational principles for effective action that can be applied in a broad range of settings, and also provides detailed information on the formation of a local land trust. With the exceptional interest that the book attracted, during and prior to publishing in 1993, Hilts & Reid anticipated the emergence of a wide range of Land Trusts in Ontario in the following years.

Summary: Part one: The Fundamentals – Chapter 1: Getting Started on Creative Conservation

Land Trusts can be based locally, regionally, provincially, or nationally. While there are a few non-profit organizations in Ontario with the actual title of Land Trust, there are many precedents for Land Trust activities in the province including: the Federation of Ontario Naturalists; historical societies; agricultural lands societies; Community Land Trust. Some of the organizations involved in the land trust movement working at the provincial and national level include the: Natural Heritage League; Ontario Heritage Foundation; Nature Conservancy of Canada; and Wildlife Habitat Canada. Land trusts are known to be involved in at least 14 distinct operational activities, though not all have the capacity to carry out each. Included in some of the most common activities are: purchase of threatened lands, often at less than full-market value; encouraging outright donations of lands to be held as Trust properties, be sold with restrictions attached, or be sold to raise funds for other activities ('trade lands'); managing lands according to the Trust's objectives and often involving volunteer participation; acquiring conservation easements to secure permanent protection of natural features without direct ownership; and raising funds through private donations and government funding programs. Land trusts are often successful for many reasons, some including: they work hard to gain confidence of landowners; they usually have a good charity for purpose; are able to show flexibility within their methods due to their non-bureaucratic nature; have a large range of support and establish a good reputation; and they respond quickly to local emergency situations.

Conclusion: At the time of publishing in 1993, there were around 10 land trust organizations in Canada and 4 in Ontario at varying stages of formation. Today, there are 140 land trust organizations with 35 being within Ontario (25%). This is a significant increase in the interest of land trust formation over the past 30 years, respectively. The increased interest of preserving natural lands and cultural heritage is what spurred the formation of land trust organizations and many publications of resources following, for the purposes of strengthening land trust organizations. The formation of land trusts across Ontario and the experiential learning that accompanied that is what this handbook is for ... a manual to refer to when building their organization.

Estrin, D., & Swaigen, J. (1993). Environment on Trial: A Guide to Ontario Environmental Law and Policy (3rd ed.). (W. Communications, Ed.) Toronto, Canada: Canadian Institute for Environmental Law and Policy. Retrieved January 2019

The mission of the Canadian Institute for Environmental Law and Policy (CIELAP) (formerly the Canadian Environmental Law Research Foundation – CLERF), was to provide leadership in the research and development of environmental law and policy that promotes the public interest and the principles of sustainability, including the protection of the health and well-being of present and future generations and the natural environment. In the forward to the First Edition (1974), it is stated that “[This book] is the long-term goal of an *Environmental Bill of Rights for Ontario* to ensure maximum civilian participation in the achievement of a quality environment.” An updated, expanded 2nd edition came out in 1978. Under the guidance of Barb Heidenreich, Executive Director for CEILAP (1989-1991) fundraising for a third edition began and John Swaigen commenced writing a new edition with Deborah Curran, a Trent University Environmental Studies student, assisting in its review to ensure the suitability of the manuscript for university studies. This edition was written during a time in Ontario politics when land use planning legislation did focus on recognising the importance of natural areas preservation and good planning principles. Environment on Trial was published in 1993, the year that the *Environmental Bill of Rights for Ontario* was enacted.

Summary: Part IV Preserving and Protecting Our Resources – Chapter 15: Conservation Covenants, Easements, and Gifts

Within Ontario, if you want to preserve the historical, architectural, archaeological, or natural qualities of your property, you have two options. One option is to donate the land to a governmental agency or a charitable organization that will protect it. The other option, is a way to protect your property permanently without actually relinquishing title to it via covenants and easements. This entails entering into a contract that has been used frequently in North America for fishing areas and duck ponds, and more recently, for certain cherished buildings/ natural heritage lands and privately-owned lands. The Ontario Heritage Foundation (OHF) [now Ontario Heritage Trust] has been involved in negotiating protective contracts over such properties, ensuring the preservation of over 150 properties in Ontario by 1993. Most agreements are simple contracts which bind the signatories but they do not bind anyone else, thus, if the signatory or property owner later sells the property or dies, the agreement would usually not be binding on the future owner. To avoid this issue, there are two special forms of agreements called “easements” and “restrictive covenants”, which bind future owners as well as the present owner and are contracts that can be registered at a local land titles office. The purpose of common law restrictive covenants is to stop the owner from doing something on their land (eg. not to cut wood, backfill, pollute a wetland, etc.). The purpose of a common law easement is to allow someone else to do something on the owner’s land, or basically to allow the easement holder access to the property. For both agreements, two conditions must be met: must own land nearby that is “benefited”, and, must not require the owner to spend money. Another agreement is a statutory covenant/ easement, with the same purpose as either or both of the two other aforementioned agreements. The conditions that apply to this agreement are: that neither of the conditions regarding the other two agreements aforementioned are applicable, and, is available only if

the co-signatory is the OHF or a municipality. Conservation easements are usually restricted covenants, however, both kinds of protective agreements are usually merged together under the name conservation easement agreements, a relatively new concept in Ontario in 1993. A statutory reform, under the *Ontario Heritage Act* (R.S.O 1990, c.O.18), is an agreement that removes the common law hurdles involved. The legislation provides for three classes of signatory who can enter into such agreements with the property owner: the OHF, the Ontario Minister of Culture and Communications, and a municipality. Once one of these parties has executed the agreement, they can assign it to someone else, such as another conservation organization.

Conclusion: In context of the land trust movement, legislative agreements such as conservation easements were in a peculiar stage of adolescence during the time of publishing in 1993, where the strategic nature for implementing them was still coming into fruition. As aforementioned, within the same year of publishing in 1993, *the Environmental Bill of Rights for Ontario* Bill was enacted. This provides another indication that the “environmental” or “green movement” – whereas the land trust movement could be considered a branch – was enhancing the rights of citizens to be more actively involved in land conservation throughout the 1990’s.

Silver, T. M. (1994). Conservation Easements and the Preservation of Natural Areas on Private Lands: A Background Report. Manitoba: Delta Waterfowl Foundation.

The general purpose of this report was to create a document which detailed the use and benefits of conservation easements and covenants, existing law regarding conservation easements and covenants, conservation easement legislation in Canada and the U.S., and issues to consider when drafting legislation.

Summary: Conservation Easement Legislation in Canada – Ontario

At the time of publication of Thea Silver’s book, the primary piece of legislation that pertained to conservation easements and covenants in Ontario was the *Ontario Heritage Act* (R.S.O 1990, c.O.18, s.22). The legislation entails that the Ontario Heritage Foundation (OHF), as well as the Minister of Culture, Tourism and Recreation, may enter into agreements, covenants, and easements with property owners for the purposes of conservation, protection, and preservation of “heritage of Ontario”. Municipalities may also enter into easement agreements for the conservation of buildings of architectural or historical interest but they do not have legislative authority to acquire natural heritage or open space easements. By 1994, the OHF had obtained over 140 easements preserving the built heritage and 12 natural heritage agreements, where natural heritage conservation easements have protected properties ranging from 5-650 acres in areas such as the Niagara Escarpment, Carolinian sites, and Pelee Island. The legislation does not permit a private conservation organization to acquire conservation easements, except in agreement with/ assigned from the OHF. Bill 92, *An Act Respecting Land Conservancy Corporations*, was officially withdrawn in November 1994 but would have authorized the granting of easements to land conservancy corporations for the preservation, conservation, maintenance, restoration, or improvement of significant lands in Ontario. Alternatively, the *Conservation Land Act*, received Royal Assent in December 1994 which would allow for a

landowner to grant an easement to, or enter into a covenant with, a conservation body, “for the conservation, maintenance, restoration, or enhancement of all or a portion of the land or wildlife on the land or for access to the land for these purposes”. Conservation body is broadly defined to include: Federal and Provincial Government and associated agencies; a band as defined by the *Indian Act*; the council of a municipality; a conservation authority; a non-profit corporation that is a registered charity under the *Income Tax Act*; or, a trustee of a charitable foundation that is a registered charity under the *Income Tax Act*. The amendments under the *Conservation Land Act* also provide provisions for assignment of easements to another conservation body or to the Minister if the conservation body holding the easements ceases to exist, as well as, easement registration and enforcement.

Conclusion: During and prior to 1995, the primary legislation that pertained to acquiring and preserving lands in the form of easements and covenants was the *Ontario Heritage Act*, which allowed for only the OHF or a municipality to enter into a conservation easement agreement with property owners. The *Conservation Land Act* in 1994 allowed for a broader range of entities to enter into conservation easement agreements, thus accelerating the land trust movement in Ontario.

Attridge, I. C. (1997). Conservation Easement Valuation and Taxation in Canada. Ottawa, Ontario, Canada: Environment Canada and Canadian Wildlife Service

The purpose of this research is to enhance awareness as to the importance of modifying tax legislation and evaluation policy to favour biodiversity conservation in Canada, as well as, to provide a tool regarding the policy and legislation for the use of conservation easements, covenants, servitudes and land donations in Canada. As stated by Ian Attridge, “This is particularly tricky, because in this context, the landowner in Canada in one of the most significant partners in national efforts to preserve natural heritage lands and our renewable natural resources.”

Summary: Part V Federal Income Tax – Section B: Gifts of Conservation Easements

Federal income tax benefits/ implications can be a pivotal factor in determining whether a landowner decides to grant a conservation easement and may also impose implications on the holding agency. Many conservation organizations are registered charities, and as such, are exempt from federal income tax and can issue tax receipts to donors. Though this latter ability has encouraged donations of land including conservation easements to charitable organizations, the *Federal Income Tax Act* has not encouraged the donations of ecological lands. This is because the landowner was required to pay a tax on the land’s increase in value (capital gain), even though the landowner donated the land and received no money from the release. Landowners did receive a tax credit, until 1997, usable over six years and up to 20 percent of their net income for donations to charities and municipalities or they had the option to value their donation between the market price and the adjusted cost base (ACB). This would only provide partial tax relief with a modest income and the result of this tax system has discouraged many willing landowners who, for tax reason, could thus not afford to donate their lands to charities for conservation purposes. In contrast, the 1995 and 1996 Federal Budget removed related barriers to private conservation, including the 20 percent cap on income tax credits for donations of federally-recognized “ecologically sensitive lands” given to charitable environmental

organizations or municipalities. This means that after the release of the federal 1995 and 1996 Budgets, donors retain the ability to claim the gifts' value against 100 percent of their income and charities designated as crown agencies also benefit from this 100 percent gift claim limit. Particularly regarding conservation easements, all property donations to charities that appreciate over time (i.e. land), and any gifts given in the year or preceding year of death, qualify for tax credits/ deductions usable against 100 percent of the donor's income. This was all made possible through the Ecological Gifts Program, incepted in 1995 by the Canada Revenue Agency.

Conclusion: These types of tax benefits, specifically through the Ecological Gifts Program, that emerged between 1995 and 1997, enhanced the attraction for older private landowners to consider the donation of their property for conservation purposes and supported land stewardship at the local level – where critical and tangible conservation work is initiated by citizens and often has the most impactful results. Properties are not always donated or sold to land trusts under pure altruistic pretenses and money is often a pivotal decision factor, thus the Ecological Gifts Program and other types of tax benefits, in the interest of the landowner, are critical tools for land securement.

Conclusion (1989 – 1997): The introduction of conservation easement agreements within Ontario legislation in 1995 provided the opportunity for a vast range of charitable land conservancy (land trust) organizations to preserve private natural heritage land in perpetuity without full-out ownership. Legislation and land securement practices in Ontario regarding private property conservation easement agreements strengthened over the following years including: property owner/ donor tax benefits (i.e. Ecological Gift Program), standardization of acquisition methods, and the enhancement of these additional securement tools with Baseline Documentation Reports (BDR), new owners signing assumption agreements and monitoring practices.

The analysis of previous legislative options and tools for land securement in Ontario, by many pioneers within the land trust movement, paved the way for the development and implementation of enhanced options and tools throughout the 1990's – many of which are in current use and are continuously being analysed to create efficiencies within the land trust movement. Though there are still many advances which must be made going forward within land securement legislative processes, the land trust movement in Ontario has benefited tremendously from efforts throughout the 1970's-1990's that have shifted, enhanced, and created new law and policy. The implementation of enhanced legislative options and the publication of detailed resources for the formation of land trusts, provided for a vast acceleration within the land trust movement in Ontario during this time.

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2.3 Land Securement History in Ontario from 1999-2016

Literature Reviews by: Chelsea Houston and Cheyenne Wilt

Introduction: The land trust movement has been rising in Canada since the early 1900's, conserving our natural areas in perpetuity. The movement has gone through many stages, with different focuses throughout the years to alleviate land conservation issues and bring public awareness to land conservation. The literature within this review mainly identifies the key areas/goals that NGO's (non-governmental organizations), private and public bodies need to focus on to ensure the continued success of the movement. **From 1999-2016, the focus of the literature relating to the land trust movement was on Canadian legislation surrounding conservation covenants, easements, and servitudes, the use of conservation easements as a traditional land conservation tool as well as a groundwater protection tool, alleviating problems with the tax treatment of environmental philanthropy, controlling urban sprawl, creating natural areas strategies for urban land protection, conducting historical analysis to determine the effectiveness of the movement thus far and goals for the future, as well as distinguishing the differences and similarities between Canada and the US when it comes to land trust operation.** The following annotations provide context to the focus of the movement at this time, and in most cases, offer solutions and frameworks for the future.

George, D.P. (1999). Conservation Easements (CEs) as a Groundwater Protection Tool in Ontario. Waterloo, ON: University of Waterloo. Bachelor of Environmental Studies Thesis

This report provides initial background information about CEAs in general, and more specifically background on how to form a groundwater protection CEA in Ontario. To gain context for writing the report, a literature review was completed to define what a CEA consists of, to differentiate a groundwater easement from a conventional easement. Next, an Internet scan of American land trusts and contact with land trusts and government agencies was conducted to determine CEA activity in the U.S.; in Canada, a cross Canada survey and overview of three provinces and their legislation was carried out. Canadian and Ontario groundwater protection legislation was reviewed, before a case study of two U.S. groundwater protection programs using CEAs was conducted. In Ontario, the case example were the Ontario Heritage Foundation's wetland CEAs. This report was intended to act as a guide for the pilot projects in Ontario.

CEAs are favourable where it is important to maintain long-term protection but private ownership and land management are also desirable. The restrictions involved with a CEA specifically to be used as a groundwater protection tool include that a residential septic system shall not be permanently or temporarily constructed, placed, or introduced onto, above, or below ground of the property. A minimum of five feet must be maintained between any necessary land alterations and the historic high-water table. No more than 3% of the property shall be covered by buildings or impervious surfaces. The sustainable yield of groundwater, as recharge from surface water and infiltration of precipitation should not

be exceeded by on-site water withdrawal. No above ground or underground storage tanks. When the easement involves a wellhead protection Zone 1, there must be a 400-foot radius around a water supply well.

Conclusion: The conclusions of this report are that CEAs are a viable management tool for the protection of groundwater. Although it is a relatively new field, even in the U.S., the Society for the Protection of New Hampshire Forests is a leading organization in using CEAs in the protection of groundwater, and could be referenced throughout the implementation process in Canada. CEAs should not be an independent groundwater protection tool, but should rather be a part of a broader groundwater protection program. Easements should also only be used once a strong understanding of regional hydrogeology has been achieved, in order for CEAs to be used successfully. To pursue a groundwater CEA protection pilot project in the Regional Municipality of Waterloo, a partnership between the Ministry of the Environment, the Ontario Heritage Foundation, and the Regional Municipality of Waterloo should be formed. This initial project could include a natural rural easement and an industrial urban easement, such as in the case studies outlined in the report. Further research should be done into the costs and benefits of land acquisition as a means of groundwater protection, the costs of monitoring CEAs, and how CEA boundaries are delineated.

Byrne, C.L., & Minck, M. (2000). "Understanding the Evolution of Conservation Easement Appraisal Through Case Law". *Appraisal Journal*, 68(4): 411-419.

Conservation easement agreements (CEAs) are not only an increasingly popular approach to land conservation, but also for those looking for tax reductions. For landowners who make a charitable donation of the rights to develop their land, they will receive income and estate tax benefits yet still retain ownership of the undeveloped land. In the 1990's, two main issues emerged in regards to CEAs: the before-and-after approach and the involvement of qualified appraisers. This article examines these issues in the United States, through recent case law developments.

The first issue, the proper application of values to the before-and-after approach, follows a basic formula: the fair market value of the land before the CEA donation minus the fair market value of the land after the CEA donation equals the value of the CEA. This approach has caused many disputes. *Higgins v. Commissioner* was a case in which comparable sales of CEA-restricted properties were used to determine the after value of the CEA. When comparative sales are available, they should be employed over the before-and-after approach. In this particular case, the owners of a similar property donated a CEA and then sold the property. A group of taxpayer's nearby then donated a similar easement, and the IRS disputed the value that they took as a deduction for their donation. Each of the party's experts valued their donated property under the before-and-after analysis, instead of the comparable sale. In situations such as this, evidence of similar sales of properties with CEAs should be used as a starting point for the valuation. This is just one example of the issues that exist with this approach.

The second issue looks at the importance of having experts and appraisers involved in the valuation process, and both statutory and case law address this. Treasury Regulations Subsection 1.170A-14(i) and 1.170-13(c) outline the statutory requirements for valid appraisals. When disputes have come up in the past, the courts have made decisions based solely on what was the most convincing expert testimony, indicating the importance of having a qualified, reputable appraiser value the CEA. In the case of *Schapiro v. Commissioner*, a taxpayer donated a CEA, and determined using the before calculation that the best use of land would be for a subdivision. An expert claimed that the land could be divided into 10 lots, however the IRS claimed the land could only be divided into 2. The tax court heard the testimony of each expert and decided in favour of the taxpayer. This case shows the need for a qualified appraiser in valuing a CEA; problems often arise because courts are not bound to decide with an expert's conclusion. The decisions of the court are increasingly based on the quality of the independent expert's appraisal and testimony.

Conclusion: Conservation easement agreements are not only a key part of land conservation, but also of estate-planning for owners of undeveloped lands. It is important for appraisers to understand the history of case law related to CEAs, and do research before undertaking any CEA assignments. This will help to ensure that our natural areas and open spaces are being preserved, and that landowners can choose what is best for their properties and estates.

Hocker, Jean. (2001, Spring). "Land Trusts: Key Elements in the Struggle Against Sprawl". *Natural Resources & Environment*, 15: 244-247.

This source discusses how the land trust movement in the United States has helped to mitigate the problem of urban sprawl. The mentality that humans want to claim their own space in the world has directly impacted the rate of sprawl, causing it to outpace our actual population growth. This report does not strive to offer solutions to sprawl, other than to say that they will need to be multifaceted and complex. Alternative forms of transportation, the implementation of urban growth boundaries, greater use of compact development, the restoration and redevelopment of brownfields, and changes to the public policies that prioritize development over land protection and conservation are all changes that would help to mitigate the rate of sprawl. However, these solutions all require financial support, and changes to public policy can be difficult to realize. This source focuses on the role that land trusts can play in the United States to curb unbridled development.

The bulk of the source reviews the benefits of land trusts as a land conservation and sprawl mitigation tool. At this time, national, regional, and local trusts had helped to conserve over 17 million acres of open space. The 1998 Census showed that the fastest growing region for the land trust movement were the Rocky Mountain states, including Wyoming, Colorado, Idaho, Utah, and Montana. The number of land trusts in these areas grew by 160% since 1988. The article outlines the different conservation methods that land trusts employ, either through land acquisition (purchase or gift), or conservation easements.

The financing options for conservation acquisitions are explained, including “trade-lands”, bargain sales, raising private money, and fundraising. It is important to note that in order to maintain their tax exempt status, land trusts must be organized and operated to ensure that no action they take benefits any individual or ‘insider’, financially or professionally. Land trusts are beneficial to conservation in ways other than just land conservation; the Land Trust Alliance’s National Land Trust Census reported that 75% engage in environmental education, 46% conduct biological monitoring and a similar proportion undertake ecological restoration, and 60% are involved in land use planning.

Conclusion: In conclusion, land trusts have both short-term, easily tangible benefits and long-term benefits that are more obscure, which will help in combating urban sprawl. They protect habitat and natural lands while promoting economic alternatives to developments such as subdivisions, such as fostering productive farms, sustainable forestry, and limited development. Their results-oriented and business-like approach to conservation draws in people who are not necessarily environmentalists by trade, those who may have a connection to parcels of land. When people voluntarily contribute their time to conserve a place they love, they begin to think more holistically about the threats and costs of poorly planned development. Considering all of these factors, it is clear to see that land trusts will be a key part in the fight against urban sprawl in the United States in the decade ahead.

Watkins, M., & Hilts, S. (2001). *Land Trusts Emerge as an Important Conservation Force in Canada.* Part 1

In this study, authors aim to create a comprehensive picture of the contribution that land trusts have to the conservation of Canadian landscapes. To do this, surveys were sent to 82 land trusts across Canada in order to quantify the area of land that is currently protected by trusts, through either ownership, or assisted landowner management and conservation easements. Their results found that although the movement is relatively new, land trusts have already realized notable success in achieving land conservation at the local, regional, and national levels. Out of the 58 land trusts that took part in the study, 39 of them own land or hold conservation easements and protect over 200 000 acres of land collectively. Additionally, The Nature Conservancy of Canada has protected over 216, 304 acres of natural areas through ownership and easements since 1962. It was found that land trusts also contribute to conservation in Canada through means other means such as environmental education, stewardship programs, and assisted land management activities.

Conclusion: This research is important to this literature review because it takes a look at the early success of land trust movement and identifies that these methods are in fact working when it comes to land conservation. The study confirms that these organizations are on the right track and should continue to work towards land and biodiversity protection (Watkins & Hilts, 2001).

Hilts, S. & Watkins, M. (2002). *The Emergence of Land Trusts as a Conservation Force in Canada (Part 2)*. Guelph, ON.

This report introduces the concept of land trusts to those who were still unfamiliar, the work they do, and details an overview of the land trust movement in Canada. The report includes the results of a national survey of land trusts, which aimed to determine the contribution that land trusts have had to conservation in Ontario. 70% of the known active trusts - 57 trusts - in Canada responded to the survey. National and regional summaries were completed to quantify the number of acres of land protected by CEAs and trust ownership. A provincial summary of the number of land trusts that contribute to land conservation across Canada, and the number of acres of land that is protected in each province. The report then quantifies the contribution that the Nature Conservancy of Canada (NCC), Canada's most prominent national land trust. The number of staff and volunteers within the NCC and other land trusts is included in these summaries and surveys. It was found that local and regional trusts had approximately 79 staff members in total, and the NCC has 55 staff members. Most trusts are directed by a board of about 5-10 volunteers, and additional volunteer members from the community at large also make up a significant amount of the people working within land conservation. New land trusts are typically completely volunteer based.

These surveys provided a glimpse into the programs and projects that have been employed by Canadian land trusts to achieve conservation other than land acquisition and holding easements. In 2002, the current land trust activities and programs included fundraising, education, stewardship support, assisted policy and program development, mapping and strategic planning, and achieving sustainability. In all of the programs and projects that land trusts engage in, their primary conservation objective remains the same - to protect natural areas.

Conclusion: The conclusion of the report details that although the land trust movement was still fairly new, success had already been realized in this sector. Of the land trusts that took part in the national survey, 39 hold CEAs or own land. Collectively, these trusts protect over 200 000 acres of land. On top of this, the NCC itself protects over 216 304 acres of land through both CEAs and land ownership. Further to land ownership and CEAs, land trusts also contribute to the conservation movement in Canada through their other programs and projects. The conclusion then takes a look at some of the issues that faced land trust organizations at this time, which were collected through the national survey and at the National Stewardship Conference: "Caring for Our Land and Water: Stewardship and Conservation in Canada", which was held at the University of Guelph in June of 2000. The main issues and challenges facing the land conservation movement at this time were property acquisition and management, professional development and assistance programs, organizational sustainability, gathering data, and the need for a national organization.

Heidenreich, B. (2001-2003) Evergreen Common Grounds Research Report Series on Urban Land Trusts. Toronto: Evergreen (2001 – 2003)

What is an urban land trust? *A locally based independent charity with a natural and/or cultural conservation mandate that focuses on securing partial or full legal interest in land in order to conserve or manage it. Urban land trusts operate in cities and on the urban fringe.* In 2001 Evergreen proceeded to undertake a feasibility study on the role and long-term opportunities for urban land trusts mandated to conserve natural and cultural sites in urban and urbanizing Canada. There were models for land trust and government partnerships ranging from the Central Park Conservancy’s operational role for New York’s Central Park, The Trust for Public Land, to the National Trust (UK) and many more which were studied. The research included their legal status, mandate, fundraising mechanisms and revenue sources which were reviewed and application within the Canadian context considered. The research reports provided below were seminal in leading to the formation of the Edmonton and Area Land Trust in Alberta, the Western Sky Land Trust in Calgary and the Evergreen partnership with the City of Toronto and Toronto Region Conservation Authority in the formation of Evergreen Brick Works from the rubble of the former quarry and industrial Don Valley Brick Works located in the Don River Valley in Toronto.

Evergreen Common Grounds Land Trust Research Report Series -2003

No.	REPORT	CONTENT AND PURPOSE
1	Urban Land Trust Primer	Describes what an urban "land Trust" is, how land trust activities in urban areas differ from rural / wilderness areas, basic financing and securement tools Status: Completed (Barb Heidenreich)
2	Canadian Land Trust Survey: 2001 Needs Assessment	A needs assessment of Canadian Land Trusts, including their areas of interest, land preserved, institutional capacity, and obstacles to achieving their mission. Status: published (Stewart Chisholm; Louis Tinker; Barb Heidenreich)
3	Land Trust Governance and Financial Models	A review of international & national land trust models -- their legal status, mandates, governance, organizational structure, fundraising mechanisms, & revenue sources. Includes Canadian (Nature Conservancy of Canada; Ducks Unlimited; Parks Foundation, Calgary; Ontario Heritage Foundation; and Conservation Authorities), US (Trust for Public Land, Conservation Fund; Central Park Conservancy), and UK trusts (National Trust; Groundwork Trust) The purpose of this research is to determine the most effective model for a national urban land trust in Canada. Status: Completed (Barb Heidenreich)
4	Parkland Dedication requirements under provincial community	A comparative review of the parkland dedication requirements of provincial planning legislation across Canada. Status: completed (Louis Tinker; Barb Heidenreich)

	planning Acts	
5	Canadian Easement Legislation	A summary of conservation easement legislation by province: what lands qualify, legal obligations, enforcement, etc. Status: <i>supplied to Arlene Kwasniak (2004), Environmental Law Centre</i>
6	Provincial and federal tax incentives and barriers to natural areas conservation	Report on current federal and provincial tax incentives and disincentives to conserving nature, what kinds of lands they apply to, and their impact on land protection. A joint initiative between Evergreen and Nature Conservancy of Canada, edited by Marc Denhez. It updates a report completed in 1992 (Denhez, Marc. 1992. "You Can't Give it Away". North American Wetlands Conservation Council, Issues Paper No. 4.) Status: <i>Completed (Mark Denhez -author; Coordinators: Thea Silver- NCC; Barb Heidenreich - Evergreen)</i>
7.1	Valuing Natural Areas and Open Space: Part I - Ground Works	An assessment of the ecological, economic and social/health benefits of nature in cities. Status: <i>(published) Evergreen: <u>Ground Work: Investigating the Need for Nature in the City</u></i>
7.2	Valuing Natural Areas and Open Space Annotated Bibliography	An annotated bibliography of peer reviewed research that puts an economic value on open space in wilderness, rural, and urban/sub-urban areas. Status: <i>completed (Barb Heidenreich & Lois Lindsay)</i>
8	Municipal Survey on Open Space Acquisition and Stewardship	Report on research results and case studies, based on 30 interviews with municipal parks and recreation department staff. Addresses the legislative framework for open space acquisition by various means, including transfer of development rights, land swaps, Conservation Development, and other tools. Will also include a tool kit on "best practices" (tools that promote smart growth that conserves ecological features). Status: <i>completed (Stewart Chisholm; Lois Lindsay; Louis Tinker; Melissa Watkins)</i>
9	Land Securement Mechanisms for Conserving Natural Landscapes in Urban Canada	A catalogue of legal and planning mechanisms for the protecting natural sites in urban and urbanizing areas. A resource document for Land Trusts, particularly those operating in settled areas in Canada. Status: <i>Completed (Barb Heidenreich)</i>

Dyment, J.E. & Rosenthal, J. (2002). "Designing a System of Urban Protected Areas: An Evaluative Case Study of Peterborough, Ontario". *Environments*, 30 (1), 1-19.

This article evaluates the ten-year process of completing the Peterborough Natural Areas Strategy, and the success of this project. Natural areas in urban centres can help to maintain biodiversity, and can contain important ecological features. To create a system of protected natural areas in Peterborough, a six-step process was employed, which included: 1) the formation of a steering committee; 2) conducting an inventory of the natural features of potential protected areas; 3) consultation with public to promote awareness; 4) amendments to the draft Official Plan policies; 5) seeking formal approval of Official Plan amendments, and; 6) the formation of a Natural Areas Advisory Committee. The Strategy was evaluated by comparing the Peterborough Official Plan policies between 1984 and 2000. This comparison looked at whether the original eight goals of the Strategy were met, and reviewed the recommendations that key representatives who took part in the creation and implementation of the Strategy.

The methods employed in evaluating this Strategy involved an evaluative case study, informal interviews with key individuals involved in the Strategy creation, natural areas were visited, and the city council meeting in which the natural areas policies were accepted was attended. Over 60 historical documents about Peterborough's Natural Areas Strategy were also reviewed, some of these being Official Plans, planning reports, local newspaper articles, correspondence among stakeholders. These documents were reviewed to document the development of Peterborough's system to protect the city's urban natural areas, and to reconstruct the history of the Natural Areas Strategy through successive approximation. Reconstructing the history initially involved reviewing 15 key documents belonging to one of the Strategy founders. These documents were reviewed in chronological order at first, but as gaps in the information were recognized, informal interviews and additional documentation provided by the interviewees were also reviewed. The resulting sequence of events that was compiled was verified through informal interviews with five of the main stakeholders who created the Peterborough Natural Areas System.

Conclusion: In conclusion, the report found that the Strategy was successful in securing protection from development for ecologically important lands, strengthening the policies in the Peterborough Official Plan, and providing linkages between natural areas that could be used for recreation. However, the temporal scale of the process in Peterborough was so incredibly efficient, and offers other municipalities lessons in creating urban protected areas strategies that are more ecologically protective in a timelier manner. Some other areas of the Strategy that could be improved include more applied habitat protection and enhancement activities, including naturalization, habitat restoration, land stewardship programs and environmental education programs. The ecological impact of the Strategy has not been determined, and more field research is required. The Strategy will ultimately act as a foundation for other communities to create their own strategy.

Denhez, M. (2003). *Giving Nature it's Due: Tax Treatment of Environmental Philanthropy: Recent Improvements, Remaining Barriers and Current Opportunities.*

<https://nawcc.wetlandnetwork.ca/givingnature.pdf>

Until the early 2000's, the tax treatment of land donations and easements were a considerable disincentive for people to contribute to conservation. This report takes a look at the problems related to taxing of environmental philanthropy, and ways that these challenges can be mitigated. The paper focuses on lands within the provinces, because at the time of publication the number of privately-owned lands north of 60° was very low. Lands quantified in the report fall into two categories; lands that are owned and managed by environmental charities (such as conservation authorities), and lands owned by individuals that are subject to special conservation agreements. Ecologically sensitive lands are the primary focus of land conservation, and therefore the report, but urban greenspaces, cultural landscapes, brownfields, and other lands are also taken into consideration. The Canadian environmental community determine what the most pressing barriers to conservation were at this time. Ongoing capital gains liability, confusing tax treatment of easements, covenants and servitudes, functional exclusion of inventory lands from land conservation, and property tax liability are all issues that impeded environmental philanthropy. This paper was written with the hope that it will aid in systematizing the subject more effectively, making the overall approach more coherent, and improve the connections between public policy and the tax system. It is anticipated that the ecologically sensitive lands will experience the greatest benefit from changes to these areas, as well as other landscapes.

The report provides proposed changes and solutions to these barriers. In regards to ongoing capital gains liability, the suggestion is to exempt all donations of ecologically sensitive land from being subject to capital gains. This was initially proposed in 1994, and was brought back to the table as a solution in 2002. This change would greatly contribute to reaching the national goal of protecting 12% of Canada's landmass, and would help to engage private owners more intensely into land conservation. Gifts of inventory land from developers experience a much higher tax liability than any other land donations. The tax improvements of the years previous to this report neglected this detail, although developers hold most of the property that is under immediate threat, and they face the greatest disincentives. Mitigating the tax liability developers face for their donations would solve many Canadian environmental disputes. The confusing tax treatment of covenants, easements, and servitudes was another barrier. This was because if the donation of an easement reduced the appraisal of the property, the reduction was receiptable. However, these agreements were split into two categories: those that were ecological were linked to ecological gifts and subjected to the same tax treatment, and easements that were not strictly 'ecological' regressed in their tax treatment.

Conclusion: This system needs simplification. Lastly, property tax liability was an issue in some provinces, where lands owned and protected by environmental charities were in an inferior tax position to any other land uses. Regardless of the fact that they draw on municipal services far less than other uses. Creating exemptions for these lands would have

a beneficial impact on environmental philanthropy. It is hoped that if these changes are implemented, and the tax treatment of environmental stewardship is improved, there will be increased participation by Canadians in the protection of our natural areas and conservation of our land.

Atkins, J., Hiller, A., & Kwasniak, A. (2004). *Conservation Easements, covenants, and servitudes in Canada*. North American Wetlands Conservation Council,1-139.
<https://nawcc.wetlandnetwork.ca/conseasecov04-1.pdf>

The purpose of this report is to update *Canadian Legislation for Conservation Covenants, Easements, and Servitudes* (Silver et al. 1995), examine the tax implication of entering into easements, covenants, or servitudes, addresses challenges associated with drafting covenant or easement legislation and finally survey Canadian and American case law to help identify areas for improvement in both legislation and conservation agreement documents. Authors utilise secondary research to complete this report and relied heavily on the Canadian Legislation for Conservation Covenants, Easements and Servitudes in order to complete their work. The study is separated into 8 parts. Part 1: What are conservation easements, covenants and servitudes? Parts 2: Conservation easement, covenant and servitude legislation in Canada. Part 3: Tax Considerations. Part 4: Conservation easement legislation in the United States. Part 5: Drafting conservation easement legislation. Part 6: conservation easement in the courts. Part 7: Drafting conservation easement documents. and Part 8: Future directions. In conclusion, the authors describe the legal basis for the use of conservation easements, covenants and servitudes in Canadian jurisdictions and summarise issues to consider when drafting conservation easement legislation. Authors successfully update the 1995 Canadian Legislation for Conservation Covenants, Easements, and Servitudes and provide descriptions of obstacles still left to address. Authors provide future directions based on trends to date.

Conclusion: The report by Atkins, Hiller and Kwasniak is important to this review because it updates the “Canadian Legislation for Conservation Covenants, Easements, and Servitudes” which was published in 1995. Since its publication, there has been an increase in the use of statutory based easements and covenants for conservation purposes across Canada and more legislation has been introduced. Thus, the land trust movement has matured between the 1990’s and 2000’s and this report summarises more current affairs which is important when it comes to tracking the success of the movement. (Atkins, Hiller & Kwasniak, 2004)

Paris, K. (2004). *Measuring the Effectiveness of Conservation Easement Programs*. Nature Conservancy of Canada,1-46.

This study examined a number of options that may help land trusts to ensure conservation easements survive and remain effective in perpetuity. The importance of a land trusts’ succession is examined to ensure the durability of easements after they cease operations. Expropriation of conservation easement lands has occurred in the US, and the potential for this phenomenon in Canada is explored. Finally, collective easement defence is presented as an emerging concept in the US to ensure long-term easement monitoring

and defence. The author completed this review by using secondary research methods and recommends several areas for carrying this work forward including: (a) Convening a representative group of the Canadian land trust community to discuss the need for revisions to current Standards and Practices (S&Ps), whether standards should be national instead of provincial, and how to ensure compliance with standards; (b) The need for further, in-depth research on the legal challenges to the endurance of conservation easements in perpetuity followed by the exploration of whether land trusts (small ones in particular) would be well-served by some type of collective easement defence mechanism; (c) Sharing further information and data and stepped-up monitoring of the use of conservation easements in Canada. In conclusion, the author states that the Canadian land trust community should prepare itself by considering new ways to more accurately measure and understand its practices as the events in the US land trust community may be an indication for the events to come in Canada. The paper also notes a number of areas for potential further research, discussion, and action. There is much to celebrate in the achievements of the Canadian land trust community, as young as it is. It is hoped that this analysis will lend itself to the further development of land trusts to help preserve Canada's ancient, unique natural heritage. This information is extremely beneficial to this literature review as it identifies how Canada can avoid the expropriation of vital conservation lands.

Conclusion: The study is important because it identifies how to ascertain the prolonged effectiveness of easements in Canada (Paris, 2004). See also (K. Paris 2005) "Best Practices and Performance Measures (BPPM) for Conservation Easement Programs"

<https://olta.ca/wp-content/uploads/2013/03/BPPM-report-final.pdf>

Evergreen Common Grounds (2005). Keeping it Green: A Citizen's Guide to Urban Land Protection in Canada. <https://www.evergreen.ca/downloads/pdfs/Keeping-It-Green.pdf>

This report was designed to act as a practical guide for urban citizens and community groups who strive for Canada's cities and towns to include healthy natural areas. The report guides the reader through the land use planning process, and when in this process it is possible to make your voice heard. It also presents a brief overview of various other land protection options, as well as how to successfully manage your organization to turn your efforts into a community-wide movement. The multi-stakeholder and complex nature of land protection in urban areas is emphasized, and partnership-based approaches are encouraged. Through community and group-based efforts, it is possible to transform even degraded areas into thriving natural spaces. The document includes an outline of the steps in a land protection project; how to get started, gather basic information about the land you are attempting to secure, how to build alliances, and how to build an action plan, complete with a problem description, goals and objectives, strategy assessment, outreach plan, and capacity development. It also provides a guide to the land use planning process, real estate tools for land securement, organizational governance, fundraising to protect green space, communications and media relations, partnerships for land protection, partnership models and best practice. The information provided about creating partnerships is perhaps the most valuable to provide to organizations. Evergreen looks at partnerships as an opportunity to yield a significant return on your investment of time and effort and to work

with organizations who are typically not involved in the environmental and conservation sector. They suggest looking at partnerships as a 'way of doing business', and using a more generalized approach for all partnerships to ensure that you are capitalizing on the number of partnership opportunities you are pursuing.

Conclusion: The document emphasizes open communication and clear roles and expectations as being key components in a successful partnership, before it goes on to suggest some organizations that could be considered for partnerships: public agencies, environmental groups, social service agencies, private companies, cultural societies, and social clubs or faith-based groups. The goal is that in working with such a diverse field of partner organizations, more credibility will be lent to the project and will help to raise the organization's public profile. All of the benefits of creating meaningful partnerships will contribute to land conservation, and aid community groups in protecting their natural areas.

Campbell, L. Rubec, C. (2006). *Land Trusts in Canada: Building Momentum for the Future.* Wildlife Habitat Canada,1-26.

This study provides an overview of the status of land trusts in Canada as of early 2006 and was designed to advance discussions in support of the creation of the Canadian Land Trust Alliance (CLTA). The report provides background information on some of the key issues and challenges for further development of the land trust movement in Canada and is supported by the stewardship section of the Canadian Wildlife Service, and Environment Canada in cooperation with Wildlife Habitat Canada. The purpose of this report is four-fold as follows:

- 1) to explore issues, trends, and opportunities associated with land trusts.
- 2) to provide a snapshot in time of the goals, mandate, tools and programs of Canada's land trusts in 2006.
- 3) to identify a potential vision for the land trust movement, while painting a picture of where it could be in 10 years, based on suggestions by land trust representatives.
- 4) to discuss the potential roles of the Canadian Land Trust Alliance as a key mechanism for strengthening the land trust movement in Canada, with the ultimate goal of enhanced conservation and protection of fragile ecosystems across the landscape.

In order to fulfill the purposes of this report, authors utilised secondary research and drew upon current literature, research, interviews, and the results of national workshops held in October 2004, March 2005 and February 2006. In conclusion the study found that the Canadian land trust movement is alive and well with an exciting future ahead. It is proposed that if coordinated, led and resourced correctly, the establishment of a Canadian Land Trust Alliance could play a key role in making the vision for the Canadian Land trust movement a reality. It is found that an Alliance would provide a collaborative voice for land trusts across Canada and address issues common to organizations of different sizes, focus and needs. An Alliance could also work to broaden understanding of trusts and provide a voice on national policy issues for organizations that do not have access to one of the three provincially-based alliances in British Columbia, Ontario, and Quebec. The study ruled that the expected establishment of a Canadian Land Trust Alliance in 2006 will not only enhance networking

among land trusts, but also help to strengthen the overall movement and its ultimate success in meeting their long-term vision.

Conclusion: This study is important to this review because it “builds momentum for the future” and articulates particular goals for the future of the Canadian land trust movement, along with the tools needed to meet said goals. The report also advances the idea of establishing a CLTA which would significantly improve the land trust movement in Canada (Campbell & Rubec, 2006).

Heidenreich, B., & Albanese, M. (2006). The Baseline Documentation Report (BDR) for Natural Heritage Properties and Natural Heritage Conservation Easement Agreements. Toronto: Ontario Heritage Trust and Ontario Land Trust Alliance.

The original document, “The Baseline Documentation Report (BDR)”, was prepared in 1997 by Jason Thorne with the Ontario Heritage Foundation and was updated in 2006 by Barbara Heidenreich with the Ontario Heritage Trust (OHT) and Michelle Albanese with OrLand Conservation, with the support of many others from OHT, Ontario Land Trust Alliance, and the Nature Conservancy of Canada. This document is intended to encourage consistent high-quality documentation of sites by the growing land trust movement in Ontario and indicates that the proper preparation of a BDR is essential for effective property stewardship and for the enforcement of conservation easement agreements.

Summary: Section 1.0 Introduction – Section 7.0 What Should be Included in a BDR?

A BDR is a document which records the ecological, physical, and cultural features of a property and its uses, upon the point in time which the property was field (in-situ) inspected. The time of completion of a BDR should coincide with the time a property is secured for conservation purposes either through its purchase or the placement of a conservation easement agreement over the property by a land trust. For privately owned properties that remain so and whose natural heritage values are protected by a conservation easement agreement held by the land trust, the BDR “serves as a factual legal document providing an accurate description of the features of the property and their condition at the time the conservation easement agreement is registered on title. It ensures that both the landowner and the conservation easement agreement holder are fully aware of the specific features that are to be protected and their current condition.”. Thus, the BDR serves as a significantly important source for enforcing conservation easement agreement restrictions and related land management and “a well-executed BDR will facilitate monitoring for biological and anthropogenic change as well as for compliance. In effect, it is the first monitoring report. It provides a common reference point for future inspections”. There is no legal obligation to compile a BDR on a property for a conservation easement agreement, unless specified in the agreement. The responsibility therefore falls upon the party whom benefits most from compiling the BDR – that being the agreement holder. Since a BDR attached to a conservation easement agreement would serve as a legal reference point, the increased skill and detail level of a trained layperson/ consultant becomes more necessary.

Conclusion: The Baseline Documentation Report (BDR) Manual provides pertinent information on how to prepare a BDR for natural heritage lands owned by a land trust and natural heritage lands subject to a conservation easement agreement held by a land trust, including templates and guidelines for BDR completion under each circumstance. The

emergence of the BDR during the late 1990s has proved to be an essential source, to be utilized in conjunction with conservation easement agreements, for land trust organizations in the perpetuated preservation of natural heritage land

Rissman, A., Lozier, L., Comendant, T., Kareiva, P., Kiesecker, J., Shaw, M., & Merenlender, A. (2007). "Conservation Easements: Biodiversity Protection and Private Use". *Conservation Biology*,21(3), 709-718. doi:10.1111/j.1523-1739.2007.00660.x

In this report, authors surveyed the staff responsible for 119 conservation easements established by the largest non-profit easement holder, The Nature Conservancy in order to address gaps in knowledge. Despite their increased use, little quantitative data are available on what species and habitat conservation easements aim to protect, how much structural development they allow, or what types of land use they commonly permit. From the 119 easements surveyed, 80% aimed to provide core habitat to protect species or communities on site and nearly all were designed to reduce development. The easements allowed for a wide range of private uses, which may result in additional fragmentation and habitat disturbance. On 85% of easements sampled, some residential or commercial use, new structures, or subdivision of the property were permitted. 56% allowed some additional buildings, of which 60% restricted structure size or building area. Working landscape easements with ranching, forestry, or farming made up 46% of the easement properties sampled and they were more likely than easements without these uses to be designated as buffers for enhancing biodiversity in the surrounding area. Their results demonstrate the need for clear restrictions on building and subdivision in easements, research on the compatibility of private uses on easement land, and greater public understanding of the trade-offs in the use of conservation easements for biodiversity conservation.

Conclusion: This research is important to this literature review because it highlights areas that still need to be improved when it comes to conservation easements. Even though they are proving successful, there is still some work to be done and this paper identifies the main areas that NGO's (non-government organizations) need to focus on to ensure the continued success of conservation easement for biodiversity conservation (Rissman et al, 2007).

Peterson, P. (2009). "Development Rights and Land Use Regulation in Canada". Ontario Land Trust Alliance (paper),1-10.

This study reviews the law of private property and development rights in Canada. It also contrasts the legal remedies available to land owners in Canada with the constitutional protection of property rights in the United States. The focus of the study is on the use of zoning and land use regulation in Canada to achieve public policy objectives for the protection of open space and natural areas. The author utilized secondary research to complete this work. Some of the resources referred to within this study include; The *Constitution Act*, the *Canadian Bill of Rights* (S.C. 1969, c. 44), the US Constitution, zoning bylaws, the supreme court of Canada, provincial legislature and more. In conclusion the author found that Canadian courts have consistently recognized the broad authority of the zoning power in Canada to ensure that the 'common good' is paramount and have refused to constrain it or to decide that private owners are entitled to compensation. It is also found

that Canadian land use regulators are less constrained than legislatures and municipalities in the United States where private property rights (unlike Canada) are enshrined in the United States Constitution under the Fifth Amendment which includes a provision known as the Takings Clause. Despite the broad legal powers available to municipal governments and administrative tribunals in Canada however, it can be said that those powers are generally exercised with restraint keeping in mind other municipal objectives for economic prosperity, the provision of services, public health and the reasonable use of private lands. Peterson also highlights that land use regulation bylaws in Canada could go further in the direction of environmental and natural area protection than they actually do. Peterson also finds that the constraints in Canada are primarily cultural, political and self-imposed policy limits and says there are legal limits – but the legislatures and municipal councils of the country respect cultural, historical, political and policy constraints that lie comfortably within the legal limits.

Conclusion: This study is important to this literature review because it identified the main land use constraints in Canada and highlights key differences between the US and Canada when it comes to legal remedies which can be used as precedence when developing future legislation. It also shows that regulation bylaws in Canada have the potential to be more environmentally rigorous than currently applied (Peterson, 2009) and far more rigorous than the USA due to the inheritance in Canada of a British based constitutional entrenchment of government's need to focus on "the common good" unlike the US entrenchment of private property rights.

Aslam, F., & Bunce, S. (2016). "Land Trusts and the Protection and Stewardship of Land in Canada". *Canadian Journal of Urban Research*, 25(2), 23-34.

This paper explores the mandates of non-government land trust organizations in Canada, the role of urban land in current land trust practices, and possibilities for the inclusion of land protection and stewardship in Canadian cities through a discussion of the community land trust (CLT) model. Through the creation of an inventory of Canadian non-governmental land trust organizations, authors demonstrate that the majority of historical and contemporary land trust organizations focus on the protection and conservation of wilderness and rural lands, with limited focus on the protection and stewardship of existing urban lands. Authors suggest that the CLT model (community land trust), already in existence in several Canadian cities, offers a way to re-frame this emphasis and to encourage non-governmental and community-based urban land protection and stewardship in order to resist increasing land values and provide necessary community benefits that foster equitable access and affordability.

Conclusion: This study is important because it examines how land trusts and easements can be beneficial to urban areas and not just more natural or rural landscapes. It highlights the idea that all land can be protected and conserved with the use of a land trust and that this type of system could greatly benefit any community and its surrounding ecosystems. This concept is a good future goal for the land trust movement in Canada. (Aslam & Bunce, 2016). When it comes to summarizing the land trust movement in Canada between the years 2001 and 2019 there are found main topics needing to be discussed that include, the

history and effectiveness of the movement, goals for the future of the movement, updated legislations and differences between the Canadian and US movement. Additionally, the possibility of the CLTA and types of and use constraints should be discussed.

Final Conclusion: The main focus of the land trust movement in Canada between 1999 and 2016 was on **Canadian legislation surrounding conservation covenants, easements, and servitudes, the use of conservation easements as a traditional land conservation tool as well as a groundwater protection tool, alleviating problems with the tax treatment of environmental philanthropy, controlling urban sprawl, creating natural areas strategies for protection in urban area, conducting historical analysis to determine the effectiveness of the movement thus far and goals for the future, as well as distinguishing the differences and similarities between Canada and the US when it comes to land trust operations.** This being said, all of the legislation found in this review can be utilised to advance and improve the conservation land trust movement within Canada.

3.0 Interviews

3.1 Introduction

Interview questions were generated by the contributors to this report to document the interviewee's personal involvement in the Land Trust Movement, motivation for involvement, and knowledge of acquisition strategies and best practices. The purpose of these interviews is to preserve the knowledge of key members of the land trust movement, while the information is available and can be shared. Unfortunately, there are many missing key individuals who are not included: Stewart Hilts, Peter Mitchell, Bob Barnett, John Riley, John Lounds... the list is long and we hope that this project will continue into a second volume before OLTA reaches a quarter of a Century! By collecting this information, the history of the land trust movement and its evolution throughout the 20th century and into the 21st century can be used to further enhance conservation practices in Ontario. Additionally, by documenting personal experiences from key members of the land trust movement, their work and achievements can be understood and referenced as the conservation and land trust movement continue to grow.

Interviews were considered necessary for this project as early conservationists and founders of both OLTA and its member organizations are aging, some have passed away, and the history, archives and resource materials of this impressive network have not been fully documented or preserved. Interviews were conducted electronically, transcribed and sent two the participant for review. The following transcribed interviews conducted in 2019 by Martina Albert, Chelsea Houston, Mara van Meer, Cheyenne Wilt and continued in 2022 by Brianna Pitt, provide the opportunity to both identify and preserve knowledge, present this knowledge in an accessible format, and identify key motivations for conservation leaders.

3.2 Transcribed Interviews/Biographies

3.2.1 Ian Attridge Biography and Interview



Ian Attridge biography from the OLTA website (<https://olta.ca/who-we-are/board-of-governors/>):

Ian Attridge, Campbell Clan, is a settler living in Peterborough (Nogojiwanong), Michi Saagiig Anishinaabeg territory. As an ecologist and lawyer, he practices and teaches environmental, non-profit, planning and trails law and has authored numerous publications and policy submissions. Ian has led the development of the legal framework for land securement and related tax incentives in Ontario. Over his 35-year

career, his work has directly protected over 18,000

acres of private and public lands and helped form or update more than 20 organizations, including the Kawartha Land Trust. He was formerly Vice-Chair of OLTA's predecessor, the Ontario Nature Trust Alliance, and Chair of Government Relations. He continues to learn from Indigenous people and others, and enjoys outdoors activities, singing, and fostering community.

When did you first get involved with the land trust movement? (When did you first become interested in preserving natural lands/ becoming a part of the land trust movement? Why?)

- It's always been something that is important to me; I grew up next to a conservation area, I would spend a lot of time in a protected place.
- Undergraduate at University of Guelph, worked with professor Stew Hilts. Got involved in conferences and events, continued to be involved in various ways after that.
 - Undergrad: 1981-1985, Resource Management & Ecology - bridging between the Agricultural and Biological College.
 - Field work in bogs and fens across Southern Ontario - 1984/1985.
 - Probably around 1984/1985 that I started learning about land securement and talked to professionals.
- Been involved in developing the legal framework and practice of land securement.
- I've evolved with the movement over a long period of time.

What changes in policy (in your opinion) have had the greatest impact on the land trust movement (either negatively or positively)?

- The Conservation Land Tax Incentive program is one, it started in 1985 and made a big difference. It meant that owners of ecologically significant lands received a tax deduction.

- In 1995 the *Conservation Land Act* amendment that allowed for easements - really important policy development, intimately involved.
- In 1995 the Ecological Gifts Program was passed, started to eliminate capital gains on donation of lands.
- Changes to the *Income Tax Act* to allow for American charities to be recognized as equivalent to a Canadian charity. This aids Americans who own land in Canada and donate the land for conservation because they are able to take advantage of the tax benefits.
- There was a group of agencies banded together called the Natural Heritage League when I was newly graduating in 1985 and involved with Stew Hilts attending conferences. I was doing some summer work with the Ontario Heritage Foundation, working with Stuart Mallany, saw some of the work on the Conservation Land Tax Incentive Program (called the Reduction program at the time). I was the one who really led those easement provisions in the *Conservation Land Act*.
- Harris Government was looking to figure out how to make things more efficient and avoid red tape. Involved in the development of conservation easement agreements and land trust act. Easements are one way to streamline the ownership of a parcel of land. I argued for it. I really had to work hard to rationalize it in the government, it took a lot of internal work to get them to keep it and implement it. When passed, it got trumpeted. Developed the rationale in working with the lawyers with Ontario Legislature to draft the legislation. I have written many of those types of agreements with land trusts over the years. Involved in rationale and working with lawyers to draft legislation, applied as part of numerous land trusts.
- Eco Gifts: When it came into federal play, the broad idea of what was quantified as significant lands. Working at the MNR at the time, we sat down and very quickly had to put together detailed criteria that would outline land in Ontario that would qualify as EcoGifts. List of all the designations that a parcel of land can have. That came down a Thursday or Friday before a strike was about to start in early 1996, knew the government would be limited in what they could do when the strike happened.
- Community Conservation Lands: worked with a number of conservation groups, argued that this criteria should be equivalent to EcoGift program, reduced property taxes for land trusts when they acquire parcels of land.
- Prescribed done: changes to allow Americans to hold land, working with Nova Scotia Nature Trust, one of the first people to talk about these types of programs. Advised the NSNT on their manual and eventually got implemented.
- All of the above programs working generally well, number of small glitches and gaps and procedural steps that don't allow them to work as thoroughly or smoothly as they should.
- Other types of mechanisms that would help land trust movement: how to acquire land, tax incentives, financial support. Existing ones need tweaking and some are not there yet. In some other jurisdictions, it is more straightforward - low cost and at a quicker rate.

In your opinion, what is the most effective method for land securement?

- Donation of the land, of the outright title - best for land trust in most cases, unless there's a high annual property tax on the property.
- For the landowner, conservation easement agreement - they can have their cake and eat it too. They can hold the land, but also protect it forever through that agreement. They have a relationship, with support, resources, volunteers, expertise, available to both the land trust and landowner.

What has been your most fulfilling experience working in land trust conservation?

- Having a role in protecting and establishing Kawartha Highlands Provincial Park, largest park in Southern Ontario. It's a neat park, it had a lot of wrinkles and a lot of effort to try to get it to the point it's at now. Certainly, a really worthwhile experience.

What direction would you like to see the movement go in? (In what ways would you like to see the land trust movement evolve going forward?)

- Myself and others are working right now to better connect the movement to Indigenous and First Nations peoples - I think there's a lot that can be done on that front to develop more of a partnership, that is more informed by Indigenous priorities, TEK, helping in returning land in the use, control, and relationship of Indigenous people.
- There are a lot of younger people in the movement, but I would certainly encourage that to continue. Referenced guest speakers in C4P class. Having educational seminars such as that in the Credit 4 Product class with Barb, Kristie, and Susanne, that kind of a program and fostering a stronger connection with younger professionals like yourselves in the movement is really an important direction to go. Most people involved in the movement tend to be retiring or getting older, but to have younger folks involved, that will keep it vibrant, creative, tech-savvy, and relevant. Also to diversify the movement, and to find ways to connect to new Canadians and different ethnicities so this movement - it's not exclusively white, but it tends to be more white than other movements.
- When I look at the new standards and practices coming from the OLTA, to be more professional in the industry, be as good as we possibly can be, because there will be times when there will be storms (challenges to a big piece of property, problems with gov't). As a movement, we should have a better connection with government.
- On Indigenous side, building relationships between land trusts and local First Nations, needs to be more well-developed, in most cases not a close or robust relationship. Employing Indigenous youth, working/building a trust relationship so land trusts can help with Indigenous priorities, ultimately it is to establish a few Indigenous land trusts that will be working on their own priorities within the larger movement. Land trust movement from initially an ecological focus, but now looks at agriculture, cultural heritage. Diversification of some of those functions will be quite useful in the larger movement.

- Youth: guest speakers that the C4P class has heard, more formal relationship, internships, recognition, find ways to support young professionals through the full arc of their career. To create a diversity of pathways and supports to enable that to happen for younger folks.
- Diversity around ethnicities: saw a presentation at the OLTA gathering last fall by CVC, lots of suggestions about how to connect to new Canadians. I'm a middle-aged white guy, born in Ontario and grew up here, just so you know where I'm coming from, I see the real value in involving multiple talents, and multiple types of people, from different professions, backgrounds, experiences, ethnicities. Would only enrich the movement, gain support, financially and increase the importance of land trusts in communities.

Who in your opinion has had a major impact on land trust conservation in Canada/Ontario?

- Stew Hilts, Ron Reid, Charles Sauriol, and Mac Kirk - involved in land securement in the early days and really created a path for us to follow.
- Land trusts and conservation authorities, parallel movement with conservation authorities, conservation acts may be reviewed by the provincial government.

What steps do you feel still need to be taken to ensure land trust conservation success?

- As someone who's worked on the policy and legal side for a long time, I still think there are improvements to be made in policy and legal framework.
- Often the need to enhance or stabilize sources of funding, for specifically smaller land trusts, donor base is small, funding can come and go. Hard to sustain that, to take on the full potential of what a land trust can be.
- Some consolidation among land trusts might be useful. In some cases, small and largely volunteer-driven, hard to get that funding base to make that long term commitment to landowners.
- Be as professional and good as we can be in standards and practices. I know how hard this can be, I helped the Kawartha Land Trust (KLT) to be initiated, watched it grow.
- KLT - established across the Kawartha region as a 'bio-regional land trust', idea was to imagine having sufficient geography and population and financial support to make it viable in the long term.

What changes would you make, if any? (be it to policy, legislation or the movement in general)

- Consolidation of land trusts.

What has been the biggest challenge(s) you've faced personally or as part of an organization, pertaining to land securement?

- It's probably the most complicated land securement deal I was involved in, acquisition of Boyd/Big Island by KLT - end of 2014/2015. Had to raise 1 million

dollars in 6/7 months. We had to raise the money to establish an endowment fund, very tight timeline to deal with some land use planning changes to allow property to be donated, community that really wanted to protect the property but had super diverse ideas. There was planning stuff, a number of funding challenges. Some big personalities involved, some tight timelines, even getting the EcoGift designation, so many wrinkles in that project. I was tracking about 8 different dimensions of the deal. Came together at the last minute, pretty exciting to help protect it. I worked about a decade before with cottagers and people around the lake to protect the island when it was subject to a development application, knew what it meant to the community. Planning stuff, large personalities involved, tight timelines, ecological gift certification, appraisal confirmed. Each project has its own wrinkles and challenges for sure. Personally, I felt like we were working for 7 months straight.

Are there any influences from your childhood that motivated you to be involved in land trust conservation and now stand out? (memories people/ books etc.)

- My father, retired teacher, high school teacher and my mom was doing some work outside the home but mostly at home. We'd go camping in the summer, tour across Canada or Ontario and camp in Provincial Parks. Seeing parks, and how beautiful and wonderful they were, that was really important to me.
- End of high school, my dad was teaching in Germany. Another teacher at the school enjoyed birding and took me out birding a number of times. I learned about different habitat types, how to identify them, really connected me to the interaction between wildlife and habitat.
- Grandmother had a Ph.D. in Marine Biology, one of the first to get a Ph.D. from the University of Toronto. Got me interested in wildlife and science.

Did your education play a role in your involvement in the land trust movement?

- Land trust movement connected to initial work with Stew Hilts.
- One of the conferences I went to and spoke at in 2003 in Victoria, I connected with Sandy Tassel, American Friends of the Canadian Land Trust association. Speaking at workshops and conferences has been a great way to make a connection to my education and learn a lot back.
- Working in the provincial government and also contracts with fed/prov gov't, funded as a private academic, to conduct projects where I can learn a lot about certain things (i.e., stewardship practices). Formal education has certainly played a role, but also my informal education.
- Master of Environmental Studies at York University + Law degree. Did law in order to find new ways to protect natural resources. All traditional law courses, weren't a lot of courses that applied to my work. Did a paper in law school on ecological reserves, led to me working with Ontario Parks on parks legislation and those types of things.
- Science side and legal side of education have been carried on throughout my career.

Who do you see as promising young leaders in this movement?

- Identifying particular individuals, when I go to OLTA gatherings I see young, keen folks involved at other land trusts, quite encouraging.

What advice would you give to the younger generation interested in joining the land trust movement?

- I think it's good to have some technical depth in one area, but to continue to look for those conferences, experiences, and training that broaden your experience. Depth of skills and breadth of experience, at least for me, has worked well, and I have seen it in others. When hiring at the land trust and other places, I saw an application from Fleming College and Trent University, if I saw a candidate who had both a college diploma and a degree, and/or personal engagement within the field, I would see that they are really broadening and diversifying their skills.
- Engaging with older people in the movement, and even volunteering - expanding personal network, observing things that are going on.

What are ways people can get involved in the movement?

- One thing I like about the land trust movement is that I think there's a home there for people from any sector or background. Land trusts, at their best, can draw on a large range of skills including technology, human relations, and more are very much at home in a land trust.
- Home for anyone from any sector and background, land trusts draw on a diversity of skills, younger people bringing different skills/energy.

What is the biggest challenge in managing land owned by your organization?

- Financial. Establishing endowment program funds to maintain stewardship of the land
- Invasive species is going to become a problem for land trusts, it is changing our ecology, species composition, even our liability. Looking at ash trees, beech trees, they can decline very quickly and fall on trails. When do we harvest these trees when they are diseased and ready to fall? Also DSV is an issue.
- Climate change - not something that can necessarily be really managed by the organization, big challenge for the whole human population. flooding, erosion, droughts
- Unauthorized access to land trust properties, specifically by motorized vehicles such as ATVs. Those kinds of activities in the wrong place can really have a negative impact, damage and disturbance, community relations.
- Community relationships can be challenging for an organisation

What method of land securement has led to the most success within your organization?

- Thinking of my organization, KLT, a life lease, where somebody donates land and retains the right to live there until they pass away or move from the property. When

they make that donation, the land trust owns that property. KLT has done that twice. That is something that is attractive to some landowners. Kawartha Land Trust pioneered that movement, it can work for some landowners in the right circumstances.

What has been your career path (positions in public, private, or NGO) to date?

- Finished school, went into MNR, worked there for 5 yrs. on public policy around stewardship and stuff.
- Qualified as lawyer, left MNR and went into private practice - still practice today.
- Worked at the land trust, worked for other NGO's, had contracts with gov'ts, have taught at Trent University in Environmental Law for the past 15 years.
- Weaving among these creates connections and diversity in your career.
- NGO's are most effective in pushing forward. Governments can at critical moments make large leaps or modest leaps that make a difference on the ground, often pushed by NGOs and supported by private professionals.

And in what ways would you say that your path has been helpful to you to date?

- Goal is to protect natural areas, fulfil individual goals
- Land securement allows us to complete something positive in a win-win situation
- A delight to connect with landowners and understand why they value their property and find ways to protect what they love
- Long term, constructive, and positive
- Fulfill yourself in the environmental movement

What is your future career path (positions in public, private, or NGO)?

- Currently in mid-1950's, suspect that in the not-so-distant future I will retire from law practice, do expect to continue in the land trust movement in different ways.
- Involved in indigenous land trust work.
- More opportunities for First Nations to pick up and run with that.
- Less formal work environment in a few years works, expect to continue working in the land conservation movement, in different ways.
- Been accepted to speak at a conference about returning land, can open up some new channels and depth of connection building that the path can lead to.

Notes about interview questions:

- Conservation is a broad term to use, broad movement can include parks, land stewardship, boy scouts, etc. As Ian reread the questions, maybe this term can be replaced with "land trust conservation".
- Although people who have been interviewed have a lot of diverse experience, so maybe start broad and then zero in on land trust securement.
- using "your organisation" hints that some individuals are involved in an organization or only one, maybe have people identify some organisations and speak on their personal experience.

- Questions at different points are dealing with personal or professional development, some of it's about the movement, and some are about questions around securement, maybe consider re-clustering questions or keep it mixed up a bit.
- Both approaches are good.
- Ian talked about policy, the rest should discuss history, maybe include some more pointed questions.
- Suggested questions: What are some of the other milestones (periods, eras, etc) in the development of land securement in Ontario.
- In part elaboration of what is there, maybe tweak the order of a few to initiate different perspectives/ clearer framework, resources that are part of the project.
- Even if it isn't in the scope of the project, include recommendations for future research would move the project and broader concept forward.

3.2.2 Chris Baines Interview

(Interview date: August 5th, 2022 by interviewer: Brianna Pitt)



When did you first get involved with the land trust movement? (When did you first become interested in preserving natural lands/ becoming a part of the land trust movement? Why?)

This all started for me because of my relationship to Georgian Bay, which is where my cottage is. I'm a fourth generation on Georgian Bay and I had been Chair of the Georgian Bay Association, which is the umbrella group of some 25 cottage associations up and down the Eastern Shore of Georgian Bay. That work morphed into joining - along with five others - the first board of directors in 1991 of

the Georgian Bay Land Trust. As time went on there was a growing consensus that the exponentially increasing number of land trusts needed some organization to grow the movement. The Federation of Ontario Naturalists (FON) stepped and housed the new Ontario Nature Trust Alliance (ONTA) as a committee of their group. In time, this would evolve to OLTA.

Why/how did you get involved in the movement?

- Having worked in other organizations and having worked with my land trust from the start I have experienced most of the things that new land trusts will be going through so I was pleased to help this pass knowledge along.

What was really a game changer as far as engagement though was attending our Fall Gatherings and the Land Trust Alliance's Rallies?

- I would highly recommend to any and all involved - or who wish to get involved - to

attend these events. It is inspiring and invigorating to be with your colleagues dealing with all aspects of the industry.

What changes in policy (in your opinion) have had the greatest impact on the land trust movement (either negatively or positively)?

- CLTIP Program revived – finally! Mike Harris did many things to Ontario, and one of them was Lands for Life, which is probably his best accomplishment. However, his government did bring in a great initiative titled the Conservation Lands Trust Incentive Program. However, three months after it was supposedly passed, they suspended it, boom. Under this program, land trusts which had all been continually paying realty taxes to their municipalities on land that neither wanted nor required any of their essential services whatsoever, would now have their realty taxes exempted. Unfortunately, the municipalities (it was rumoured) leaned heavily on the Ministry of Revenue to suspend this program and that's what the government did.
- Ian Attridge, others and I myself went to see Jim Flaherty (a Progressive Conservative cabinet minister) in his constituency office in Whitby and said "Thickson's Woods is just down the road here from you Mr. Flaherty in your very riding and they continue to pay realty taxes when that money could be going to save more land." But the government had lots of reasons why they couldn't/wouldn't change that. Long story short, the Liberals came into government, under McGuinty with Greg Sorbara as the Treasurer at the time, and we arranged through our networks to place former Premier Bill Davis and his son Neil (a lawyer and a Georgian Bay Land Trust director) in a face-to-face meeting with Mr. Sorbara at Queen's Park. Understand that OLTA had been pitching under the Ministry's annual budget consultations to reactivate the Conservation Lands Tax Incentive Program. Never got anywhere with the Ministry of Finance minions. But Greg Sorbara, the Liberal Treasurer, was delighted to receive the Davis's and hear their pitch.
- After hearing the business case for CLTIP (the same one we had been making for seven years) Sorbara turned to a staff member and said, "So how much will this cost us annually to implement this?" "About \$200,000" ... "This is great, we'll do it! Thank you for bringing this to my attention, Mr. Premier." That was a lesson for all of us to say, you want to get things done, you've got to get the right people with the right people at the right time.

American donors federal tax exemption helps Ontario's land trusts

The other part that we (collectively again) got accomplished is the recognition of the gifts from American landowners donating land to Canada. Up until this point American cottage owners or landowners who had environmentally significant land and they wanted to donate to a Canadian land trust would not get a tax receipt that they could use in their country. Since many Ontario land trusts have up to 30% of their areas being owned by Americans this was an imperative for us to increase donations of money and land.

Never close a door in life because Jim Flaherty – now the federal Finance Minister was again our target. I was a board member of American Friends of Canadian Land Trusts, which is an American 501c3 registered charity in the US. We needed reciprocal federal legislation in

Canada to do make this happen. It's complex and for tax lawyers on both sides of the border to fully understand but it's vital for us. Bonnie Sutherland (ED of the Nova Scotia Nature Trust) lead the charge and we did a full court press of federal members. This effort was rewarded when Jim Flaherty made the official announcement at Thicksen Woods Land Trust of this new reciprocal tax measure just as the OLTA Fall Gathering was about to start. It was a wonderful day.

Put those together and it's tangible proof of where OLTA has helped really change things for the donors. Money wasn't going to pay realty taxes in the first place. And then secondly, we were now able to engage American donors who own land in Canada and want to give either the land or cash to Canadian land trusts

In your opinion, what is the most effective method for land securement?

- Relationships with the owners. And by that, I mean the entire family, not just the parents. You have to work on a multi-level strategy of generational engagements. We've lost deals where the kids go, "excuse me, you're doing what?" The parents must be proactive and up front regarding their motivations. So keep your ears open as you'll have to be a good salesperson. Listen to hear if people are quiet. It is the concept of legacy and stewardship that must appeal to all the generations for the deal to be successful.

What has been your most fulfilling experience working in land conservation?

- It is without a doubt the site tours. To look at land wherever it is, and we did a lot of tours in Monterey, California, the Big Sur. Americans are amazing. When we were down there, Clint Eastwood had donated \$200 million dollars U.S. of land to the Monterey Land Trust. Here in Ontario, we had the Lieutenant Governor (Hillary Weston) and her husband dedicate an island, we just received in Georgian Bay. And at FON we did a lot of tours of their properties. I think, it's just so inspiring to walk property. I was out in Mayne Island in British Columbia on the east coast of Vancouver Island were the property that an American had donated to the Mayne Land Trust. In Nova Scotia I toured an amazing NCC property. It doesn't matter where you go, it's so inspiring to see any protected property anywhere.
- And on that point, I remember pitching, for the Georgian Bay Land Trust a foundation that shall remain nameless about trying to buy this island that at one point had a fishing shack on it. I included in the pitch that "rumor had" it (and indeed rumor did have it) that it was a fishing family, a rough, gruff, old fishing family that had seen many bad things in their life that had deserted the shack with a hot meal on their dinner plates because there was a "ghost that scared the hell out them." It was some time later and I hadn't heard back from this particular foundation. I phoned them up and said, "You know, we made a pitch for blah, blah, blah, blah." And the guy said, "I don't really remember it." and then he said, "Oh, the one with the ghost on it." And I said, "Yeah". And he said, "Oh, we approved that for \$60,000."

What direction would you like to see the movement go in? (In what ways would you like to see the land trust movement evolve going forward?)

- As far as OLTA and Ontario, the necessary movement towards inclusiveness, equity and diversity is critical for our success going forward. It's time to get ahead of the curve and develop programs that bring in more leaders and members who reflect the Ontario of the 2020's and beyond. Cherry pick all the best programs that each of the provincial land organizations have and adopt them to our situation.
- Take every MPP in Ontario out and show them some local land trust properties in their ridings. This will give them a much better grounding on what we do when we come back and ask for money or particular legislation.

What steps do you feel still need to be taken to ensure conservation success?

- At the same time, municipal councillors also need some attention. Too many don't look kindly to the land trusts because they fear the loss of assessment. Walking the land and hearing directly from their own voters about the many benefits can only increase their knowledge and opinion of the role that land trust play.

What changes would you make, if any? (be it to policy, legislation or the movement in general)

- 1) Capital Gains exemption increase - I would increase the capital gains write-off for the donation of environmentally significant land. This is a federal issue and speaks to the continued need for our national land trust organization.
- 2) MPAC relationship - The opportunity to develop a better working relationship with MPAC (who always seems like the Sphinx by just smiling back and not saying anything).

What has been the biggest challenge(s) you've faced personally or as part of an organization, pertaining to land securement?

- Getting the attention and buy-in of the silent majority (public and politicians) of what it is we do and how we do it. It may take several more generations before "land trust" becomes a top-of mind concept for families doing their estate planning and for municipal councils to see us as an ally to appropriate and desired green space planning.

What advice would you give to the younger generation interested in joining the land trust movement?

- Get involved. Start with your local land trust. Come out to events and just start at little things and work up. It's hard not to get engaged in this particularly when you find that there's a special property that is under threat where you live and recreate. We always need more volunteers now.

What are ways people can get involved in the movement?

- Contact the local land trust in their area or OLTA itself and say, “I have these skills and I want to help.” This movement needs just about all skills out there to help us grow exponentially. From accounting, geo caching, biologists, media experts, bakers, entertainers – there’s room at the table for everyone of every community.

What is the biggest challenge in managing land owned by your organization?

- Each property presents different challenges for each land trust. We had some where ATV’ers were chewing up the trails and it required some fake solar powered cameras that, for a while, changed their behavior to be more respectful. That didn’t last long though as the ruse was eventually discovered. As we did not have enough boots on the ground this became an issue in the short term, but we learned. Other properties required fencing off large parts during bird nesting season and prohibiting dogs and people from encroaching on the area. Stewards are really the unsung heroes of land trusts and are tangible proof to potential donors that we take their gifts seriously both now and in the future. People are watching and do notice.

What method of land securement has led to the most success within your organization?

- Depends on when you ask the question. Started off with free hold land donations and then has evolved to more and more easements as our donor base gets more educated and sophisticated. The trends continue to flip back and forth here and in the States.

What do you remember about the early days of OLTA, or what was known as Ontario Nature Trust Alliance (ONTA) before 2002, and what role (if any) did you play in OLTA’s work over the years?

- I was hired by the FON (Ontario Nature now) for a about 1 ½ years in the late 90’s to grow and promote the Ontario Nature Trust Assistance Program (ONTAP) . I would go around Ontario trying to give out money to naturalists, enviro organizations, birdwatchers, etc. - all sorts of groups like that who we thought could benefit from this. These funds were specifically to preserve habitat. They were hard nuts to crack. They really didn't want any money for land securement. Their focus was the birds or nature – not land. I kept saying that we all love the birds, but we need to preserve the habitat where those trees are. It was a challenge. Kudos to Ontario Nature for being so far sighted to say that the time had come, (they had done the same for starting of NCC in the 60’ s) and we needed more local land trusts to achieve everyone’s goal of saving more nature.
- In later years I was both a director and Chair of OLTA and enjoyed the experience immensely. Fun fact but Wally King was the one who insisted on the term “Governor” for board members and it has stuck ever since. His hat was frequently a live auction

item with Paul Petersen once paying \$500 (to OLTA) for the privilege of buying it. Great days. Great memories.

Do you have any insight into what OLTA's/ONTA's role has been in the land conservation movement in the past 20+ years?

- It did exactly what it was supposed to do and I think the results speak for themselves today. The Conservation Lands Tax Incentive Program was rescued with persistence and focus. And with a pan-Canadian effort the federal reciprocal tax legislation for American donors was passed. These are just two of the initiatives that tangibly improved the operations of Ontario's land trusts.

3.2.3. Kim Gavine Interview

(Interview date: August 5th, 2022 by Interviewer: Brianna Pitt)



When did you first get involved with the land trust movement? (When did you first become interested in preserving natural lands/ becoming a part of the land trust movement? Why?)

I got involved in the land trust movement in 1989, right after graduating from Brock University. My first job was as an environmentalist with the Federation of Ontario Naturalists. They were one of the organizations that was part of the Ontario Nature Trust Alliance, which is now OLTA. In the early nineties, Stew Hilts and Ron Reid were writing a book called Creative Conservation, which I had the privilege of supporting them in delivery of this project. As most people know, Stew and Ron are the founding fathers of the land trust movement in Ontario. So, it was a real privilege to be able to help put that book together at the Federation of Ontario Naturalists with those two authors and get it delivered. I then went on to work with the Ontario Heritage Foundation, where I was directly responsible for administering land securement dollars to acquire land both in the Carolinian Zone and on the Niagara Escarpment. At the time, we were still using Islands of Green as a document to help prioritize properties for protection. And at that time the Natural Heritage League was the guiding group behind land protection, and the coordinator worked at the Ontario Heritage Foundation. So right out of university, I got involved in the land trust movement and loved it right from the get-go.

Why/how did you get involved in the movement?

I naturally fell into the land trust movement through my jobs. I worked with both the Federation of Ontario Naturalists and the Ontario Heritage Foundation twice each. And my second time I worked for the Ontario Heritage Foundation I was directly responsible for land acquisition and conservation easements. We were working with landowners through the *Ontario Heritage Act*. We were able to do conservation easements, one of the first groups

able to do that, and we were working closely with other land trusts and conservation authorities and helping them with land acquisition. We were acquiring properties directly and I just got directly involved in the land trust movement. I also sat on the board of directors for the Couchiching Conservancy and did some work for the Ontario Land Trust Alliance and for Couchiching Conservancy... things like baseline studies and volunteer monitoring training. I also did some training for the Ontario Nature Trust Alliance on conservation easements. I was very much involved in land securement and stewardship in the 90s.

What changes in policy (in your opinion) have had the greatest impact on the land trust movement (either negatively or positively)?

I think one of the best benefits that we saw was the introduction of Ecogifts. When I was at the Ontario Heritage Foundation, I had the opportunity of closing one of the very first properties in Ontario, where it was recognized by the Federal Government as an Ecogift. It provided the opportunity for land owners to see an economic tax benefit by donating their land. So, there was obviously the personal satisfaction for landowners, but now there was also the economic incentive to donate land as well. So, I think that had a huge impact on securing properties in Ontario. There were also land protection policies like the *Niagara Escarpment Act* and the Oak Ridges Moraine Conservation Plan, which saw legislative tools to protect property. But they also came with dollars. The government decided to provide dollars and those dollars were used to help acquire properties both in the Niagara Escarpment and on the Oak Ridges Moraine. Again, I was directly responsible for administering about \$15 million dollars under the Oak Ridges Moraine Foundation. Not all funding was for land securement, but there was a significant amount of money that did go into land securement on the Oak Ridges Moraine.

In your opinion, what is the most effective method for land securement?

So there's no question that outright donation with funding to manage the lands is probably the easiest method of land securement for land trusts, but it doesn't necessarily mean it's the most effective. I think whatever method is used that's going to ensure that the landowners are willing to proceed is the most effective method... be it donation, acquisition, easement, split-receipt, etc. But again, there's costs associated with all these types of land securement options. And again, I don't think there's one that beats the other one out. It's whatever is going to ensure that that parcel of land is protected.

What has been your most fulfilling experience working in land conservation?

My most fulfilling experience working in land conservation was always walking on a property with the landowner. Having that landowner share the love of their land, why they want to see it protected in perpetuity and actions that they did on the land (e.g. tree planting). In some instances, it was land that had been passed along generation to generation, and we were dealing with the grandchildren who had been there playing as kids. And now they wanted to see it protected in perpetuity. So, it was amazing to see so many phenomenal people. And I got to meet some really interesting people. I got to meet Mrs.

Hilda Pangman, daughter of Colonel Sam McLaughlin, who started General Motors. I also got the opportunity to meet the McMichaels of the McMichael Art Gallery. I also got the opportunity to meet Doris McCarthy who was a famous landscape artist. She was a very philanthropic individual who donated land on the Scarborough bluffs known as Fool's Paradise to the Ontario Heritage Trust. It was definitely about people. I also got involved in the acquisition of some very interesting and unique parcels of land such as "The Cheltenham Badlands" in Mississauga. It's very satisfying to look at that property and know that I was a small part of ensuring it was protected in perpetuity.

What direction would you like to see the movement go in? (In what ways would you like to see the land trust movement evolve going forward?)

I actually think that the land trust movement in Ontario has seen significant growth since I started in the nineties until now. I think they've done a really good job at coming together as land trusts, sharing ideas, sharing methodologies with each other and supporting each other. I think continuing to do that is really, important. I'm not sure that there's anything wrong with the land trust movement that needs to be fixed at this point. I would, however, like to see more government funding, be it federal, provincial, or municipal, to help support the land trusts who are out raising funds from private individuals, foundations, private corporations, etc to commit to securing critical lands across Ontario. We haven't seen significant funding in a long time for land securement. While we've seen some, I'd always like to see more!

What steps do you feel still need to be taken to ensure conservation success?

I think dedication by all levels of government working alongside land trusts to ensure that these special and critical lands are protected in perpetuity.

What has been the biggest challenge(s) you've faced personally or as part of an organization, pertaining to land securement?

It's probably easier today, but back when I was doing land securement, one of the most difficult things to do was to get management dollars. So, you would approach a landowner and they'd say, "Well, isn't it enough that I'm giving you my land?" And it was difficult to try and raise management dollars. I think that this is an area where land trusts have made improvements. They recognize that it cost money to manage properties and therefore you must ensure that you have some sort of pot of money, be it an endowment, be it management dollars set aside for that property to manage it in perpetuity. It's not appropriate to be taking property if you can't manage it effectively.

What advice would you give to the younger generation interested in joining the land trust movement?

Go for it. One of my most rewarding things to do is to drive or walk by a piece of property and to say to myself "I was involved in helping to secure that property." I gave you the example of the Cheltenham Badlands. I was involved in that acquisition and it's amazing when you see it in publications and when you drive by it. Sometimes you drive by a piece of

property that you might have worked on 30 years ago that at the time was an open field and now it's a beautiful forest. It's a really, really rewarding career to get involved in. The earlier part of my career was land securement and stewardship. The latter part was more legislation and regulation involving politics and government relations. While you see progress in those areas as well, it's not the same as being able to drive by a property and say "I helped protect that!". It's property....it's tangible....it's touchable....it's real.

What are ways people can get involved in the movement?

They can volunteer on a board. They can volunteer to help prepare baseline studies, they can volunteer to help manage and monitor properties. I know that when I was at the Couchiching Conservancy, we did volunteer days where we brought volunteers out and did "baseline 101. I think there's a lot of different opportunities for volunteers to get involved with the land trust movement.

What is the biggest challenge in managing land owned by your organization?

It's the long-term management of lands in perpetuity.

What do you remember about the early days of OLTA, or what was known as Ontario Nature Trust Alliance (ONTA) before 2002, and what role (if any) did you play in OLTA's work over the years?

Well, I think the biggest thing were the annual gatherings. They were phenomenal! Some may remember the Opinicon Lodge which included great day sessions and lots of guitar and sing-alongs in the evening. There was one year where we changed the lyrics of YMCA to ONTA. It just gave an opportunity for those land trusts to all come together, either those who had been doing it for a long time and sharing their experiences with new and up and coming land trusts, getting to know each other, sometimes doing fundraising together, sometimes sharing solicitors. We were like a large land securement family. I had the privilege of being someone who was learning at the beginning and then someone who was sharing and educating in later years. I gave several sessions at the annual gatherings. I just think it was a great opportunity to share stories among the land trust. It's a group I miss dearly.

Do you have any insight into what OLTA's/ONTA's role has been in the land conservation movement in the past 20+ years?

Bringing the land trusts together, sharing the challenges, the opportunities and sometimes just sharing stories. I think that has been one of the critical roles for ONTA...now OLTA. Pushing for regulatory and legislative changes that's needed to support land trusts. Advocating to the government for funding. Advocating for legal changes. Much of the work that Ian Attridge and Paul Peterson did, had a huge impact on the work of land trusts.

3.2.4 Barb Heidenreich Biography and some Reminiscences



Barb Heidenreich's Bio from the OLTA

website (<https://olta.ca/who-we-are/board-of-governors/>): "Trained in the fields of economic development, ecology, business, international policy, planning and conservation (York U_B.A, Geography; McMaster U_M.A. Economic Geography; Columbia U_M.I.A. International Business). In the 1970s Barb worked for the private sector (in Latin America) as an investment analyst and then Manager of Project Planning, Region of Durham. Barb also has extensive experience in management and

fundraising in the not-for-profit sector. She volunteered on the Otonabee Region Conservation Authority (1971-1981), was ED of the Canadian Institute for Environmental Law and Policy, on the Board of the Canadian Environmental Law Assn. and one of the founding members and first President of the Kawartha Land Trust (2001-2004). Barb worked as Senior Policy Advisor (1983-1986) with the federal government (DIAND) on the division of the Northwest Territories, monitoring the community debates and assisting in developing constitutional options for Nunavut and the NWT. She was also involved in furthering the Land Claims of the Labrador Inuit (1981-1982). On the Ontario Municipal Board (1991-1997), Barb served as Tribunal Judge over an appellate court addressing (land use) appeals under the *Planning Act*, the *Assessment Act* and *Expropriations Act*. Education and mentoring have always been a part of Barb's career preferences and she was an Associate Professor at Trent University (Indigenous Studies; Environmental Studies) and Associate Professor, Boston University in her position of Centre Director for the School for Field Studies in Bamfield, B.C. Natural Heritage Coordinator with the Ontario Heritage Trust from 2003, Barb retired in 2016, but continues to mentor Fleming College "Credit for Product" students. A 2019-2020 highlight was completing the protection of her Fern Hill Farm (200 acres in South Monaghan) and her great grandfather's Innisfree Farm (100 acres in Innisfil Twp) by CEAs held by the Oak Ridges Moraine Land Trust. Barb's Order in Council appointments in Ontario include: the 1990-1991 Chair of the Task Force on Manufacturing of the Ontario Round Table on Environment and Economy; Board of Directors of Ontario Hydro (1991); Member of the Ontario Municipal Board (1991-1997)."

You say you don't need to be interviewed, but you were around working in the field 20 years ago...

Having had the wonderful experience of reading all the responses by Ron, Frank, Ian, Paul et al in advance ... *which are so wonderful!!!* I can add nothing more. What I am able to contribute is an interesting family example of a conservation land trust dating back to 1889. My great grandfather, Sir Byron Edmund Walker, purchased 500 acres and almost a mile of lakefront on Cook's Bay (Lake Simcoe), 45 miles north of downtown Toronto in 1889. He left

it to his descendants as a private not-for-profit company, Innisfree Limited, with his family members as sole share holders. Innisfree Ltd. owns the land although families are allocated responsibility for the waterfront based on the number of shares they hold and they own their cottages. We all grew up there, barefoot, canoeists and sailors, spending our summers outdoors. Getting 100% of family member shareholders to agree to sell or develop this land would be impossible. So, the land still remains intact nine generations later ... an old growth Oak forest under MFTIP, a Red Oak Savanna recognised as an ANSI and maintained in partnership with MNR with periodic burns, an Indigenous burial ground maintained with the assistance of the Mississauga First Nation. Very little has changed over the years and the family is obsessed with nature and documenting species. In 1954 my grandfather, an entomologist, wrote that the climate was warming as the variety of insects that he had studied for 60 years at Innisfree was clearly changing.

I joined the land trust community full time in 2001 when I was contracted by Evergreen to study the feasibility of urban not-for-profit conservation land trusts (see Literature review). Joining the Ontario Heritage Trust as their Natural Heritage Coordinator in 2003, propelled me into a community of like-minded souls who restored my faith in humanity as they were as focussed as I was on our joint passion... protecting nature. Highlights for me always included the OLTA Gatherings and mentoring emerging land trust staff, Fleming and University of Toronto students. Speaking of universities.... want a Ph.D. in land trusts? Then regularly attend the mind-blowing Land Trust Alliance Rally!!

3.2.5 Bryan Howard Biography and Interview



Bryan was born in November 1945 and was blessed to spend his first 19 years growing up in rural Southwestern Ontario. In May of 1965, he was hired by Arthur Latornell as an Assistant Field Officer, in the Conservation Authorities Branch (Department of Energy & Resources Management). During the next 20 years, he served in the Conservation Authority program, either as an Assistant Field Officer/ Assistant Resources Manager/ Resources Manager or General Manager at the following locations in Southern Ontario:

1965 – Niagara Peninsula Conservation Authority (C.A.)

1966 – Otonabee Region C.A. & Crowe Valley C.A.

1967 – Kettle Creek CA / Catfish Creek CA/Otter Creek / CA Lower Thames Valley CA

1968 – Otonabee Region CA & Crowe Valley CA

1969-1970 – Ausable River Conservation Authority

1972 – Upper Thames River Conservation Authority

N.B. in 1973 the Conservation Authorities Branch was transferred to the new Ministry of Natural Resources (MNR), as part of a major government reorganization.

1973-1974 – Long Point Region Conservation Authority

1974-1975 – Niagara Escarpment Commission

1975-1976 – Central Lake Ontario Conservation Authority

1976-1980 – Essex Region Conservation Authority

1980-1985 – Maitland Valley Conservation Authority

Bryan then worked for the province in the Natural Heritage League and spent about 10 years helping to build the Trans Canada Trail in Southern Ontario. He is a big supporter of the Bruce Trail and his current hobby is managing woodlots on the Bruce Peninsula with his wife, where he's been going for about 50 years.

When did you first get involved with the land trust movement? (When did you first become interested in preserving natural lands or becoming a part of the land trust movement? Why? Year?)

- I was hired at the young age of 19 many decades ago to be an Assistant Field Officer with the Conservation Authorities branch - after first year at Western as a geography student from 1965-1969 to assist full time resource manager, then as an assistant at Niagara Region CA.
- From 1965 - 1969 during the summer I worked as a Field Officer/Resources Manager with the Province of Ontario to assist the full time Resources Manager who was a civil servant assigned to work with the conservation authorities.
- In 1966 assigned to create the map for the Otonabee CA and the NCC working together. Preservation of the Cavan bog outside of Peterborough, acquired by ORCA, using grants from the NCC to make up the 50% that local municipalities would have to pay otherwise.
- I was asked to do very first map for Otonabee nature conservation and NCC (which at the time was one man operation). It was the first project NCC did in Ontario was preservation of Cavan bog, land was being acquired by Otonabee region using grants from NCC. Involved in land acquisition, but didn't really get summer students involved
- Charles Sauriol - I worked with him, he funneled money into the conservation authority to match the provincial donation.
- Green Footsteps, last book he wrote before he passed away - atypical for a bureaucrat, would travel Ontario by bus, we'd have meetings with the Ivy Foundation, look at the property, go back and write his proposal - he was a salesman basically, he was selling conservation to the rich.
- Involved in land acquisition, a little bit of that, they didn't let the summer assistants get to involved because it typically took a year.
- Arthur Latornell - re-hired by him every year.

What changes in policy (in your opinion) have had the greatest impact on the land trust movement (either negatively or positively)?

- My notes discuss about new directions in the 1970s. The MNR had been created as a super ministry in 1973, they hired a whole group of planners and field offices and set up a lot of great scientific inventory work, culminated in identifying areas of natural and scientific research to represent every nook and cranny of Ontario.

- Original goal was to acquire all this land, then realized there were constraints, inflation was very very high, so they had to figure out a new way to get the job done.
- We discovered the Ontario Heritage Foundation, the fact they were taking easements and protecting heritage sites, decided to apply this to natural heritage.
- Looking at new ways to protect natural heritage in light of the fiscal constraints, how the heck will we get the job done. They wanted to advocate a new approach to natural heritage protection (statement from 1980).
- Discovered OHF, MNR was setting itself up to develop partnerships for the very first time.
- That would be the pivotal moment, around 1980, when MNR and conservation authorities in charge of protecting all this stuff, realized we'd have to create all kinds of creative mechanisms, easements.
- Land trusts weren't even on the horizon at this point.
- Developing partnerships for the first time- pivotal moment around 1980 when conservation authorities and MNRF realized they were going to have to be creative, land trusts were not on the horizon, looking more at easements.
- Change in governmental mindset, specifically MNR, ultimately led to land trusts, what it was leading to was different way to protect land.

In your opinion, what is the most effective method for land securement (for landowner AND land trust organization)?

- When NHL was getting going, Dr. Stew Hilts developed a hierarchy of protection - think of a simple period, at the top, simple acquisition, at the very bottom is land owner contact - we use those kind of programs on Carolinian Canada and later on Niagara Escarpment - teams of students trained and dispatched by Stew to talk to landowners about the nature of their property - educate landowner - when they are educated, try to convince them that we would like you to do a handshake agreement, nothing legal about it, but you approach the land owner and get a voluntary commitment.
- Land owner contact became the preferred method of securing the land in a very insecure way, developed an award program, most landowners were honoured to win a Carolinian Canada Protection Award.
- Students would educate landowners about natural heritage feature on site, lower end was handshake agreement, voluntary commitment for Carolinian Canada. Securing the land in an unsecure way, so they developed an award program.
- A better way is some kind of an easement - Frank has updated me in EcoGift program and the easements being used today.
- Stew Hilts says you may start with handshake agreement and voluntary protection, but as they get older and you continue working with them, they may donate the land at the end of their time.
- Work your way up in pyramidal hierarchy, work from the bottom from the top, involves easements, ownership, etc.

- Simple ownership by some kind of protection organization - expensive and often hard to achieve
- Easements have been refined tremendously in the last 30 years.
- If you donate an easement, you get a pretty good tax receipt and you still keep the land - good incentive.
- For a landowner, probably an easement, if they're a conservation minded person initially, and for the land trust organization I think that's a good tool to have.

What has been your most fulfilling experience working in land trust conservation?

a. More specifically, land securement?

- In my days in conservation, we had foundations at most of the conservation authorities also so worked with landowners to make a donation through the Conservation Foundation which was charitable - those were always good, did many of those.
- OHF: it was very exciting in the creativity that was involved with everybody working together. I remember one day a fellow was working with told him there's a man here who wants to donate \$100 000. Broke up into small chunks, sent money out to some of the CA's that were (80's) trying to acquire land, very special properties.
- All the things achieved in the Natural Heritage the Carolinian Canada Memorandum, which protected 30 sites.
- *Conservation Land Act*, originally called untaxing nature, continues to be a big achievement that we achieved in those years at the NHL.

How have you seen the land trust movement evolve over time? (i.e securement methods, formation of land trusts, etc.)

b. What are some other milestones (periods/ eras) that you've seen emerge within the land trust movement?

- didn't even know about land trusts - Ron Reid was a colleague, worked in conservation authorities a bit, close friend as well - done a lot of work for the Federation of Ontario Naturalists (FON).
- Ron Reid, Stew Hilts, and Mac Kirk wrote a book called Islands of Green - I was looking carefully after our interviewers contacted him, there was no mention of land trusts in the book.
- Wasn't until 1987 that Ron actually was doing some work as a member of the Natural Heritage League coordinating committee on easements, that somehow got him into contact with land trusts in the States - he came back to a committee meeting and was very enthusiastic about land trusts.
- Lynn MacMillan- a legendary lady who was very responsible for working on the Niagara Escarpment, very determined, grandfather was David Lloyd George - very involved with the FON (now Ontario Nature) member of the coordinating committee.
- Said to Ron at that meeting that she'd like to donate 3 million dollars to the FON to hire Ron to write a report on land trusts. It was released in 1988 – (see Literature review) written for the Federation of Ontario Naturalists (FON) (now Ontario Nature).

- It was his report really that let the genie out of the bottle on land trusts in Ontario, we would've wound up with land trusts anyhow but it was the initiative taken by Ron Reid and the committee that got it going.
- Stew, Ian, Ron, and many others worked together with the FON to create the Nature Trust Alliance, according to Frank in November of 1997 the Ontario Nature Trust Alliance was born and became official 10 years after report was written.
- A few land trusts had been formed - Ron himself lived in Orillia and they formed the Couchiching Conservancy - Ron kept his finger in at the local and provincial level moving the agenda within the FON.
- At the provincial level, that has been the evolution.
- Frank did say that some land trusts really only believe in fee simple acquisition, brings along the burden of management.
- Some land trusts only believe in fee simple acquisition brings along the burden of management. Formation of land trusts has been amazing, many authorities part of OLTA. There are about 35 in Ontario now.
- The organization now that is the umbrella for land trusts was formed in 2002.
- Took close to 15 years to actually instill this in a provincial organization.
- When they decided to go with the Ontario Heritage Foundation, they were interested because of the trust function of the OHF - they were able to take ironclad easements which they'd used on buildings till this point - using the OHF as a province wide recipient of these easements - found it was better at the local level.
- Working from the bottom up with a little bit of direction from the top down is the way to go.
- Ironclad easements: OHF (now OHT) was best suited to expand the use of easements to preserve natural areas, under the authority of the *Ontario Heritage Act* - under the authority of a provincial statute. OHF easement could be enforced against the owner or future owner.

What direction would you like to see the movement go in? (In what ways would you like to see the land trust movement evolve going forward?)

- One of the states that Ron put us in touch with and I went to with Ron - Vermont. Vermont is a very small state compared to the province of Ontario. Vermont has about 500,000 people tops and it's mostly small towns and villages. They have a state land trust there called the Vermont Land Trust which was just an amazing organization and they were mandated by their state government to do work all over the state, maybe they had local committees or something but it was one organization, kind of like the Ontario Heritage Foundation (now the Ontario Heritage Trust).
- That might have been in people's minds originally but I don't think that's very practical for Ontario.
- So, I think having a strong governing body would set standards and Frank sort of schooled me on what they (OLTA) are doing I that regard. The OLTA as a, let's call it a *mother ship*, where to all the land trusts is a very important thing so that they are all working to the same song sheet and the same standards.

- I think that having provincial organizational standards, and I think that's what OLTA is working hard to achieve by adapting the standards from the United States. In the U.S. they have the American U.S Land Trust Alliance which is an amazing, powerful organization to all of the local land trust in the U.S. Obviously some of our rules and criteria are different here in Canada so we need to adapt what they have in place there to a Canadian situation.
- There are standards for how these organizations should operate, if say they're asking people for donations and expecting tax receipts, they have to be operating at a certain standard acceptable to the government of Canada.
- I didn't ask Frank whether there is any ministry of the government that's actually lending a helping hand with this. It would be ideal if the government would be able to do that.
- The big thing with government, in my experience, is that government has morphed from the do-ers, top-down delivery, and we're now expecting bottom-up delivery. But the best system delivery is when the top provides some direction to the bottom so that you meet in the middle. So if the government's not doing it, you need an OLTA to provide directions to all of these far-flung land trusts because some of them are large and have well qualified people in charge and some are very small volunteer-run organizations that need a little help in terms of direction.

Who in your opinion has had a major impact on land trust conservation in Canada/Ontario?

- Ron Reid.
- Ian Attridge - working behind the scenes from the legal perspective since he was a law student.
- Stew Hilts - was a tremendous asset, has had some help in recent years, isn't as active now in the movement, played a tremendous role (wrote a book in 1993 - Creative Conservation).
- No longer with us - Malcolm Kirk - was a great crusader and protector. CA Resources Manager in the Owen Sound area - Mac was very instrumental at the FON, in creating the Nature Reserves committee. Mac was certainly a mentor to me when I was a young guy and I'd go to his place every spring and he'd tour Grey Bruce counties with me to see all the things that still need protection. One of the things he used to do, is he would go up into Bruce Peninsula, which was not within his CA jurisdiction, and he learned about the plan to subdivide Dorcas Bay and he led a campaign to raise money and that became the first FON nature reserve in 1962. FON actually sold that to Parks Canada when they took over all the lands and created the Bruce Peninsula National Park. So, they (FON) in turn used that money to protect another site. He's also one of the authors of Islands of Green.
- President & CEO of NCC John Lounds.
- Charles Sauriol & another guy that worked with him- they worked out of an office above a laundromat on the Danforth and now the NCC has hundreds of employees across Canada. They really have a good name and built up a brand that's comparable to that in the U.S., and when they started it was Charlie touring around and he was

very good at raising money but Charlie wanted to get the land protected and in the hands of the CA or another similar body.

What steps do you feel still need to be taken to ensure land trust conservation success?

- Well, I think that goes back to what I said before, is that we need strong provincial direction from the OLTA in standards, procedures, training manuals, and all of those kinds of things that citizens need if they're going to be working at the local level. Just having consistent standards, practices, procedures, and all of those things would be very important.
- I also think that it's important to have some sort of information campaign at the local level to educate citizens on the importance of what they're trying to do.
- So for example, within the Couchiching Conservancy, you have to go out and educate people at the schools, and municipal councils, etc. Things like that are very important.
- That's what we used to do in CA's, when I worked in CA's mostly in rural Ontario and I was at a council meeting just about every night of the week - selling conservation - that's what we did as Resource Managers in those days.
- It's important to sell your product, but to have a good product that you're selling is the first thing that's most important.
- We have lots of good information from what the MNR did in the late 1970's and early 80's in identifying all these areas of natural and scientific interest.
- Even various official plans ESA's and everything in them, so I think we're not short on information in Ontario, it's really the delivery methods that we have to work on - and that's what land trusts are doing.

Are there any influences from your childhood that motivated you to be involved in land conservation and now stand out? (memories/ people/ books etc.)

- I was fortunate to be born in a small town in rural Ontario I worked with my grandfather who was a farmer in Huron County, I was out there as a kid growing up in the town of Listowel, fishing in the river and building forts in the bush, I was kinda close to nature as a kid.
- My father was a high school geography department head, he worked a bit with the local CA which had its office in our hometown - I got to know the manager there and put in an application for a watershed survey they were doing - got hired by Art Latornell at 19.
- When I was first offered the job, I just kind of said "oh no, I think I'll pass, I have a good job with Ontario Highways", and Ken Muskell kept telling me that I should do it. So I finally said, "Okay Ken, I'll do it. What do I have to do?" he told me all I had to do was go to Toronto he next day to be interviewed and so I went and was interviewed! It's one of those things in life where you make a decision in 60 or 90 seconds that affects your whole life.

Did your education (formal/ informal) play a role in your involvement in the land trust movement?

- Yeah, my father was a geography teacher, so I was always big on geography and that led me to take geography/planning and history in university. That then enabled me to be hired for conservation work. If I went to school for something else, I probably wouldn't be doing this kind of work at all. There's many ways you can contribute to the land trust movement though, education may get you into your career, but I think that there are a lot of people who work in land trusts who are just naturally interested in that and it doesn't necessarily need to be their education.

What method of land securement has led to the most success within organisation(s) or agencies that you have been involved with?

- In conservation authorities from 1965-1985 getting government approvals was hard, we had to write up proposals for approval. Challenge is funding and keeping the support at the municipal level. Big part of your job to always be out and interacting with the municipal councillors. Managing land after acquisition.
- Finding new public owners, a big issue was people wanting to take ownership but they can't manage. Created community management organisations ('Friends Of' Organisation).
- Ignite and power the local community to take charge, bottom up management. Engage community.
- Conservation: fee simple acquisition or donation, not taking easements, only exception is in Islands of Green.
- Working with private owners through informal agreements like the handshake agreement. Keep contact with owner, keep working with owner to build relationship over the years, more likely to find success.

What has been your career path (positions in public, private, or NGO) to date?

- The first 20 years of my career I was hired by the province or conservation authorities to be manager.
- Then I worked for the province in the Natural Heritage League.
- While I have great affinity for NGO's, I've actually never worked for one.
- Played a role in building the Trans Canada Trail.
- My career has been in the public sector exclusively at this point.

And in what ways would you say that your path has been helpful to you to date?

- I guess I'll go back to growing up in a small town - the attitudes that you form when you grow up in a community where everyone knows everyone else, and working in rural conservation authorities - influenced my worldview.
- Allowed me to lead a discussion on whether 'the grass is still growing'. Conservation authorities are grassroots organizations, have to keep the fire at the local level, not top down.

- Any government organization now has to touch roots with the grassroots organizations to be successful.
- My work in the Bruce Peninsula was not well received at first, had to touch grassroots to be successful.

What is your future career path (positions in public, private, or NGO)?

- Woodlot Owner - my wife is a forester, my hobby is managing a couple of woodlots on the Bruce Peninsula, been going there for 50 years - one of the woodlots, my son and I have leased it out to a Mennonite farmer who is tapping for maple syrup, have to administer that.
- Those forests are managed under the Managed Forests Plan (MFTIP).
- Big supporter of the Bruce Trail, spent about 10 years building the Trans Canada Trail in Southern Ontario.
- Al Macpherson - prof at Sir Sandford - was MNR then taught at Fleming, did a lot of work on trails in that area.

Who do you see as promising young leaders in this movement? (specific individuals - this question implies).

- Because I'm not connected with the movement, I would not be able to answer that but you guys on the other side of the phone sound like you're pretty passionate young leaders. But I'm not really plugged in anymore. In my work with the rail trail certainly Laura Caterac is really involving the school kids. I think that there are so many young leaders that can be cultivated just by educating at the community level.
- Back in my very first conservation authority they had already started an outdoor education program, conservation science school like a boy scouts camp where they had kids from grade 7-8 out on a three-night stay living in wagons. Some of the kids that went to that program, one of them became a conservation authority manager.
- Art Latornell was a guy who grew up on a farm and was well educated, he became the senior guy in the conservation authority branch. He was in charge of field services. He always believed in education and was a big big proponent of educating the public especially the youth about all aspects of conservation. In those days they were talking about wetlands and soil erosion, good farming. They would have soil judging days or kids could come learn about soil.
- Ray Lowes who created Bruce trail liked to hike and his theory was the Niagara escarpment was getting carried away and he said along with Robert Bateman and professor Pearson at Guelph, said we have to build a trail on the escarpment so people will get out and experience it. People who use them protect them with a passion. same people who use them will be the people protecting.
- One of the books that really inspired was a book called Green Ways for America by Charles White, about how communities across the USA are making green trails. In my experience the Americans are decades ahead of us in getting free enterprise and public involvement. Their government is more willing to partner with local people.

- The government need to play an active role and have policies that encourage and facilitate the work of a land trust.

What advice would you give to the younger generation interested in joining the land trust movement?

- I think that giving advice to young people is hard to do. Advice I would give is to engage young people through outdoor education programs and school education on the importance of the environment and its components. Get out there and get them involved as opposed to just saying they should. Actually, have to make it enticing for them to do so

What are ways people can get involved in the movement?

- At the adult level, they have the Friends of the Marsh who get out and do clean up and management. “Friends of” organizations are people who live in the area who roll up their sleeves and help out. Authorities have been good about engaging these people. Land trusts have to have board of directors.... join the board. Land trusts have many things that need to be done.

What are your recommendations for future research on this topic?

- Having really good stewards for doing easements, got to have those easements based on the eco-gifts program which is CRA approved,
- there’s all kinds of tool and techniques that we at the Natural Heritage League didn’t know anything about until Ron started sniffing around and found out about it so there’s always research that can be done.
- Private land stewardship is now the way of the future. In the old days the MNR managed your forest. If you had a forest you could sign an agreement to get their land managed for free by the MNR. Now it doesn’t work that way anymore so private land stewardship and the education that goes along with it is I think really important. Stew Hilts did a lot of trial and error type research on this and I’m sure a lot of it is written down but I think that kind of work is very important for land trusts depending on the area that there in and the type of programs that they are involved in.
- If you’re taking easements and that’s your whole program you better make sure you’re using the state-of-the-art easement guide by Ian Attridge, modifying it all the time.
- There’s another book on the history of Ontario’s provincial park system, called Protected Places: A History of Ontario’s Provincial Park System (1993) by Gerald Killan. It has some discussion in the latter part of the book where it talks about the whole system from Tom Thomson in Algonquin park, and the challenge of constraints of 1978-88 and the guy who wrote this used to be a member of the provincial parks counsel. Killan is a historian and a former principal at Kings College in University of Western Ontario so his research is impeccable so this book was put out in 1993 on the occasion of the 100th anniversary of Ontario’s provincial parks. (first was 1893 Algonquin) it is an amazing book. This book has a lot of really good stuff

about how the NHL came to be back in the late 70s after they did all this research and had enough money to protect all the ANSI (areas of natural and scientific interest).

Bryan (after the official interview): When I started in conservation as a 19 year old I was rubbing shoulders with the guys who came out of WW2, field officers for this conservation branch in the mid 50's. These guys were working in what was then called lands and forests and they had this vision to create these watershed authorities and started doing that after the war. And this was a different way of managing resources on a watershed basis. That's where Art Latornell was one of those guys who got conscripted to be a field officer, he was a neat guy because at Guelph he had taken farming and soil sciences, agriculture degree so he and another guy started as a bit of a lark, Sod farm, on some borrowed money and then the other guy Bill Campbell went on and continued to do that and really really prospered while Art stayed in the public service, he was a great naturalist and worked for the FON and all that stuff. When he passed away he left a large chunk of his money to the university of Guelph which funded a lot of work. And then there is this conference they hold each year now called the Latornell symposium which is held in Alliston, it's an environmental conference. Stew Hilts was in charge of how Latornell's Endowment got spend at the university. It was important to me to work with all these pioneers like Mack Kirk and all these people who were the pioneers back in the 50's.

3.2.6. Phyllis Lee Interview

(Interview date: August 11th, 2022 by Interviewer: Brianna Pitt)



When did you first get involved with the land trust movement? (When did you first become interested in preserving natural lands/ becoming a part of the land trust movement? Why?)

- In 2003 I started as a volunteer with the Escarpment Biosphere Conservancy. So that is the first time that I was involved in the land trust movement. I've always been interested in preserving natural lands. I live in

the country, in six acres of forest and my property

is on the Escarpment. I became part of the land trust movement when I finished my corporate career, deciding that I wanted to do something to make a difference, that involved the environment. I was introduced to Bob Barnett at EBC and after that in August 2008, I started working at OLTA. Most fulfilling for me I think, is just meeting all the people that are in the land trust community and hearing about what they're doing and being able to support their work by my "back room activity".... not out front doing the securement, but helping them to do it.

- There are many aspects in terms of contributing to the land trust movement, not just the conservation side, but the office itself that provides opportunities. Volunteering is a good way to be introduced to the land trust movement and when you do, think of the skills you have to offer...
- Back in the day when I started in the early days of OLTA, there were two people in the office and even a short period of time when there was no Executive Director. I think that over the years, I have been a 'constant', (now described as 'Member Services Coordinator') and that constant factor (back when we had an office), would answer the phone and a lot of people would get to know me, to know my voice and to have conversation with me. My role was a supportive one as the organization's executive directors changed over time. Now as we grow, and it has been fast in the last couple of years, my role is to provide as much support as I can, and do what some consider 'tedious work': the bookkeeping, the data entry, answering the phones... that kind of thing, which I happen to enjoy.

Do you have any insight into what you consider OLTA's key role has been in the land conservation movement in the past 20+ years?

- I think OLTA's role in supporting its members is very important and it goes from supporting the very small or emerging land trusts, up to the more mature land trusts. When they change staff, we try to assist, helping when we can and familiarizing new staff with what we do, what the land trust movement is, and what the responsibilities are for a conservation land trust in terms of the Standards of Practices that guide the operations of all land trusts. I see OLTA's key role is in making sure that the Standards and Practices are integral to the work of our land trusts, making sure they are being adhered to and assisting all in the learning process on what needs to be done in order to meet these principles.

3.2.7 Paul Peterson Interview

(Date Interviewed: August 10th, 2022 by Interviewer: Brianna Pitt)



When did you first get involved with the land trust movement? (When did you first become interested in preserving natural lands/ becoming a part of the land trust movement? Why?)

It would have been in the 1990's in Ontario. Maybe even during the mid-eighties we were thinking about doing conservation agreements and land trust work in Ontario. At that time, it was just the Federation of Ontario Naturalists as they

were called then, FON. So, it was just FON and the Bruce Trail Association that were working on this kind of issue.

Why/how did you get involved in the movement?

- I had worked as a land use planner and surveyor in Ontario and British Columbia. So I was familiar with land development and land use planning. But I also knew about the land trust movement in the United States, and I'll let that be a theme here, the fact that the U.S. had already developed these conservation tools for private land conservation was a big advantage to us. We didn't have to invent a wheel we just had to look across the border and say, look at that, look at what they're doing. I knew about that and when I went to law school in 1985, I knew that I wanted to figure out how these land trust tools could work in Canada.

What changes in policy (in your opinion) have had the greatest impact on the land trust movement (either negatively or positively)?

- It won't be a surprise. The two big things are the tax changes to the *Income Tax Act* to allow EcoGifts and to facilitate other gifts of land and capital. And of course, the conservation easement legislation was significant at a provincial level. I think it's interesting you might add endangered species legislation, but I don't see a lot of cross-pollination between the endangered species legislation and land trust work at this point. Maybe it's there, maybe it's implicit, but it's pretty important legislation too, that should be relevant to this work.

In your opinion, what is the most effective method for land securement?

- There isn't one method. Land ownership is very important where land conservation or biodiversity protection is the primary goal, and you can't really tolerate impacts from other potentially incompatible land uses, then you need to use land ownership or more complete control of the land. Conservation agreements are great where you can tolerate some private use, some multiple uses of the property. A good example right now is in Alberta in the prairies, but Alberta in particular where there's a lot of conservation easement work done on ranchland because the current perception is that the cattle grazing and ranching is compatible with biodiversity protection or grassland protection in particular. So that's an example where you can leave it in private ownership, have some private economic use of the land and still achieve some biodiversity protection. So it really depends on what your objectives are for that property. Land use regulation at a provincial and municipal level is also hugely effective and influential and acts on a scale that we could never achieve securing one piece of property at a time. And I might add federally, I'd mention the endangered species legislation again, so that kind of legislation is actually potentially huge.

What has been your most fulfilling experience working in land conservation?

- I don't think I have an answer to that. There are too many. I've probably done more than 100, maybe 200 land conservation purchases and conservation agreements. And I could think of any number of them and speak fondly of the owners and the events that happened. So, I think overall, I'm just grateful to have had an opportunity to do this kind of work. It's, it's pretty cool to be able to do something you're really interested in and loved doing.
- While the land securement projects are exciting and rewarding and everybody would like to be the hero dealmaker that secured the property, there's a ton of hard work to do to raise the securement dollars and to manage the properties. And conservation easements are challenging to sign up, but they're even more challenging to monitor, enforce and administered over the decades and the foreseeable future that we have to take care of them. So, while it's very satisfying to do the upfront, exciting work of land securement, that is almost like the tip of the iceberg in the work the land trusts have to do.

What direction would you like to see the movement go in? (In what ways would you like to see the land trust movement evolve going forward?)

- ... speaking about the land trusts, I think that the need for community engagement, community profile and community support is huge. Right now I work for the Nature Conservancy of Canada and even there business people or other lawyers say, who? What's that? So, while we would like to think that NCC and land trusts are pretty well known many business people, big landowners, people you meet will barely know what you're talking about. So I think that working on the profile of the community, public education and building community support is just a huge need. And I think that putting all the land ownership and conservation agreements in place that's all great, but if 100 or 200 years from now, the communities we live in don't value that and don't support it, the legal tools won't be worth very much. There'll be a new piece of legislation and the world will take off in a new direction. So I think that building support in the community is important and there needs to be an effort to build that profile and support. I admire the organizations, like the Rideau Waterway Land Trust that have done a tremendous job of holding community picnics and public events and they became like the social center for the Rideau Waterway community. I think the Georgian Bay Trust functions like that in Georgian Bay. Those are unique communities where people are going there for recreation, to enjoy the natural environment. So it's relatively easy for the land trust to gain profile and support in those communities because that's why people are there. It's a more challenging job in more urban settings or communities that aren't focused on natural environment protection and esthetic protection as a priority. It's a bigger challenge, but I think it's critical. And I think it's easy to underestimate how much financial support is needed for the long term to keep these organizations viable. I often think of the churches and the fact that for all their challenges, it's remarkable that

something like the Roman Catholic Church and many of the other big churches have survived for centuries. And they among other things, they have a fabulous, dedicated community of supporters, and they are fabulously wealthy. I hope people don't find anything offensive about the comparison, but I've sometimes thought that the land trusts need to head in that direction if they're going to survive. I'd love to see that 200 years from now, the land trusts were pillars of the community and were very financially stable and had really solid community and government support. I think we're still at early steps to build something that's really enduring.

- And when there are challenges the land trusts need public support. In Ontario there are challenges with new highway routes and public infrastructure that can take conservation lands when there are the inevitable land use conflicts and challenges. Then you want to have the support of the politicians and the community and have the voters to say, no, we value what the land trusts are doing. You've got to maintain their land and not take it and use it for something else. So, public support is vital for the long term.

What steps do you feel still need to be taken to ensure conservation success?

- I'm not sure I have too much to add to what I just said. One example is review of the conservation easement legislation. I think with experience, we know that there are deficiencies there that could be addressed to help those agreements endure and be enforceable for the long term. We just have to continue to work very hard to be kind of strategic at a big level and tactically smart at a smaller level. And I think also the value of OLTA is that it adds to the professionalism of the people that are involved in the business. You know, people come to the land trust work often from backgrounds in science or natural sciences or, other areas that may not be related to the work they have to do at the land trust. The training and professionalism that OLTA offers is, I think, critical for the long term.
- I think just working very hard at a big strategic level and at a more tactical level. I am impressed by the work done in the USA, by the Trust for Public Land. Based I think in San Francisco they don't focus just on biodiversity protection like the Nature Conservancy in the USA. The Trust for Public Land is focused on, I think they call it, protecting the land that people love or protecting land for people. So it's not biodiversity for its own sake, but it's linking to that community function and how does the community value it. And they are work on open space protection for cities across the USA and will help them with acquisition and financing. They're the ones that I think initiated the process of doing referendum, on elections that I think they call ballot measures. So they do that very extensive polling of the populations in the states or communities they're working and they arranged to have ballot measures to authorize bonds to fund land conservation. And they're very sophisticated in how they do it and how they arrange the polling, and to gauge public support exactly what the public will support. So I think, this relates to what I said earlier about where the land trusts need to head. I talked about building community support generally,

but the Trust for Public Land and the work they've done in the States is an example of rolling up your sleeves and really coming to grips with the details of that. They ask what does that mean? What would the public support? What do they know about our work? Do the land trusts do polling? I think they have done some of that, but they should consider surveys and polling to understand what level of awareness and support they have now and where they could move to increase it.

What changes would you make, if any? (be it to policy, legislation or the movement in general)

- I have some very specific suggestions of maybe I'll talk to Alison about, but I some of them are to address weaknesses in conservation agreements or conservation legislation.

What has been the biggest challenge(s) you've faced personally or as part of an organization, pertaining to land securement?

- I'm not sure I have a good answer to that one. I had the advantage of having worked in private land use planning practice and municipal planning and years in private law practice on land development and planning work. So when I came to this work, I had a good background to help me deal with it. But I would encourage the people that are working, or want to work in the land trust business to go and get other real-world experience. I have found in many instances dealing with the volunteer board members in a small land trust trying to put together some complicated conservation deal and not really having the knowledge to identify the issues and understand how to do it. I think that increasing the professionalism, experience, the depth of experience and knowledge that people working that business have is something that would be tremendously valuable to the land trust business. And as I said, I would encourage the young people to consider, whatever your field is, if it's engineering or biology or law or accounting or whatever you're working on, go and get some other world experience and bring that experience into the land trust movement. People are smart and dedicated that come to this work. So I appreciate that, and they get things done. And I admire that. But I think that increasing experience and professionalism of the people working on it would be an asset to the land trust community.

What advice would you give to the younger generation interested in joining the land trust movement?

- As suggested above, I would I'd look for experience in other areas and work in other areas. Just coincidentally, last week, I met with a young law student who's just starting at U of T in the month or so. And I encouraged her to if she had a chance to go and work at the big law firms, or a good boutique law firm because you'd get unparalleled experience in the business world and the legal world of how to perform at a very sophisticated level of professional practice. And even if you didn't want to

do it forever, go and do it for a few years. I worked at one of the big law firms in downtown Toronto and started land conservation work at the same time, but I found the experience from working like that was tremendously valuable and still is to me today. I use tools from commercial real estate in getting land conservation deals done. Whether it's biology or law or accounting or any area of work, go and get some other experience and bring that knowledge back to the land trust movement.

- On a related note, you'll see that when you recruit knowledgeable board members, you recruit board members who are well connected from big industry or banks or whatever. And those board members are just tremendously valuable to the land trust because they know people, they know how to get things done. And I would just urge the young people on the staff to try and get a broader level of knowledge and experience.

What are ways people can get involved in the movement?

- I guess that's almost infinite, depending on your interest. Other people will know the answer to this better than I do. There are volunteers at the property level to do stewardship and the conservation agreement monitoring. I think if you're a more experienced person serving on a board or an advisory group would be an obvious way to be involved. And there's actually a lot of work to do. I think, as I say, we're just at the tip of the iceberg right now. And if we were to take the route of the Trust for Public Land and become more sophisticated about polling and understanding political and community relations and how we fit in, there's a tremendous expertise and a tremendous amount of work to be done that people can do on a volunteer basis.

What is the biggest challenge in managing land owned by your organization?

- I won't answer on behalf of any organization. I'll just answer based on my experience working with a number of organizations. I would say being ready to deal with the conservation agreements. I don't think the land trusts appreciate how challenging that can be when the generations of landowners change. When you have a new landowner who's not interested in conservation at all and is just trying to work around your conservation agreements, land trusts need to be thinking about how they are funded for enforcement and how to work with those landowners. I think it is a very big challenge for land trusts and a reason they need to be cautious about the conservation agreements. They're only contracts for land use that need to be enforced, and it's a big challenge to maintain a good working relationship with the landowners, especially when you find some land owners don't want a good working relationship with you.

What method of land securement has led to the most success within your organization?

- It depends on what you're trying to accomplish. I talked earlier about why land ownership is valuable, where you really want to prioritize biodiversity protection

over anything else, or maybe even public access and recreation over anything else. Then you need to own the land. There may also be opportunities for land trusts on crown lands., Canada is what? 90%? Ontario is 90% Crown land? So how can you influence the licenses and resource rights that apply to Crown land? How can you work with indigenous communities on Crown land areas. There is potential there to influence much larger scale landscapes than when you are dealing with conservation agreements and ownership of private land

What do you remember about the early days of OLTA, or what was known as Ontario Nature Trust Alliance (ONTA) before 2002, and what role (if any) did you play in OLTA's work over the years?

- I was a board member a couple of times, for a couple of stretches, mainly at the beginning. I initiated the incorporation of OLTA in 2001. I have about a five-page memo that I wrote in February 2001 to the Ontario Nature Trust Alliance Planning task group. And it was outlining, should we form an incorporation and what are the advantages or not, and what kind of an organization should it be. So it was all set out in charts, so people could consider what can you do if you're a corporation? What can you do if you're a non-profit? What if you're a charity? What form of organization do we want it to be? We wanted to have a charitable corporation, but people had to be convinced at the time.
- There was resistance to the formation of OLTA in 2001. Some people were concerned about administrative headaches, bureaucracy and expense. Luckily, we did have the example of the Land Trust Alliance work in the USA. So that was a tremendous incentive. You didn't have to visualize it and imagine it. You could see it. So that was that was the inspiration to create OLTA. And other people were really central to that. I think the three applicants for incorporation were myself, and Stew Hilts and Dave Walker. Stew Hilts was a professor at the University of Guelph, and Stew was the real godfather to all of this. He trained generations of students at University of Guelph in land conservation and these kinds of issues. And many of the people who were interested in the work had Stew as a professor at one point. So, Stew was very supportive and really the big ideas guy behind this. Another fellow key contributor was Dave Walker. Dave was a tremendously hard worker, very smart guy. He was a fabulous backroom operator. He didn't want to be the front man up in front of the stage, taking the glory. He'd just like to work behind the scenes and get everything done. Dave and I went on to work together to organize a few national conferences for land trusts. Stew was the big ideas guy. I think he's a real inspiration to a lot of people to get this started. Together with Ron Reid who has done so much to lay the groundwork for what OLTA and the land trusts can do today. Dave Walker was a workhorse and I did the paperwork putting the OLTA incorporation and charitable status together.
- I've mentioned some of the key players, and I think there was a teacher from Thames Talbot Land Trust. His name was Bernie VanDenBelt, and I think Bernie

might have been the first president of OLTA, or certainly he was an early president. So I just realized when I mentioned Stew and Dave I didn't mention Bernie, but those were the people that I remember as rolling up their sleeves around the table and said, okay, let's get this thing organized. So it's just a shout out to them and recognition of the work they did.

Do you have any insight into what OLTA's/ONTA's role has been in the land conservation movement in the past 20+ years?

- I've noticed that OLTA is very well appreciated and supported by the land trusts. I think the land trusts are still, in Ontario, are very supportive of it and see it as an integral part of their work. So 'good job to Allison' and the people that came before her like Dave Walker, to have it as a value added organization for the land trusts whether it's lobbying or promoting land trust interests and points of view with government or working on the training and professionalism. Well, there's so much it does to support the land trusts. Another example is tackling insurance issues which all of the land trusts share and just all the dozens of little issues that come up in this work. I think OLTA has been an integral and important part of that. I don't think the land trusts would be able to make the kind of progress they have if OLTA hadn't been there to help organize the efforts and pull together and share resources.

Additional Comments:

- I started doing land trust conservation work in the late 1980s, but we didn't have many tools then. We can do a better job for ourselves and for the landowners with the tools we have now. I remember in 1990 or 1991 I worked with a landowner, who had more than 1000 acres near Uxbridge, Ontario, the owner thought that he would have to sell the land for gravel pits because no one else could afford to buy 1000 acres at Uxbridge. To make a long story short, we went and talked to the Toronto Region Conservation Authority and TRCA was tremendously interested and in the end, they purchased the land. Today it's called Walker Woods and it's part of a big complex of Glen Major conservation land in that area. I think the 1991 acquisition is still the largest single acquisition TRCA ever did, but when I look back we had very primitive tools. I remember the last 100 or 200 acres were donated to TRCA, But we did not have the split receipt tools, the Ecogift program or the funding that is available now.



3.2.8 Ron Reid Biography and Interview



Ron, a resident of Washago Ontario, is one of the founders of The Couchiching Conservancy and has made countless contributions to the land trust movement in Ontario and beyond. He is the author of many valuable works within the land trust community including [Bringing Trust to Ontario](#), [Creative Conservation: A Handbook for Ontario Land Trusts](#), [Islands of Green](#), [Beyond Islands of Green](#), and numerous biodiversity investment and wildlife habitat reports and management plans. He is an avid birder and enjoys canoeing throughout Ontario with his wife Janet, who co-wrote *Canoeing Ontario's Rivers*. He attended the University of Guelph where he obtained a degree in Wildlife Management (Biology). Upon graduating, he worked for Ontario hydro for 5 years as an environmental planner on transition lines. He then worked with the Federation of Ontario Naturalists (FON) for 5 years as the Conservation Director. He and his wife Janet traveled internationally with for a year and settled outside of Toronto in Washago, where he worked as a writer and natural heritage consultant (Bobolink Enterprises) for around 20 years. In the early 2000s, he became the first executive director of the Couchiching Conservancy for 7 years and has since semi-retired, working primarily on acquisition projects over the last ten years but also works for a wide range of clients in consulting including the NGO and government sector.

When did you first get involved with the land trust movement? (When did you first become interested in preserving natural lands or becoming a part of the land trust movement? Why? Year?)

- Worked with Ontario Nature in advocacy roles.
- Mid 80's was when I first became aware of the land trust movement, particularly in the U.S .
- Working then as environmental consultant.
- Asked by Bryan Howard – to complete consulting project to look at land trusts in the US and elsewhere and see what potential there was to bring that concept to Ontario. Gave me the opportunity to delve deep into land trusts, I visited land trusts in New England, and corresponded with people in Britain. They thought of them as wildlife trusts or heritage trusts. Australia also had some early land trust organizations but nothing that particularly stood out at the time. I prepared a report about trusts, “Bringing Trust to Ontario”, on my thoughts and findings.
 - I was suggesting that while there were some impediments in Ontario in terms of law and policy, the idea of community based or regionally based land trusts made a lot of sense. I could see how they were very successful in other jurisdictions and it was an idea that was really worth pursuing in Ontario. That was the start of how I got involved in it [land trust movement].
- At the regional level – opportunity came along in the 1990's early thinking, looking at what we could do locally with the land trust idea – lead to the formation of the

Couchiching Conservancy in 1993, the land trust I've been involved with for 26 years - it all started because we were just outside of various CA's jurisdiction and authority

- Conservation authorities through the 70s and 80s were fairly active in land acquisition of various kinds, so to a certain extent they were filling that land trust role. But at the time, there wasn't really an organization that was willing to be involved in things like land donations and conservation easements and all of the other tools that land trusts could use in our area.

What changes in policy (in your opinion) have had the greatest impact on the land trust movement (either negatively or positively)?

- Can be perceived a negative or even a positive – when Mike Harris government and his government elected in 1995 – very oriented towards reducing role of government and reducing expenditures of the provincial government. It was a turbulent time, kind of like where we are now, except more so – cuts to education, health care, social work, etc – also on their agenda cuts of role of government in conservation – provincial government not to be involved in conservation of natural areas at the local level.
- They did maintain and expand their role at a provincial level with provincial parks and conservation reserves but at the local level, they essentially said if you want to conserve natural areas in your communities, you're going to have to do it yourself. Which was parallel to a number of other fronts as well.
- This gave a jump start to the land trust movement because people at the community level in many places were still very concerned about protecting natural heritage. So, they looked to the emerging land trust model as a way of doing that. Prior to 1995, there were 4 or 5 land trust organizations at the local/regional level that were active but all at a pretty early stage - A couple of early organizations like the OHF and the FON at the time had nature reserves as part of their portfolio and were interested in doing work at that level but they weren't equipped for the scale that was needed across Ontario.
- This government actually addressed some major issues in terms of tools that we needed at the community level to make this effective – conservatives passed the legislation *Conservation Land Act* – allowing land trusts, CA's and municipalities to hold CEA's.
- Around this time, the federal government established the ecological gifts program, providing tax incentives for donations of land. That was the major change enticing people to get involved, so both at the provincial and federal level there were changes in policy that were extremely important and didn't come without people pushing for them.

In your opinion, what is the most effective method for land securement (for landowner AND land trust organization)?

- There isn't any one – not possible or particularly useful to say only one is effective – it's a combination of things.
- A change at the federal level, recently, is the idea in which you donate part of the value and keep the rest. It used to be that it had to be all one or all the other; either pure donation or pure purchase. The mix and match is important in way of structure so they can use that to offset the capital gain of purchase.

- Pairing tax incentives to offset capital gains on the sale portion of a transaction to a land trust can be very effective.
- My sense after being involved for the last 30 years or so, is that it's so landowner dependent, based on what they are inclined to do and what they are able to do. Family or financial abilities.
- Three primary tools/ methods: land donation (full or partial), land purchase (full or partial) and conservation easements. Those 3 methods have a lot of applications in various circumstances but the application depends on landowner.
- Some landowners might never be in a position to donate outright but still want to see the values of that land protected, so in those circumstances CEA's might be thing to allow them to do that. In other circumstances they can work with a land donation scenario and in some circumstances the only thing that's going to work is outright purchase.
- There is a thinking that you can focus on one or the other [land securement method] but certainly I don't think that is true. You limit yourself by saying you won't do one or will just do the other.
- Many landowners are not ready to consider protection arrangements while they are actively protecting the natural values on their own. But when they are older, and start to wonder what will become of their cherished property after they are gone, then they look to a land trust to work on longer-term arrangements.
- "It's a lot about continuity, one of the very valuable things about the land trust movement is you can work with a community and you're there for the long term."
- It's that kind of ability to be there for the long term that I think adds an enormous amount of value that no government program in the world can do.

What has been your most fulfilling experience working in land trust conservation? (More specifically, land securement?)

- Purchase of a piece of property, 730 acres along the Black River [Ron Reid Nature Reserve]. It's in an area [where] the alternative would be that someone would buy it and it would get split up into smaller lots and alongside the river there is demand for cottage lots... we were able to put together a deal that I negotiated, it was actually probably the easiest property we have had over the year to raise money towards, we raised about \$550,000 when we still had three months left to go with the campaign.
- Shanty Bay – Church Woods – was owned by a family who had it since the 1820s and now the family had 9 members who owned it in a family trust. We worked with the family, neighbors, members of the public community. The family donated a part of the value, and working with the community we raised just over \$600,000. We were able to create this nature reserve which is really important to the local community and it was a great example of what a small community can do when they are really determined, and the land trust was essentially the vehicle to make it happen.

How have you seen the land trust movement evolve over time? (i.e. securement methods, formation of land trusts, etc.)... What are some milestones (periods/ eras) that you've seen emerge within the land trust movement?

- Land trusts have expanded considerably – some have taken a while to find feet – some still haven't – some can't make projects come into fruition due to various reasons – seen land trust growth not only in southern Ontario but throughout the entire province - growth at local level.
- It's been kind of a steady progression rather than one major milestone or another major milestone.
- Changes in securement methods and tools such as the ability to do partial donations through the Ecogift program. Federal funding programs have been really important in terms of upping the capacity for land trusts.
- Interesting at OLTA gatherings - listening to land trusts report on what they have been doing and its partially the quantity of lands that they are involved in but more so the increasing scale and sophistication of projects.
- Couchiching – we have been involved there for the last 25 years in acquiring lands mostly through outright purchase but some conservation easements and some donations - goal is to become more strategic in land purchase – 5 year strategic planning process – identified 3 other areas where we want to focus our attention. Some plans available online.

What direction would you like to see the movement go in? (In what ways would you like to see the land trust movement evolve going forward?)

- Expansion into parts of Southern Ontario dealing with mostly private lands where we don't have land trust coverage. For example, Grey county and South Simcoe county, where there are enormous development pressures there but there is no land trust that focuses on that area.
- Organizational development – how to bring land trusts to next level in terms of effectiveness – transition to having some staff/ manager tools (role of OLTA) & funding to sustain staff to do the “leg work” but keeping board members and other volunteers as key participants - the key here is funding to sustain this structure for organizations.
- Standards and practices are important - setting out expectations that the organizations should meet and making sure there is a minimum standard that everybody has to meet.
- Concern is if you've got organizations who are not functioning effectively or in the worst case fail, others have to come in and pick up the pieces, which hurts us all in terms of credibility. Credibility within the funding community, credibility within the government oversight agencies but most importantly credibility with land owners.

Who in your opinion has had a major impact on land trust conservation in Canada/Ontario? On land securement?

- Dave walker – passed – involved in founding the Rideau valley land trust, OLTA, Canadian LT alliance.

- Stew Hilts.
- Ric Symmes – has been very strong on the value of partnerships – achieve more by working together – helping NCC to become better in partnerships - Thames Talbot Land Trust.
- Barb Heidenreich.
- Angus McLeod – involved in the Thousand Islands Land Trust, Parks Canada and the early OLTA days board member.

What steps do you feel still need to be taken to ensure land trust conservation success?

- More funding – ability/ capacity to raise more money.
- One concern I have about organizations is the tendency to depend way too much on government funding, programs, grants – dependency on government funding – we at CC wanted to diversify (1/3 self-generated, 1/3 gov't, 1/3 private) – organizational funding for continuity (not putting all eggs in one basket).
- Profile and community awareness - reaching landowner and donor base to make presence known and to gain support.
- Want public to view land trust like local hospital – community involvement & transparency - and when there's an issue of land preservation, local land trust should be the first to pop into minds.

Are there any influences from your childhood that motivated you to be involved in land conservation and now stand out? (memories/ people/ books etc.)

- Books – A Sand County Almanac by Aldo Leopold [well known for quote, "A thing is right when it tends to preserve the integrity, stability, and beauty of the biotic community. It is wrong when it tends otherwise."]
- I have a degree in wildlife management (biology) from University of Guelph – grad of 1972.
- I was originally a hunter but became much more engaged in bird watching and became a naturalist over the first decade of my career and eventually gave up hunting and said I would rather look at the critters than shoot them. lots of people involved from the hunting community.
- I had the opportunity to work with David Crombie – completed a lot of work with the royal commission on Toronto Waterfront in environmental policy– how people perceive landscapes – taught me the value of collaboration, multiple organisations involved.

Did your education (formal/ informal) play a role in your involvement in the land trust movement?

- Yes absolutely. Setting the basis – beyond choice of subject matter, I was involved with a group of students and profs in late 60's early 70's who were able to question everything, debates and informal learning.
- I got discouraged in the late 80's and 90's – I'd arrange guest appearances in university classes – really hard to get students truly engaged on the subject matter.

- We had professors [in the 60's and 70's] that would challenge us and that's something that sets you up for a lifetime of being able to think about things independently rather than just accepting whatever you are told.

What has been the biggest challenge(s) you've faced personally or as part of an organization, pertaining to land securement? What is the biggest challenge in managing land owned by organisation(s) or agencies that you have been involved with?

- Biggest challenge – being able to demonstrate to landowners that as an organization, you have the ability to protect the land in perpetuity – in most cases it's land that's been owned by individuals for a long time and their often very proud and concerned about what's going to come in the future – their big question is “how can I trust you and your organization to make sure that you actually can look after my lands in the long term?” - When you are a young land trust that can be a tough question to answer.
- Establish credibility – big surprise for me in that process is how grateful landowners are to have organization to take over responsibility to safe-guard land for ever. Point to past experiences.
- It blows you away because you think they are doing you a huge favor by donating their land to you but for some people its the organization that's doing a huge favor by saying, “we are going to take these lands and we are going to protect them in your honour”. It's a peace that they needed. When you see that it is a very rewarding feeling to be able to work with someone like that.
- Larger challenge – invasive species – garlic mustard, dog-strangling vine, emerald ash borer – more time and resources trying to control the invasion of damaging species on properties - something that 20 years ago really wasn't an issue but it sure is now. Linked to climate change and so on. But it is definitely a complex issue.
- Biggest challenge - people - Land uses on reserves for the landowners and for the community and how they want to see the land utilized.
- How do you manage human interferences – It depends very much on what your management objectives are for the site (i.e. establish/ preserve grassland bird habitat, community uses etc.).

What has been your career path (positions in public, private, or NGO) to date?

- Started at Guelph in Wildlife Management (Biology).
- Ontario hydro for 5 years – environmental planner on transmission lines.
- Conservation director for 5 years with FON.
- Travelled internationally w/ wife Janet for 1 year – settled outside of Toronto in Washago and worked as a writer and natural heritage consultant for many years. I worked for a wide range of clients in consulting a lot of them in the NGO sector, some government projects but not really private sector.
- In the early 2000s I became the first executive director of Couchiching Conservancy (CC) for 7 years.

- I then semi-retired and worked primarily on acquisition projects over the last ten years.

And in what ways would you say that your career path has been helpful to you to date?

- Some of it may be less obvious, my 5 years with Ontario Hydro, one of the things they did there was to teach you how to run an organization and how to do a budget all those kinds of things.
- Addressed in previous questions.

What is your future career path (positions in public, private, or NGO)?

- Still involved on contract work part-time for CC.
- Still involved in programs for grassland conservation.

Who do you see as promising leaders in this movement? (this question implies specific individuals).

- Mike Hendren – who was the Executive Director at Kawartha Land Trust – now Ontario vice president for NCC – kind of person who can go a long way and make things happen.

What are ways people can get involved in the movement?

- Becoming a broader plane for people to get involved – paid employment – growth in terms of land trust organizations ex. CC stewardship manager who will eventually retire and we'll look at a couple positions for stewardship management, so there are young people around for whom that is an attractive prospect.
- Younger person to specialize in land securement, doing the deals and raising the money and so on. More shift in the future towards this I see – government roles becoming less available so the availability becomes more prominent in this realm.
- Getting involved as volunteers – can lead to a career path – CC has over 400 active volunteers – in the last 2 years, volunteers have become involved in citizen science.
- Young people – developing field skills - We have set up programs where people can sign on and get training and be involved in activities where they can go out in the field and do things. That has been a very good way for people to get involved as well.
- There are different types of activities for people with different skills can get engaged in, depending on the need.

What are your recommendations for future research on this topic?

- Compiling information on what impact are we able to create, at what cost – making the case for how we make a difference and how to continue so in the future. And being able to use that as justification for support particularly from government programs.
- Research – what are the areas where there's a need for that training?
- Provide resources needed for organizations growth and quality – meeting standards and practices – need to be followed along and kept up with.

- We, the land trust community, have the role and critical need to play a role in addressing/ mitigating climate change – what info do we need to play a role? We need to think through what are the kinds of information we need to make sure that we can do that in the most effective way possible.

Do you have any questions, comments, concerns? Feedback and/ or recommendations for how we can improve this interview?

- Comments for OLTA: Encourage OLTA to be aggressive as possible in expanding their roles and a strong voice to speak for land trusts
- I'm much less enthusiastic/ more sceptical about the role nationally. I know the Canadian Land Trust Alliance had its problems over the years and I'm a bit of a sceptic, I can very clearly see the importance of the role for a provincial coordinating organization for land trusts.
- Federally, I'm less convinced there is really an importance in having a major organization coordinating things at that level, I'm not sure that it adds that much value and it can take an enormous amount of time and effort to navigate all the shoals of provincial jealousies, etc.
- At that level, how many organizations can you sustain, is the care and feeding of that organization going to take away from work on the ground? Or work at the provincial level? I do think there needs to be some kind of coordinating mechanism but I'm not sure it needs to be a full-fledged organization staff and so on.

On August 29, 2022 Ron Reid was interviewed by Brianna Pitt ...while there is some overlap, the conversation below provides more detail on Ron's key role, actions and thoughts on Ontario's land trust movement:

When did you first get involved with the land trust movement? (When did you first become interested in preserving natural lands/ becoming a part of the land trust movement? Why?)

- I've been interested in preserving natural lands for the most of my career, dating back to the 1970s. I did purchase some land up on the Bruce Peninsula in the late 1970s, which I held for quite a few years. Eventually, due to changing circumstances, we put a conservation easement on it with the Ontario Heritage Foundation because that was kind of the only game in town at that point. We sold the land and so as far as I know, the conservation easement is still in place and I presume they're still enforcing it.

Why/how did you get involved in the movement?

- I used to spend weekends often with Bryan Howard and Frank Shaw and some of the people you've already interviewed. And they also had pieces of land on the Bruce, which were essentially privately held for nature conservation. So I'd always been interested. When it really changed for me was in the late 1980s, I believe. Around 1988, when Bryan Howard was working with the Ontario Heritage Foundation, they were sort of finding

their way into natural heritage conservation as well as cultural heritage conservation. Bryan had come across the idea of land trusts, was interested in the idea, and they contracted me to do a brief overview and analysis in terms of the potential for land trusts in Ontario. That resulted in a little report called Bringing Trust to Ontario. That was sort of the first, I think, significant step towards land trusts being active in Ontario.

- There were some active organizations like Nature Conservancy of Canada which at the time actually was a land trust because that's basically what it was doing. But it didn't think of itself in those terms. Since then, it has morphed and grown into calling itself Canada's largest land trust, which is certainly true. NCC is still very active in acquiring and protecting and managing natural habitats across Canada and in Ontario as well. It has also become a major supporter of local and regional land trusts, providing access to funding and often working collaboratively on acquisition projects.
- Research for the Bringing Trust to Ontario report was based partly on a field trip; I went and visited four land trusts in the northeastern U.S., in Maine, New Hampshire and Vermont. By correspondence and telephone, I also interviewed people involved with the land trust movement in Britain and in Australia. I was trying to provide an overview of what kinds of things were going on in other parts of the world. Also, a bit about some of the challenges they faced and their successes and areas where they didn't have as much success as they would have liked. The report coming out of that, this Bringing Trusts to Ontario report, was intended to be a discussion starter and it certainly met its purpose in that sense. It had a fairly broad distribution within the conservation community and I think prompted some people to think, yes, this is a great idea; we should be pursuing this.
- Others, I would say among many conservation authorities who perceived this as perhaps something that they should be doing. They had certainly done considerable land acquisition and they would like to be doing more. So, this concept of land trusts was kind of an idea in their minds that was redundant. Eventually that sense faded and I think they've become more partners and supporters of the land trust movement. But there was certainly some discussion in the early days about whether or not this was even appropriate, especially in Southern Ontario, where most of the landscape is covered by conservation authorities.
- From those kinds of discussions, I guess the idea of land trusts kind of went two directions. One was a general awakening of interest in various parts of Ontario on the idea of the potential of land trusts. There were several regional land trusts that started up in the early 1990s. The Rideau Waterway Land Trust would be one of them, and another organization along the St. Lawrence Islands. The Lower Grand River Land Trust was another early adopter, and the Long Point Basin Land Trust not long after. Other areas like Grey-Bruce and Niagara Region had discussions about forming a land trust but those never hatched. Boy that was a long time ago!
- One of the other organizations which picked up on it and was very interested was Ontario Nature (Federation of Ontario Naturalists at the time) because they had for quite a number of years assembled a series of nature reserves. They had a nature

reserves Committee, which was chaired by Stew Hilts for many years, and so they already had a portfolio of properties. Because I had worked for FON earlier in my career, I know there was an ambivalence about to what extent they should be directing their resources and their energies into acquiring lands and that kind of direct land trust work, versus focusing all those energies into advocacy and changing government policies - prodding the government to be more active and to put more resources towards conservation of natural areas. I would say over the last 20 years, they've done both. Part of that has been increasingly recognizing the importance of their role as a land trust.

- One of the other land trust organizations which started out relatively early in 1990s was The Couchiching Conservancy. A group of about half a dozen of us in the local area shared an interest in this sort of thing started looking at an area of interest as North Simcoe and the Carden Plain just to the east of it. In Southern Ontario, this is one of the most biodiverse areas with still with lots of possibilities for land conservation. It was also an area that for the most part didn't have any Conservation Authority involvement. So that whole question of whether or not you could do this through the Conservation Authority wasn't even relevant.
- After considerable discussion and planning, by November 1993, the Couchiching Conservancy was incorporated as a not-for-profit, we had our charitable number, we had our initial board of nine people, and we were ready to go. I was the first president of that organization and stayed on the board for the next four or five years I guess, until we were in a position to hire some staff and I became the first Executive Director of the organization for the next seven or eight years. I still have been quite involved in that organization for quite a few years as a sort of occasional contractor, to take on projects so I still do that kind of thing. And I also am involved as a volunteer in quite a number of things as well.
- So far The Couchiching Conservancy has been involved in conserving more than 15,000 acres across our region. Some of those are lands that we own, and I think we are up to about 30 reserves in various parts of our area. We have about a half dozen or more conservation easements across our area. We've also been very active in terms of volunteer engagement, getting people involved and interested in various aspects of land management for nature. And it seems to have worked fairly well.
- You know, one of the things I heard about land trusts from one of those in northeastern U.S. was that the land trust has to do the work to make itself seen by the local community as a valuable part of that community. The way one person put it was that if you think about health care, you think about your local hospital; if you think about the health of natural areas, you should be thinking first about your local Land Trust. I would say for Couchiching, that concept has worked fairly well. For some number of others it has as well; for example the Thames Talbot, the Rideau Waterway, the Muskoka Heritage Trust, to name just a few. There are a number of land trusts scattered across Southern Ontario where they have become very much a valued part of the local community.

- There are others who have struggled. Who have sort of started out, but for one reason or another haven't been terribly successful in terms of attracting donors of land or of money towards acquiring land. They have just sort of stumbled along and haven't really reached the tipping point where they become a strong and viable organization. Sometimes that takes quite a while to happen, I guess sometimes it doesn't happen at all and the organization eventually fails. I don't think we've seen any of those in Ontario yet, but we've certainly seen some that have spent a fair amount of time just talking and meeting, but not really achieving a whole lot, which is really unfortunate. I guess that is one reason that the need for an alliance that became fairly obvious to assist those struggling organizations.
- There were more and more land trusts popping up in various parts of Southern Ontario. It was clear that we needed some organization that could speak for them at the provincial and national level and could provide things like common standards to maintain the credibility of land trust organizations, could provide training and information sharing, the kind of thing that goes on with the OLTA fall gathering and so on.
- Quite a few of us involved in the land trust movement in Ontario in the early days had gone down to one or more of the land trust rallies in the US that were sponsored by the U.S. Land Trust Alliance. Those were, and still are, I think pretty mind blowing. I mean, a couple of thousand people and really quite amazing speakers and panels talking about what they were doing. There was a lot of meat there and a lot of enthusiasm. When you meet all these people doing these neat things and you come away thinking, well, we can do some of that too, you know, why aren't we? So one of the other ways that I was involved over the early years was trying to address some of the hurdles in government policies and programs that were kind of holding back the land trust movement.

What changes in policy (in your opinion) have had the greatest impact on the land trust movement (either negatively or positively)?

- I would say most of the changes have been positive, not all of it, but most of it has been. Part of it started back in 1995, I think, when Mike Harris got elected as Premier of Ontario. A very staunch conservative and someone who wanted a smaller government and lower taxes and all of those kinds of things. Of course, we were somewhat fearful of all of that in terms of land conservation and with good reason. One of the things he said about nature conservation was that if people want that they're going to have to do it themselves because the government is not going to be in that business in the same way as it has been in the past. He said the same sorts of things about healthcare. That if communities really needed this stuff, then they better tighten their belts and figure out how to do it at the local area. So when we were looking for assistance from the provincial government in terms of policies, that gave us the opening to go and say, well, the Premier says that communities have to do it themselves and here we land trusts are, that's exactly what we're about, but we need some help from you. It's not going to cost

you a lot of money, but it's things that are really important in terms of allowing us the ability to be effective.

- I'll probably forget some of these, but one of the things that was really important for us was the ability for organizations to hold and enforce conservation easements with a minimum of red tape. At the time there really was no legislation specific to conservation easements. The Ontario Heritage Foundation could hold them because of some of the clauses of the *Ontario Heritage Act*, but it was a bit cumbersome.
- So one of the things we said we needed was some piece of simple legislation to allow organizations like land trusts to hold conservation easements and have the legal ability to enforce them, if necessary. They came through with something called the *Conservation Land Act*, which did exactly that. That has made life a whole lot simpler for land trusts ever since then, in terms of having that ability.
- The province also provided a little bit of a financial incentive in terms of the CLTIP program - the Conservation Lands Tax Incentive program. So that most lands owned by land trusts could qualify under a category called 'other conservation lands'. That addressed one of our issues because the ongoing property tax burden of holding so much conservation land can be quite significant. In true government form that worked really well for the first few years. Since then, they've been gradually chipping away and chipping away by making it harder for properties to qualify and a bit more difficult in terms of the application process and all of that sort of thing. So it hasn't stayed as neat and clean as I would like to see. But there are some benefits to that too, in a sense. If I had my druthers, I would want to look for something more like the Agricultural Lands Tax Program, which means you only pay 25% of what the normal tax burden would be if you were if you were working strictly off the assessed value. I think most land trusts could handle that. And the reason that I say that it has some benefits is because I don't want to have to go into a meeting with the municipality, especially in the public, and having councillors or mayors saying you guys don't pay any taxes on all this land you own. It's much more beneficial if you can say, yes, we do pay some taxes, but the municipal services that we need are also substantially less. You don't have to worry about picking up garbage every week from our sites. You don't have to worry about school bussing for kids or a whole bunch of things because of the nature of these properties as protected and not including any development. And I think most municipal people kind of go, well, okay. But if you're saying that you're having to agree that we don't pay any property taxes at all, that is a real easy way to lose support at the municipal level.
- There are a couple of policy changes at the Federal level as well, which fall under one package, the Ecological Gifts Program, although the changes came in stages over several years. This Ecogift program provides pretty substantial tax incentives for people to donate properties or part of the value of the property. There's all kinds of wrinkles in terms of how that affects a donor's income taxes. It can never quite match what a property owner would be able to do financially if they sold the property and paid the taxes. But it can come fairly close. The federal government has done little bits of

adjustments to this program over the years, such as extending the number of years that a donor can carry forward the donation credits. One of the things that's been very helpful as well is that now you can allow a landowner to donate part of the value of the piece of property and get the tax benefits for that part of the property, and the land trust purchases the rest of it. In the first four or five years of the Ecogift program, it was all or nothing. Either the landowner donated the property and took the tax benefits, or you bought the property outright. There was nothing in between. But we've been finding this in-between piece is something that we use often. So the federal government have certainly taken some important steps on the policy front as well.

In your opinion, what is the most effective method for land securement?

- It's difficult to give a general answer on that because it depends very much on the circumstances of the landowners that you're dealing with. There are a certain set of landowners for whom the idea of a conservation easement works really well. It may be because they're in a circumstance where they're getting to my age and they're thinking there's this property which we love and cherish, but we're going to have to give it up, pass it on to someone else. Maybe they're not in a circumstance where they can afford to donate it outright to a land trust. So they can put a conservation easement on the property and then sell it and have the assurance that it's going to be protected for the long term. That includes actually more circumstances than you might think; people who say, I want to pass it on to my children, but I don't trust what they'll do with it. So I want to put a conservation easement that's going to tie their hands. Sometimes you get to know more about families than you would want to.
- So I don't think there's any one technique that you can point out and say this is the one that's the best. Personally, I love getting the ownership of property because then you have control of it. But you also have all the costs that go along with ownership and the costs of managing it. So I think it depends very much on individual circumstances.

What has been your most fulfilling experience working in land conservation?

- Well, I'll pick a couple. One was a project that I worked on up along the Black River, where we purchased a piece of land, 740 acres, including about four kilometers of the Black River, both sides of the river. Just an amazing property in terms of its biodiversity. The project was a full purchase, so we raised a lot of money to make it happen. Without my knowing anything about this, the board of the Conservancy decided that it would be called the Ron Reid Nature Reserve. So in recognition of my long time involvement and in terms of making the conservancy work; that's pretty fulfilling for sure.
- The other experience is a very different one. I was very involved working directly with a chap who had purchased some 30 years ago a beautiful 18 acre piece of hardwood bush out on the Oro Moraine. He had been diagnosed with cancer and when he and his wife called us and said we really strongly want to see it preserved and want to donate it to the Conservancy. At that point, their doctors were saying he may have six weeks or so left. Do you think you can do something in six weeks because he really wants to do it

while he's still alive? We pulled out all the stops to get everything done quickly, and we did do it in six weeks. We had a little ceremony at the property in early October, with a bunch of his family and friends. We had a sign up and we did nice little speeches and so on. Then this chap spoke from his wheelchair and talked about how appreciative he was of the Conservancy, being there and being willing to take a responsibility for this property and how he really wanted his grandchildren to have the ability to come and to experience this property and to cherish it, just as he had. His young grandchildren were there with them and they were bringing him leaves and he'd say yes, this is a beech leaf or whatever. He had a wonderful day, I think, he was very happy about the whole thing. That was on a Saturday and he died Sunday night. When his wife called me, she said all he was waiting for was for that property to be put in place; he hung on for that because it meant that much to him.

- We had another one - a nice property along the Head River and the owners decided to do a part donation, part purchase. They had lost a son to cancer when he was 28 and they wanted it named in his memory because he had spent a lot of his time in those woods.
- So there's all these motivations all tied up in land conservation, with various people. It's kind of a privilege to be able to work with these families and to be able to say, okay, let's do this. You know, we can do this. And they go, yes, yes; that's what I want to do. What a great way to make a living, or to spend my volunteer time. To be able to go out and work with people who are so motivated. It's not always that way, or course. There are some landowners who are only interested in the money. But there's a remarkable number who are seeing the Conservancy as an organization that can help them achieve their objectives.

What direction would you like to see the movement go in? (In what ways would you like to see the land trust movement evolve going forward?)

- Certainly, I'd like to see OLTA become stronger and more active and better financed and all of those good things. They already do really good stuff for the gatherings and in training and other programs. There's lots more that could be done, of course, if resources are available. One place I think that's really important is the whole standards and practices process and making that more and more mandatory for land trusts. Ensuring that we're doing things properly and that you maintain the credibility of the organization, so that you don't end up slipping in a pile of mud because you tried to shortcut things, is vital.
- Another part that was there when OLTA was originally established, was being a voice to speak to government, to provide advocacy where it's needed and to look for opportunities where our objectives align with the government's agenda and make sure that government understands that. For example, this whole thing about 30% conservation by 2030. I'm not sure whether it's been resolved or not, but there was a lot of debate about whether or not land trust properties could qualify as protected under

that sort of definition. I know OLTA has done a fair amount of work on this, but I've sort of lost track of what yet needs to be done. Somebody needs to be saying to government, over and over again, look at what we're doing, look at standards and practices and look how a number of small pieces are knitting together into the larger landscapes that are protected and where we are often in conjunction with the with government agencies. This 740-acre property that I mentioned is surrounded completely by Queen Elizabeth Wildlands Provincial Park. But the provincial park has no money to buy lands. So the Parks staff were just absolutely delighted that we were going out and acquiring this property, which was a big hole in the matrix of what they had protected.

- There's lots of opportunities in our part of Southern Ontario, and I think along the Shield edge in general where there are these orphaned Crown Lands. There are sometimes fairly substantial areas and sometimes smaller areas of Crown Lands which are ecologically significant. The ministries don't have the manpower or the motivation to manage them. They just kind of leave them alone. I think there's opportunities there for some joint management structure.
- One of the things Couchiching Conservancy has been doing, and I know some of the others like NCC and Kawartha Land Trust have been as well, is working together with some First Nations. We need to be looking at ways to create partnerships there, encourage more engagement from their point of view and drawing on their wisdom in land management. In some areas, I think, it makes eminent good sense for the lands to end up as something like Indigenous Protected Conserved Areas which they've been using in the far north a fair bit. They have not yet been used as a conservation option in this part of Ontario. But they could be; there are some great possibilities in this area. And I think the land trust community could play an important role in making that happen.
- There is way more interest within the Indigenous communities now than there ever has been in terms of saying, let's structure these things so that we can serve the basic ecological values but still have hunting and trapping by native peoples. In most cases that's not a huge impediment towards maintaining the ecological quality. I think there are some great possibilities for expanding some of those areas where there's interest, at least at the federal level, not so much of the provincial level yet, but trying to use our community base of support as a way of saying, okay, let's help this kind of mechanism work where it's appropriate.

What steps do you feel still need to be taken to ensure conservation success?

- I guess the other one I've already mentioned would be these orphaned Crown Lands, which the Doug Fords of the world just say we can sell those off and there's a way to produce some income. But in many cases, they do have significant ecological value and so you don't want to lose all that. So we need to be persuading the politicians that there's a different way of looking at this.
- The other thing I would say is that there seems to always be, more and more, a need for collaboration. Especially in Canada. Much more so than in the U.S for example, where

that's not how they work, but collaboration here in Canada, for example, with the agricultural community could be very beneficial. There is some of that going on with the Ontario Farmland Trust and the ALUS program, but I think there could be a lot more. There's definitely some potential within the farm community in terms of what kinds of things can we do that are going to help to restore the natural ecosystem without driving farmers into bankruptcy.

- We've been finding in our area that the Ontario Parks management groups, because the way they're structured now each group sort of manages four or five different parks from one office, are a good place for collaboration. We've had very good relationships with them. They are happy to sit down, chat about things, look for ways that we might be able to work together. On the Ron Reid Nature Reserve, there is a little area that the previous owners had been using as a weekend place. We disposed of the residential building, but still have a couple of those big metal shipping containers with a roof over the top of them and they're very secure. So we have loaned those out to the local parks people because they needed somewhere up in that area to store their equipment, their ATVs and so on. In return their staff keep an eye on our lands. If they see something that's gone awry, they'll either deal with themselves or call us. We've given them the authority that if they see somebody trespassing, damage or whatever, just go ahead file charges on our behalf. So there's those kinds of things at the local level that can work very well.
- Beyond that, I think just carrying on with what we're doing is a good strategy. I think we've achieved a lot in 20 years and I don't think we've hit any huge sticking points where we have to fundamentally readjust. I think what we need to do is keep on going.

What has been the biggest challenge(s) you've faced personally or as part of an organization, pertaining to land securement?

- Certainly, one of the things that has become more and more of a challenge is the rising price of real estate because it doesn't just happen in the cities. It has a spillover effect in the countryside as well. Lands that we used to be able to purchase quite cheaply are now not cheap anymore. So that's definitely a challenge. I personally think that prices will probably come down to some extent, because the way they are right now is unsustainable.
- Related to that, one of the challenges that we're seeing in our area is the amount of land which is being bought by urban people purely on a speculative basis. Generally they have no interest in nature to a large extent. When we approach them to talk even about an outright purchase, they want the sky in terms of what they think the value of the land is. Of course we can't pay more than an independent appraised value, and that's as it should be. So sometimes it just means you're stuck. I don't think that challenge is going to go away, actually. I think that's it's probably going to continue to be there for quite a while and probably way more than other parts of Southern Ontario than in North Simcoe, where we operate. But we're certainly feeling it.
- I don't quite know how to get at this one, but that when I look at the land trusts that have been successful and those that sort of sit there and nothing happens, it seems to

me that it's very much related to one or two people on the board who are the spark plugs, who are the people who really want to make things happen. When you come up against difficulties, instead of just throwing your hands up, you go, well, how do we get around this one, or how do we deal with it? Often, it's related to the composition of the board and getting the best people on the board, the people who are who are the doers that make things go. That can be a difficult circle because if you're not being successful, you can't attract those kinds of people on your board. People are attracted by success, so you do need a few of those people. It doesn't need to be the whole board, as long as it's people who can bring the rest of the board along with them if they need to, or help the rest of the board to become more gung ho.

What advice would you give to the younger generation interested in joining the land trust movement?

- My general advice to younger people would be go for it, if you're interested and you can bring something to the table. Go and talk to your local land trust. You might find that you're quite welcome.

What are ways people can get involved in the movement?

- The Couchiching Conservancy for example, has about 400 volunteers that are involved in a whole range of different kinds of things. One of the programs that's been quite successful recently is we have volunteers who do a whole series of monitoring on the properties that we own. So, we have teams of people who are specialists going out and monitoring. For example, we have teams that go out and do bat monitoring because you can get these little sonar reader devices on an iPad that can identify the bats by the pattern of the sonar. And a lot of those programs when you look at them, a lot of them are full. That's one place where as an organization we would look for people that could be on our board or, you know, involved in some more substantive way.
- If you're a young person and you have the opportunity to go and work for summers with the land trust, I think most land trusts hire some students. And I think like everybody else, we're finding it more difficult in some ways to find young people who are interested, keen. But that's a very good way to get started because it gives you kind of hands on experience of what's involved and some of the challenges and so on.

What is the biggest challenge in managing land owned by your organization?

- People and their dogs. One of the challenges for land trusts is the extent to which we provide public access to our properties. So, for example the Couchiching Conservancy has some properties with extensive public access, a whole network of trails and bridges, and heavy public use. I was somewhat facetious about 'people and their dogs'. The rules are clearly posted: your dog should be on a leash; if it poops you pick up after them. It's amazing the number of people who think, well, yeah, but that doesn't really apply to me.

- We do have some other properties where access is discouraged. One property has rare orchids so it's not the sort of property that you would want to walk into unless you are a really dedicated naturalist. We don't even put a sign on it because we're trying to protect the orchids. That sort of balance is always tricky. When we talk to local municipalities for the most part, they want trails there. They want public access, for people to be able to go in there. It fits within their recreation masterplan thinking. So there's a bit of a push from that side in terms of more public access. There's a bit of a push from Environment Canada and certainly some within the Naturalist Community to say less public access so that can be a real challenge.

What method of land securement has led to the most success within your organization?

- I was going to say land donation, but I think in recent years it's been land purchase or a land purchase with the donation from the landowner and often from some of the government programs. You still have to go and raise the remainder, but that's worked really well for some and gets a lot of support from our members. That's what they think we should be doing.
- Land donations are great if they're in the right place. But if it's a little piece of land in the middle of nowhere or the middle of a subdivision, from our perspective it can be just an ongoing headache to maintain and look after. In the last few years we've established this corridors campaign. We have five major corridors within our working area. Some that are much more active than others. But if somebody approaches us and says they have this piece of land they would like to donate, one of the first things we at is if it's in one of our corridors. If it's not, the donation may still be possible, but it's going to be tougher to persuade us that we should take it.
- I think virtually all land trusts at some point will look back and there's one or two of the properties received early on where you ponder what were you thinking? We have some within the city that are really surrounded by subdivisions and it's just an ongoing management headache in a sense.

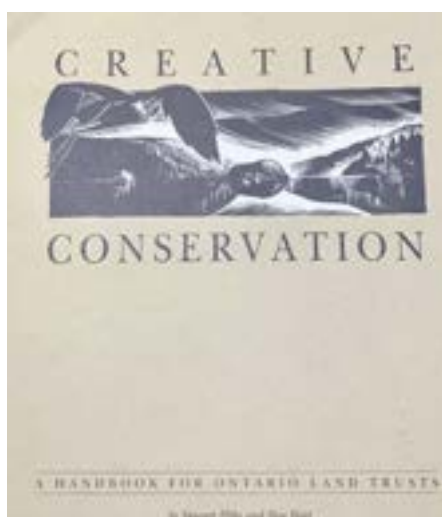
What do you remember about the early days of OLTA, or what was known as Ontario Nature Trust Alliance (ONTA) before 2002, and what role (if any) did you play in OLTA's work over the years?

- When the Ontario Nature Trust Alliance was formed, I was working with Ontario Nature (FON at the time) and we could really see the growing need for a provincial organization. Initially, it was just a matter of pulling together a bunch of the people who were involved in land trust organizations all the way from NCC down to the local or regional organizations. Especially bringing together some of those spark plugs to work our way through how this organization should be structured. How do you elect the board members? What role should ONTA play? How should it be funded? All of those kinds of nitty gritty sorts of things and particularly what do we need it to be doing in its early stages.

- For the first year or so, I chaired the group and FON provided logistical support and some limited financial support. Then there was a push particularly from some of the regional land trusts, that it should be its own organization, it should manage its own affairs and not have to rely on FON. So as part of that transition, I stepped down and Stew Hilts took over as the initial chair of the Ontario Land Trust Alliance. I was still on the board for several years after that. So that my involvement in terms of the early days, but I was just one of a number of people who were saying this is something that's important to create and let's make it go.
- Shortly after OLTA was created and again some years after that, there have been pushes to create a national land trust organization for Canada, Canada Land Trust Alliance, I guess, or whatever. Which has proved to be very difficult; you have people from Alberta and people from Quebec in the same room trying to agree on how everything should be done. Actually, I haven't seen that as being nearly as important as the provincial organizations. I think the provincial organizations are better able to address some of the challenges and some of the issues in their jurisdictions.

Do you have any insight into what OLTA's/ONTA's role has been in the land conservation movement in the past 20+ years?

- Well, actually, I think they've had a fair amount of involvement and influence to a certain extent. You have to look at an organizational landscape where conservation authorities are really having a challenging time, getting hacked to pieces by the provincial government, and they have been gradually diminished in terms of their role. When it comes to things like land acquisition, most Conservation Authorities now just say, well, we have no money, period, and so we really don't do any.
- So you kind of have that on the one side. And on the other side you have the land trust movement which continues to grow and become more active. Some of the organizations which lingered for the first half dozen years have all of a sudden caught on fire and they're doing all kinds of things. I think that has to say something about what OLTA is doing because we're going up and some other organizations that should be involved are going down.



3.2.9. Frank Shaw Biography and Interview



Frank Shaw graduated with a Bachelor of Science in Honours Biology and Chemistry as a gold medalist from the University of Western Ontario in 1967. Frank has over 50 years of professional experience in resources management, water conservation, parks operation, land use planning, heritage tourism, customer services and program development. He has served as a senior executive manager with

several Ontario government ministries, local conservation authorities and public agencies including Natural Resources, Environment, Tourism, Municipal Affairs, Hamilton Region Conservation Authority, St. Lawrence Parks Commission (SLPC) and the Niagara Escarpment Commission (NEC). Since retirement in 2000, Frank has been an active contributor in grass roots, citizen-based groups & initiatives that support more conservation & stewardship actions for the Oak Ridges Moraine and other Greenbelts to promote long term ecological health, wise stewardship of land & water and vibrant, sustainable communities. He has served as a Board Member, Land & Stewardship Chair, Governance Chair, Planning & Partnership Chair, Board Secretary and Vice-President for Oak Ridges Moraine Land Trust. Frank also sits on the Board of the Ontario Farmland Trust, where he has been Board Secretary, Governance Chair and on the Land Committee. In 2015, Frank was elected to the Board of Governors for the Ontario Land Trust Alliance and he continues to contribute as their Board Development & Governance Chair to growing professional standards, policies, practices and pursuing excellence for Ontario's land trusts. Frank is a proud co-owner of the Shaw Family double century heritage farm (since 1794) in Norfolk County and of a managed Niagara Escarpment Forest in Bruce County. He also resides in York Region (Town of Aurora) within the Ontario Greenbelt with his wife Susan. The Shaw Family enjoys their rural properties and the benefits of stewardship. Through personal & community action, Frank aims to support a healthy land, food, nature & water legacy for current & future generations of Ontario.

When did you first get involved with the land trust movement? (When did you first become interested in preserving natural lands or becoming a part of the land trust movement? Why? Year?)

- Hard to answer in terms of the very start. Probably in my youth first learning from my parents how to look after nature (gardens & livestock) on the farm, then studying biology at university and then working summers in this field for government in 1965 as a student and being hired as Resource Manager by the CA Branch in 1969. I first became interested in land trusts as part on my involvement in the Natural Heritage League (NHL) in 1983 and then officially when I became a Committee member and joined the ORMLT Board in 2001.

- Always interested in how to incorporate the private sector in land stewardship because I spent most of my executive manager career with conservation authorities or the Ministry of Natural Resources, at one point being Director of Crown Land Management Branch for Ontario in addition to being the Director of Operations for the Hamilton Conservation Authority, later the Executive Director for the Niagara Escarpment Commission (twice) and the General Manager for the St. Lawrence Parks Commission. Over this 35 year career, I was always interested in how to create nature reserves or have agreements with private owners to achieve land conservation goals.
- When I became Executive Director (ED) for Niagara Escarpment Commission (NEC) in 1983, it was just less than one year after, the NHL was formed. My predecessor ED for the Niagara Escarpment, Ron Vrancart (later on Deputy Minister of Natural Resources), previous to working for Niagara Escarpment was the Director of Parks in Ontario. He and other personnel in the Ontario Heritage Foundation (OHF now OHT) as well as Ron Reid, Stew Hillts, John Lounds and Mac Kirk convinced OHF and MNR to create the Natural Heritage League to get 20 or more ENGOs together in December and get more done in natural heritage protection. OHF at the time had mandate for both Natural and Cultural Heritage, wasn't doing well in natural heritage department. They figured they should get together (made sense for funding as well) to complete what no one could do alone. Later on, in 1988 through research by Ron Reid for the NHL discovered the Land Trust Model and Land Trust Alliance in US and wanted to bring the land trust movement to Ontario since this went well beyond the NHL coalition and could be even more successfully.
- In 1983, when I became Executive Director for the NEC, it was a founding member of part of the NHL, so I became the NEC representative on their Coordinating Committee. Later on I was Vice Chair and Acting Chair.
- Over the years, I was very active, at one point between 1985-1988, Russ Powell chaired the Coordinating Committee but due to his busy schedule, I was often Acting Chair for the Committee working weekly with the original secretary, Bill Sargent, and then the second secretary, Bryan Howard. Both were seconded from MNR and their NHL budget and salaries paid for by the OHF. NHL had a full time coordinator and office secretariat. All the rest were volunteers, working with other ENGOs or departments as staff or volunteers or university researchers. This enabled increased results because someone could take discussion from meetings about a nature scurement or protection project and make something happen by finding some money and an organization to implement action.
- 1983 is when I officially started with NHL (even though NHL had started for different reasons, it spawned the land trust movement), and this was where I first came in touch with the incredible potential of the Land Trusts. And out of the NHL research report by Ron Reid in June 1988, and dogged persistence of a few stalwarts came the Ontario Nature Alliance (ONTA) first in June 1997 with 14 members. The movement grew quickly to 23 members and finally the Ontario Land Trust Alliance (OLTA) was created with its inaugural meeting in Nov 2001 and official not for profit incorporation in July 2002.

What changes in policy (in your opinion) have had the greatest impact on the land trust movement (either negatively or positively)?

- Firstly, the biggest change in policy that made all the difference, otherwise a land trust would not be able to hold an easement, unless it owned adjacent property, was convincing the Peterson Government through the Chair of Ontario Heritage Foundation (who happened to be Terk Bayly, a former Deputy Minister for Natural Resources and Cabinet Officer) to pass the *Conservation Land Act*. He promised it first to the Conservation Council in 1986 and it was enacted in June 1988 and improved several times into 1990s to increase scope for conservation easements including agricultural land, water supply and wildlife habitat as well as government funding. Without this Act, no not for profit agency or charity other than the OHF, a municipality, the federal or provincial government can directly hold a conservation easement on private land unless they own the adjacent property. Now land trusts can hold and register conservation easements anywhere in Ontario and qualify for Eco-Gifts tax receipting, which is a high level donor incentive for private land donations of conservation easements or full title land securement of environmentally significant nature reserves.
- The *Conservation Land Act* now allowed a conservation body to be defined and named via provincial regulations, such as a land trust (body had to be a registered non-profit or charity to get government funding approvals), allowing for easements on private lands and financial support for projects.
- Up until then any land trust or equivalent not for profit body (ie FON now Ontario Nature) would have to conserve land as a nature reserve by holding the title, by buying it or by a donation or by an unregistered agreement.
- The advantage of a registered easement is that it is registered on title, and protects the land forever as it changes ownership. This conservation forever on private lands is registered on the land title, that cannot be expunged.
- Secondly, in the *Conservation Land Act*, the government recognized that conservation bodies would do work under the act and that the government could provide a grant, aiding local clubs and land trusts to acquire properties or easements for purposes of protection. They also could provide tax relief, such as that provided under the *Woodlands Improvement Act*. If the land securement was registered as Conservation Land as defined under the *Conservation Land Act*, municipal property tax was reduced.
- Bryan Howard and I get a 75% municipal property tax reduction on the land we jointly own on the Bruce Peninsula, because it is a managed forest. It's like printing money for conservation; a more attainable incentive for local groups or private owners with limited incomes. For example, land trusts can save land under an easement, and issue a tax receipt to the donor (donation receipt is 100% over 10 years, if it is appraised and qualified under Canada Ecological Gifts Program). This was terrific and how the federal and provincial governments empowered land trusts through funding grants, policy efforts and conservation incentives to go further in grass roots conservation.

- When the government recognized conservation bodies under the Act, it enabled land trusts to grow in contributing to more to grass roots conservation anctio in Ontario. Land Trusts in Ontario resulted from 1988 discoveries in NHL research, that started in Ontario with the creation of ONTA and then incorporated as the OLTA provincial organization to promote, educate, help and support the land trusts across Ontario work together in a professional way with acceptd standards, practices, ethics and credibility). Incorporating the provincial alliance created OLTA leadeship for lall land trusts.
- Thirdly, because of this Act and the efforts of Ontario Land Trusts and their partners in land stewardship, this provided a stronger mechanism for long term protection either on private land or as a nature reserve in which title was held. Long term protection achieves both local goals and provincial goals.
- This is similar to what happened under the *Conservation Authorities Act* when passed in 1946. The government invests by providing policies and grants to get more done as a conservation partnership, but the authorities do the groundwork with their member municipalities and created a provincial alliance, to coordinate advocacy, education and delivery of conservation programs through generally accepted professional standards.
- In the *Conservation Land Act*, Land Trusts can get going as an active force in community conservation, form a provincial alliance, lobby for programs and funding from governments at all levels as well as promote more collaboration between the government, funders, landowners and organizations.
- Lesson in conservation: There are three basic principles under the CA Act and the *Conservation Land Act*. 1. Local initiative e.g. land trusts or conservation authorities. 2. Natural or watershed biological areas as the scientific base for creating consevation projects or nature reserves to save, protect and increase envonmetal health or biodiversity (instead of losing it to urban sprawl). 3. Cost sharing amongst all parties that benefit from conservation action.
- Due to this terrific synergy, there are land trusts and conservation authorities operating in the same area (e.g. Oak Ridges Moraine Land Trust and Toronto Region Conservation and Lake Simcoe CA) have been doing many projects together because more gets done when more folks are involved.

In your opinion, what is the most effective method for land securement (for landowner AND land trust organization)?

- Whatever the land owner and the land trust can agree to that provides at least short term but ideally long term land, nature and water protection registered on the land title is always good for more conservation success.
- How this can happen is in many ways since every property is unique, every land trust is unique, and every private donor/seller is unique.
- Several mechanisms used to find most effective method for a property
 - #1: Short term agreements. Such as those under the Woodlands Improvement Act or short term leases/ rentals/ management agreements/ Alternative Land

Use Services (ALUS). They sign up something for 5-10 years or less and agree with the landowner that something important in land conservation will be achieved.

- #2: Better tool for something over a longer term is a Conservation Easement. Landowner still owns land but the conservation body holds registered easement describing certain things that will happen and not happen such as this is not going to be an aggregate pit or subdivision, and this is going to accomplish something in nature e.g. save the farm, swamp, forest, wildlife habitat, protect water, etc. One item added to *Conservation Land Act* by 1990 was saving farmland. Now farmland conservation easements can be held, saving agriculture as well as nature. Under the *Ontario Trails Act*, trails can also be saved. Farming, nature, water, biodiversity, species at risk, all these things are legitimate ventures under the *Conservation Land Act* and these are all things that qualify under Ecological Gifts Canada. If a donation is processed as an easement or fee-simple under Eco-Gifts, a tax receipt can be released for 100% of the gift value instead of the approximate 25% or so eligible deduction amount under receipts not registered as Eco-Gifts. If you can offer an income tax credit of 100% spread over 10 years not the usual smaller or typical charitable tax deduction this is a large incentive that compensates for small ENGO budgets. If you are a small group with mostly volunteers, with little staff, with some trouble raising money, being able to release a tax receipt for 100% of the value of a easement that was just donated is like printing money for the acquisition of protected lands.
- #3: If a landowner is interested, particularly after there has been an easement but they are now writing their will, they may give or sell the property as a bargain legacy to a land trust, and now the trust owns this land. It's now a fully owned land trust nature reserve protected forever and it is being managed for this purpose. If it is a highly significant - hands off - no trespass property, there is better chance of protecting the key values with a fee simple legacy or gift.
- #4: There are other forms of protecting land e.g property leases, management agreements, stewardship grants, property tax credits for protection, etc. but conservation easements and fee-simple reserve ownership are the most common models that land trusts are using. These can occur by legacy, donation, bargain sale, or market sale. If it is an easement you only acquire (own) a small portion of the bundle of rights. Fee simple means you own 100% of the bundle.
- #5: However, the most effective method is not just about the tool, but which tool works for the situation by providing protection that the land owner and the land trust can determine is most agreeable.
- It probably took a long time (a whole career) for me to fully realize the benefits of volunteer-driven, community-based conservation action. Since then I have been

working as a volunteer professional with land trusts for 19 years. When I retired from the OPS in 2000, I joined the Oak Ridges Moraine Land Trust and I have been with them and the Ontario Farmland Trust ever since and more recently from late 2015, on the Board of Governors for the Ontario Land Trust Alliance (OLTA). During this time as a policy writer and governance chair, I have devoted my volunteer time to developing land securement, stewardship, financial and governance policies and procedures within the generally accepted and prescribed standards and practices, helping local trusts create their business strategies. Local trusts have variable capacity and scope, but they are still accountable and responsible to work within OLTA membership policy, CLT Standards and Practices, and CRA guidance for a registered charity. OLTA helps all Ontario land trusts find their way forward with professional credibility and this attracts donors and funders.

What has been your most fulfilling experience working in land trust conservation?

a. More specifically, land securement?

- It is rewarding to see ecologically significant properties secured, stewarded, and easements monitored annually with the land owner to ensure the values or reasons for which the land was saved are being fulfilled or improved.
- As a steward, you want to leave the property in better shape than when it was acquired certainly not worse. That is most fulfilling in terms of properties.
- Another most fulfilling experience comes from being on the boards of OFT, ORMLT and OLTA as a committee chair, governance chair, land chair, and/or board secretary for all three organisations as well as being a member or volunteer with three other land trusts (Long Point, Escarpment Conservancy and Ontario Nature). To see these boards work democratically to develop policies and procedures that illustrate good governance, effective programs and best practices inside the land trust umbrella of accepted standards has been a most fulfilling experience. As a land trust protection team we are only as strong as all of our combined talents or our weakest link.
- If any of the core funders of any land trust in Ontario, the Canada Revenue Agency, the Government of Ontario, or our land donors start to think the Trust business isn't being run well (ie. stewardship forever is not being carried out, we are in trouble. Risk management control is better when we follow best practices, and learn by teaching each other. By growing and working together etc, the more successful this movement will be long term and that is what OLTA is all about - helping members grow excellence in best practices. By doing this, we gain support from donors, governments and partners.
- Third as most fulfilling: I was lucky in my career, with wonderful mentors. Started early working for guys like Art Latornell, Chairs and Committees, boards of conservation authorities, brilliant general managers, Deputy Ministers and ADMs in the OPS and other leaders. I learned by watching and working with these mentors. My executive career success wouldn't have been the same without the opportunity to work in community conservation with these outstanding people who lifted me

up. I am giving back, up to 500 volunteer hours per year since I retired in 2000 to pay it forward.

How have you seen the land trust movement evolve over time? (i.e. securement methods, formation of land trusts, etc.)

b. What are some other milestones (periods/ eras) that you've seen emerge within the land trust movement?

From Frank's introduction:

- Natural Heritage League (NHL) started in December 1982 to get people together who were working on conservation, both government and non government (ENGOS) with the Ontario Heritage Foundation and the Ministry of Natural Resources to get more done. During this work, we started looking at how to get more conservation done with privately owned land and discovered land trusts in the USA.
- In 1986-87, started to realize that where jurisdictions had land trusts, there was more getting done. This prompted the report written by Ron Reid in 1988 funded by Lyn McMillian, that went to the OHF, MNR and NHL who agreed that it was time to "Bring Trust to Ontario" (the title of Reid's report). The land trust germination idea started within the NHL network, eventually became the new ONTA in 1997 and then OLTA in 2001 – now with over 50+ members, associates, partners and supporters spread across Ontario.
- Resources include books and reports written by Ron Reid and Stew Hilts.
- Three key conferences and gatherings follow evolution of the movement, starting with the Natural Heritage league all the way to land trusts. The first conference was sponsored by MNR and the OHF in November of 1982. Other key players include Stew Hilts, who at the time was working at the Centre for Lands and Waters in Guelph as a professor. They thought that we could do more so they had this conference, which resulted in the formation of the Natural Heritage League (NHL) in December 1982, and later on discovered land trusts as a structure that should be implemented in Ontario.
- In June 1987 Ron Reid did his report on Bringing Trust To Ontario and in the same month the *Conservation Land Act* became Ontario law.
- In 1994 the first ever Land Trust Gathering occurred, sponsored by the FON, NCC and supported by several government agencies including MNR and OHF. Barb Heidenreich, Bryan Howard, Ron Reid, Ian Attridge, Frank Shaw and the OLTA Office in Toronto have many of the key reports.
- At that point, land trusts in Ontario were becoming more popular but no land trust provincial organization showed up until the middle of 1997.
- In 1997 another conference sponsored by Ontario Nature (Federation of Ontario Naturalists - FON at the time) and Nature Conservancy of Canada (NCC) when John Lounds, currently the President/CEO for the NCC, was employed as Executive Director at the FON. As a result of dialogue and advocacy by Stew Hilts, Ron Reid, and others this conference spawned an Ontario Nature Trust Alliance (ONTA) under the wings of the FON.

- By 1997, there were 12 to 14 active or registered land trusts/ charities and FON decided to create the original alliance. By mid 2001, it was decided to fully incorporate as the Ontario Land Trust Alliance (OLTA Inc.). Letters patent for OLTA were approved on July 02, 2002. That day, OLTA has become the official provincial association for the Ontario land trust movement.
- Ontario Nature is one of the biggest and significant members in the OLTA. OLTA has approximately 36 land trusts registered as voting members and 14 associates or partners across Ontario as part of the OLTA network.
- In 2002, The OLTA 'Standards and Practices' (S&Ps) were introduced, and then we franchised the United States Standards and Practices for Canada. OLTA and then the Canadian Land Trust Alliance (CLTA), used the US system as a basic foundation but modified the S&Ps to fit Canadian Laws and CRA Guidance. These were updated in 2005 and 2007 and recently revised in Jan 2019. It is of remarkable significance, that the ONTA, and now OLTA, which is the official provincial organization for the land trust movement for Ontario, grew out of the discovery and promotional efforts of the NHL, the broad power of the *Conservation Land Act*, and the adoption of Standards & Practices.
- When starting with the NHL, we were busy finding ways to work together. No one could save a property by themselves. Volunteer resources in the 20 or more members of the old NHL included individuals who were in the FON, NCC, MNR, OHF, NEC, Habitat Canada, CAs or University of Guelph.
- Working together helped get more stuff done. Part of it was money available with the OHF who wanted to focus more on getting things done through the Natural Heritage League. As they started collaborating, the NHL and its members learned more about land owner contact and conservation on private land by studying other successes. This led to a number of reports/documents (Islands of Green, Creative Conservation Bringing Trust to Ontario).
- It was realized there was a wide variety of securement tools that needed to be explored for more action, particularly easements, land owner contact, and conservation that could be done on private lands with registered agreements. Hence, the conservation easement as a new protection tool became a strong pioneering focus for many environmental groups across Ontario.
- Between 1987 and 1997, the *Conservation Land Act* was passed, Ron's Report was presented and efforts in FON were germinating towards an Ontario Nature Trust Alliance in 1997. And by 2001 just before OLTA was formed, we discovered the Land Trust Alliance of the United States, which already had an excellent set of Standards & Practices. All this led us to where we are today. From 2001 when ONTA evolved into OLTA, to 2019 we have been working hard to build stronger land trusts in Ontario.
- OLTA also promotes and helps new land trusts get started, looks for available funding sources, and teaches standards and practices, together with finding more ways to tap into programs such as EcoGifts, or the Ontario Land Trust Assistance Program as well as spreading the word that land trusts are a good approach to community conservation throughout Ontario.

- Evolution since 2002 (incorporation of OLTA) has been to grow excellence, promote the model, make the land trust movement stronger, and hopefully recognized well enough with the credible land portfolios we have grown that governments and donors of all levels will invest more in Ontario land Trusts. This is the only way to succeed in Ontario, with far more done by charities and volunteers in communities of conservation with less investment than any one agency, particularly the government, can ever do on its own.

What direction would you like to see the movement go in? (In what ways would you like to see the land trust movement evolve going forward?)

- I want to see full implementation of our standards and practices, through education and training and promotion and outreach for land trusts, through marketing of the whole movement and its benefits to get stronger.
- One of the ways we can build that strength is by growing our excellence in educating and accrediting land trusts, either under Imagine Canada or some other certification so that we have some sort of seal of approval.
- What I'm saying is, if you have a license as a chartered accountant, I might let you do prepare my income tax return and the CRA might believe that my income tax statement is truthful and properly done. If my land trust is now accredited or certified and has a strong track record of nature protection and stewardship forever in its land portfolio, this will build credibility.
- If we depend on supporters, donors, partners, foundations, government policy, etc., to be successful, the more that we show that we've gone beyond a 'good idea', and good passion, to demonstrate that we also have good governance, practices, staffing and volunteers to make this happen.
- Conservation is often driven by volunteers - none of us are paid (we do have some staff, but the board of governors are not paid) - so land trusts have very low overhead in carrying out community conservation. However, even though most of our team are volunteers, because we're a charity, we know we have to run a good business with good practices to succeed.
- You can count on us when we say "we will protect this land forever", whether you're a land owner who we got the land from, whether you're the person who helped give us some money to make it happen, or whether you're our government partner who's prepared to give us a grant or let us give 100% tax receipt credits. So, we can all be winners if we work hard in taking this seriously forward to a higher level of 'accreditation' or 'recognition'.
- I call it accreditation but certification is really just another form of recognition that says "these guys are running a good business, you can count on them, they have good management practices, and they do look after this land forever, you don't have to worry once they take on a project". - That's where we need to go for sustainability.
- Right now, we're still selling uphill and we could do 5x what we're doing now if we could find more money and resources for land trusts in Ontario.

- For example, the Ontario Ministry of Natural Resources (MNR) has not put money in the Ontario Land Trust Assistance Program (OLTAP) for about 4 or 5 years, which helped us get started under the *Conservation Land Act*.
- Fortunately, Environment Canada through the Ecological Gifts Program, is investing in the Ontario Land Trust Assistance Program. So, we're able to pass on some of those grants to our members because OLTA also helps administer grant programs. We also teach our members what they have to do to apply, how to secure & steward land and maintain high credibility.
- The more we can build, learn and share in excellence for the land trust movement as a whole, and individually, the better it will get. .

What steps do you feel still need to be taken to ensure land trust conservation success?

- Addressed throughout the interview.
- People like Alison Howson, the Executive Director for the Ontario Land Trust Alliance (OLTA) and Kristie Virgoe, OLTA Chair can offer more ideas that are on the leading edge of our strategic directions. Alison knows what we're doing now, for research into accreditation for example. She can tell you that there are some improvements that we'd like to see to the *Conservation Land Act* that might make the policy framework a bit more enabling with more land trust program funding and help us meet Ontario's 17% diversity targets.
- Every piece of legislation can improve over time, and that's based on our experience. We've had this piece of legislation around for around 25 years and we have ideas for how we can improve the *Conservation Land Act*, and how we can pursue excellence, both in S&Ps training (education) and in recognition so that we can have that seal of approval (accreditation).
- Whether or not this is done through Imagine Canada, or not is our current research. We're interested in the Imagine Canada model because it has strong credibility in all of Canada, not just Ontario. OLTA has seen the program in the U.S., but it's American. We're trying to figure out what's the best way for us to have a certification/recognition program in Canada.
- We're now working through the Imagine Canada model, just for the OLTA not all of the land trusts, because we are a separate registered charity as well as a provincial alliance. When OLTA becomes fully certified, we may know how to extend this accreditation or recognition to our land trust members.
- We're investigating that now and finding stuff that we could improve in our governance policies such as risk management, succession planning, and whistleblower protection, as a few examples - none are hard to do.

Are there any influences from your childhood that motivated you to be involved in land conservation and now stand out? (memories/ people/ books etc.)

- I grew up on a farm. I'm a sixth generation UEL coming from the USA after the War of Independence. Our Shaw family has owned the farm and my brother and I still own it, since 1794 when we came up from New York and New Jersey. Now, it's only a

small portion of the original 800 acre holdings, but that doesn't matter, it is my ancestral home and top quality farmland producing 200 bushels of corn per acre under careful stewardship and farming practice – our family legacy continues...

- My parents were good stewards of the land and nature. My dad always took very good care of the soil, he was always worried about erosion and cared for all of the livestock. He kept as much of the forest as he could that we didn't need to turn into agriculture. We built all the buildings on the property from our small woodlot. If he [my dad] had gone onto school, he should have been a veterinarian because I never met a man who was kinder to all of the animals that he had on the farm, whether they were cats or cows or in his personal care of the land.
- My mother was the same in terms of growing food gardens, looking after flower beds, in serving on local horticulture and naturalist societies and so there was all of this stewardship going on around me and my brother, all the time, every day.
- Both of my parents were active in the community, my mother more so. She helped start the Long Point Bird Observatory, now known as Bird Studies Canada, the local chapter of the Ontario Womens Institute, the Norfolk Field Naturalists, the Norfolk Horticultural Society, the Geological Society of Norfolk, etc. She was a genealogist, registered nurse, teacher and professional with the Childrens Aid Society. She was also very active in the United Church community, the Ladies Aid Society, and a long time volunter in the auxillary group for the Norfolk County Hospital.
- I always got the clear impression, though my parents never told me directly, except by example, that one should always give back to their community.
- What did I learn in my career? On the topic of mentors. I wouldn't have gotten half as far in my career without all of these people who taught me, hands on or by example, about why conservation is important and how to be an executive manager.
- Why I felt conservation is important - because I grew up in it at the farm and studied it. I'm a graduate biologist with an honours degree and I worked for both conservation authorities and the MNR, so I have spent my whole life in conservation.
- I'm an avid reader and I've enrolled in scads of one-day seminars or workshops on everything that managers, leaders, trainers and governors should use, learn, know or practice to get along well with people or be effective in leadership. That doesn't mean I am perfect, but I can see how collaboaration is a preferred pathway to gold.
- My current passion is learning even more about leadership, teamwork, governance, partnerships, and *people*. It doesn't matter what we do in life, it isn't going to get done unless people can work with people. Whether you're a manager or worker, a volunteer or paid professional, you need to learn the most you can about how to get along with people. Otherwise, you won't get much of anything done well.
- When I was in University at Western, I was in honours biology & chemistry and other than selecting which botany or zoology I wanted to take, I only got one elective per year but I took psychology 101, business administration 101, sociology 101, and all of these helped me to see it is very important to get along with people.
- Why aren't these courses a part of every curriculum in our choice of education or career or just something like-minded to do with getting along with people.

- We need more programs like the Young Conservation Professionals Leadership Program, (YCPLP) that Stew Hilts and Peter Mitchell started via University of Guelph – Centre for Land & Water Stewardship and naturally blossomed through the Natural Heritage League (NHL). It still continues today and I now understand it has been taken on by the Toronto and Region Conservation Authority (TRCA).
- If you look at the young Executive Directors of land trusts in Ontario and their staff, many of them are outstanding graduates from that YCPLP experience. We need more of that and more of what you're doing right now, what you're studying is the same kind of thing - how to harness conservation energy from different sectors, government, corporate, private, not-for-profit, etc. and how to learn best practices to accomplish more conservation at a time in the world when some of our leaders seem to have 'lost their minds' about the importance of saving the land we love

Did your education (formal/ informal) play a role in your involvement in the land trust movement?

- Completed degree in Biology at University of Western Ontario.
- During my work, studied biology but became an Executive Manager early at 27 years old - spent entire career as an executive in MNR and the OPS.
- Understood biology and conservation, but thought I should learn how to lead people, train people, mentor people, and encourage teamwork. Focused on using a win/win approach – most managers now call this model 'getting to yes'.
- I will give you one simple example of a lesson from a mentor: I was on my way to a meeting of council in the Town of Dundas, with the chair of a conservation authority, and we're trying to sell a project to them on water management, because the whole of Dundas is on a flood plain. On the way there I was filling his ears as a keen young manager about the right way to do stuff, and what we were gonna convince them of, and he just listened - he was the nicest guy in the world. When we got there in the parking lot he says "Well that's interesting Frank, you've got a lot of good ideas and I've got some too, in many ways these are all great ideas. But we need to learn while talking to them what their right ideas are, and then we need to learn how to blend our right ideas together. So when we come out of there, it'll be the right idea that we've all said yes to. It may not be mine, or yours, or theirs, but it will be ours. That's the right idea for us to find today". It worked so I have never forgot his advice.
- I was about 26 years old when this conversation took place, and it's stuck with me my whole life. It is not in Mr. Ford or Mr. Trump's tool kit.

What has been the biggest challenge(s) you've faced personally or as part of an organization, pertaining to land securement?

- c. *What is the biggest challenge in managing land owned by organisation(s) or agencies that you have been involved with?*

- Firstly, finding the resources, either staff or expert volunteers, or money, where I can hire some people, to actually engage in practical conversation with the owners of the conservation land that you'd like to acquire or work with them to protect. So by far, the usual biggest challenge for a volunteer group is to find resources, to accomplish their vision/mission/dream, be that saving farms, nature or wetlands, etc.
- Secondly, when you get started, try to learn the best practices. Once you've got the resources (volunteer or paid services), learn the tools, and get more experience. It's all trial and error and you'll learn from doing it. When your land trust has two or three or four properties you make sure you have policies & processes for the organization, that the board has approved, and says these are our best practices. Let's ensure we have a financial management policy, we have a risk management policy, we have a human resources policy, we have a land securement policy and practices and the same same for stewardship and monitoring. How do we deal with violations, what is our recruitment orientation and training for volunteers, board members and staff, so they are aware as they can possibly be, so they can carry out their tasks with a level of ability that we feel comfortable delegating tasks to them and can tell them what the game plan is (best practices; handbooks; record keeping, etc.). The land trust team is the board and the staff working together; the board is in charge of governance, the staff is in charge of operations, but they overlap and you have to understand each other. Governors who are experts can help in the operations, and staff with expertise can help you write governance policies. These are a quick overview of land trust group challenges, getting on the ground experience, and also making sure in your succession planning that you are translating experience into policies, that allow the next board and next staff to work well with the donors, with the landowners, with the funders and with the partners - everybody that is on your stakeholder list.

What method of land securement has led to the most success within organisation(s) or agencies that you have been involved with?

- Registered conservation easements and also owned nature reserves (fee simple) are the most common in use. I'll just use a couple of examples. The Oak Ridges Moraine Land Trust is about 2/3 easements and 1/3 fee simple for about 60 properties and I think they're up to 5,000 acres, all across the moraine. For the Ontario Farmland Trust, we don't want to own the farmland, if you want to give us your farm we'll put an easement on it and sell it and use the proceeds for more projects. Farmers know how to own and operate farms, land trusts do not. Our preferred tool - other than possibly one farm someday as an office location and demonstration site - we rely on conservation easement agreements (CEAs) as our principle tool for protection.
- Some other land trusts may look at shorter term agreements, such as a 3 to 5 year management contract or lease plan, to work with somebody else, and that's good but the protection or stewardship is not long term. However short term projects and agreements are one practical way to get started. What is most important is to find a

way to encourage stewardship on private lands with ecological significance in some kind of partnership deal with the landowner and then move on and up from there.

- I'll give you an example of program diversity that comes to mind. The Couchiching Conservancy has short term agreements with the NCC and are doing stewardship on properties that the NCC owns - that's a great conservation relationship, because they're both contributing skills with delivery efficiencies and fiscal economies .
- Here is another example of variable preference in use of conservation tools. The Long Point Basin Trust is not generally interested in conservation easements; they prefer to own their nature reserves and have sole control. They think easements are hard to control or manage, and that's fine with me. The tools that a land trust prefers to use is up to them. I may have a different view on use of conservation easements.
- I see easements as a way to get little biospheres of stewardship on private lands across Ontario that show how you or anyone could or should actually take care of the land, nature and water on your property. Land trusts don't have to actually own every property, because then more direct management comes along with ownership.
- Easements are a great opportunity to share in conservation and stewardship forever on private lands. The land trust and land owner are working in partnership to protect defined values in a registered conservation easement agreement. If I go back to the earlier question (which method of land securement has the most success?), it is the one that works best for the parties, that results in protection success.

What has been your career path (positions in public, private, or NGO) to date?

- All kinds of positions in a public career; General Manager of St. Lawrence Parks, Director of Operations for Hamilton Conservation Authority, MNR Director of Land Management, Acting MNR Regional Director & Executive Director for the NEC.
- For the NGOS, I've been Vice Chair, Land Chair, Board Secretary, and Governance Chair for ORMLT, the Farmland Trust, and now the OLTA, at various times.
- The most consistent thing was Governance Chair in three land trusts including the OLTA, OFT and ORMLT. As a land trust member and volunteer, I've been writing board handbooks, running training programs, and writing board policies for the governance and management of local land trusts and OLTA for 19 years.
- And what do you think a farm is? It's private land with agriculture, forest, wetlands, and nature. A farm is an example of the widest range of conservation enterprise in Ontario, in the rural landscape, more than any other business. Some people don't see farming as part of conservation but I do; it is private land stewardship.
- With another partner, I also own a managed forest on the Niagara Escarpment. Our professional forest management is private land stewardship. Under the *Conservation Land Act*, we get a property tax reduction due to our agreement to manage and steward the forest and its resources in line with good conservation values.

And in what ways would you say that your path has been helpful to you to date?

- I couldn't do well what I'm doing now as a volunteer, if I hadn't done all those things, either grew up with them at the farm, studied them at school, learned them from seminars, gained them at the school of "hard knocks" from my mentors, or from my work on conservation teams as a volunteer on boards or committees.
- All of those learnings and experiences reinforce each other and since I've done all of them now, I am finally getting a few things into a better perspective. Sometimes I do wonder, how I was able to accomplish so much so early in my career, when I knew so little, and this is because of the wonderful people I was associated with at home, in the community or at work. I was always watching my mentors and learning from their examples. They let me make mistakes and then I learned what not to do. They just let me make the mistakes and then would ask me casually what I learned from that so far. If I could answer that question well then I didn't get a lecture.

What is your future career path (positions in public, private, or NGO)?

- I became a grandparent, at 74 years old. First grandchild from my daughter. Future career path is looking after grandchildren and enjoying family life in the next ten years. I have another grandchild on the way from my son. I have a lot of friends who are kicking off at 85, so I'm thinking carefully about my next ten-year plan.
- My previous twenty-year plan had a lot of volunteerism with land trusts and a few other agencies. And I've been doing some volunteer consulting on governance and leadership because I used to teach customer service in my jobs before and teamwork etc. so I've been doing some of that mentorship. However, I think I may spend less time doing that and more time with my family particularly two grandchildren in the next ten years. That does not mean that I am any less interested in conservation by land trusts because I will probably still be a member and a donor, but I may decide to let somebody else freshen up the leadership, some new people to contribute more actively than me. Every organization should bring in fresh talent and keep working on succession planning for mission sustainability. If you stay too long, you might be counterproductive, when it's better to move on and do something else.

Who do you see as promising young leaders in this movement? (specific individuals - this question implies).

- There are some really interesting and vibrant people coming into the land trust movement who have been at workshops that I've been at recently or who are on the staff of some land trusts that I work with. And some who I know well have taken the Young Conservation Leadership Program. Or people like yourselves and what you are studying at Fleming that I think will become the new people contributing to the land trusts, community groups and environmental conservation in Ontario.
- Now I can think of a couple of examples, Kristie Virgoe has been the OLTA Chair, has worked for the ORMLT, Muskoka Conservancy, OLTA and now she's the Manager of

Land & Stewardship for the Kawartha CA. She is young and a graduate of the Young Conservation Leadership Program started by Hilts & Mitchell.

- So are people like Morgan Roblin who was working with the Escarpment Biosphere Conservancy and more recently is our species at risk coordinator for the OLTA. She is also a graduate of the YCLP along with Wendy Cooper and many others.
- There's people like April Wepler who now works for Fresh Water Futures, started out at the Toronto Conservation Region Conservation Authority, became the OLTA Chair and is still involved with Land Trusts as an associate and consultant.
- And there's a whole lot of other new young professionals who are either an executive director or on the staff of a local trust or conservation authority. Some of them are on staff at MNRF or MECP or Environment and Climate Change Canada.
- Laura Kucey who is the Ontario contact person for the Ecological Gifts Program is an incredible person and effective professional. So those are just a few quick names of youth that I can think of and that's how it all of started out for me too in Conservation Authorities as a young Resource Manager at 25. "Baptism under fire on the ground" with a local CA or a land trust that didn't have much in the way staff or budget was how we learn a lot very fast and as a result were able to contribute more later.
- I think you need a combination of some kind of degree in conservation, planning or science, and some practical on the ground experience or summer job that allows you to start to learn how things work and, in that regard, to question 18, my advice is learn how to work with people. Learn how people think. Understand teamwork.
- Throw away your personal ego as it just gets in the way of getting things done, drown it immediately, if you do a good job, people will know you are doing a good job, you don't need to tell them every day how good you are. So always keep win-win and getting to yes in mind. Think about what makes sectors tick so if you want to have donors, landowners, people, foundations, governments or sponsors wanting to give you money or land to help "What is of interest to them that you are doing?"
- So you have got to learn not only what makes people tick but also how to get people to work together and say yes and find a yes that appeals to all parties. Understand the motives or interests under their stated position. Compare your interests as just comparing positions gets you nowhere. You need to figure out well why would a foundation want to give you money e.g. what is their mission?. What do you want to do, and is there a connection between them and us. We don't to ask them for money that isn't part of our mission and they won't give us money that will not achieve their goals. Communication and collaboration with people is at the root of everything we do. If you can't get along with people, not much will happen in conservation.

What are ways people can get involved in the movement?

- You can do what you're doing, being part of a project/paper or study at school, if there is a course on land trusts or on land securement or stewardship. Learn about it at school or through seminars, there are seminars that you could go to everyday if you wanted to on the subject of land securement and stewardship.

- Volunteer, e.g go volunteer for land trust, and maybe get on their land securement or stewardship team or committee. See if you can get a summer job or cooperative project with them or with a CA, either paid or as a volunteer by reading their newsletters or checking into new opportunities on their websites.
- What I'm saying is get experience any way you can. If you have been taking courses and are studying something that's related to the work and you've been a volunteer and a summer job comes up maybe they will come to you first. Sign up and be a volunteer, be a donor or member and you'll get their newsletters.

What are your recommendations for future research on this topic?

- Get a look at Frank Shaw library and reports books that Brian Howard has.
- Read Islands of Green and Creative Conservation, by Hilts, Kirk and Reid.
- Read Options for Land Owners, a publication for the Niagara Escarpment but it was put out by the NHL through the Ontario Heritage Foundation (OHF) in 1990.
- When reading Creative Conservation - Handbook for Ontario Land Trusts 1993, it talks about the land trusts and how they can form, grow and be successful.
- Read proceedings of OLT Gathering of 1994 at Geneva Park in Orillia. Ian Attridge, Stew Hilts and Peter Mitchell wrote the proceedings in October '95. I do have a copy but I won't let go of it. That 1994 Gathering was one of the transitions before the 1997 Gathering that spawned the new ONTA to take over from the old NHL.
- Read the report called Bringing Trust to Ontario phase 1 by Ron Reid for the FON June 1988 and the resulting endorsements from OHF, MNR and NHL.
- I have seen the recommendation to the OHF and MNR but they decided after 1992 to cut their budgets and secondments of full time staff to the NHL. However, Hilts, Reid, Kirk, Lounds, Attridge and several more ENGO leaders didn't give up and they kept working through a committee of FON and had another land trust gathering in June of 1997. The 1997 Gathering was organized by the NCC and the FON and it was the signature event from which the Ontario Nature Trust Alliance was created.
- Read our original OLTA statement of land trust practices in 2002 that became the Canadian Land Trust S&Ps in 2005 and were just updated in January 2019.
- The *Conservation Land Act* goes beyond RSO 1990 and you should be reading it as in law & regulation today to appreciate all positive changes to increase scope.
- There was an interesting book published by Environment Canada 2005 titled Beyond Islands of Green - a primer for nature reserves using conservation science.
- Go to the OLTA office and interview Allison Houson and/or Phyllis Lee to find out everything you can learn about the OLTA and its current programs.
- If reminded, I can send you the bylaws for the OLTA, the current OLTA strategic plan and the table of contents for our board handbook that illustrates OLTA policies on its governance and how we are trying to orient and educate Board members.
- If you send me an email whenever you're looking for something else, I can send you things from my personal land trust records to fill in some gaps. There is more in the OLTA Office and Ontario Archives. Bryan Howard has everything I know and maybe

ten times more. He's better on events when I was less involved from 1990 to 1997 until I came back to the NEC and then re-engaged in 2001 at the ORMLT.

- Bryan, Ian and Ron have personal history/memories in the ten evolutionary years when land trusts emerged and action moved from NHL to ONTA to OLTA.
- I am so glad that you're assembling a Land Trust history here that can be written up because within about 5-10 years no one will be alive that knew what happened from 1982 to 2002. There are only 5 to 7 of us left who were there. 1982 to 2002 is the core germination time when Ontario Land Trusts grew into today's movement.
- Here is another personal conservation story. I was called by my NEC Chair in 1986, Terk Bayly, who was at that time, also OHF Chair. He had been at the winter garden theatre, attending a performance of "Cats" with Premier Peterson. Peterson said I have a speech to make tomorrow to the Conservation Council of Ontario (CCO) at their AGM but it's a ho-hum speech and I want to announce something good - what should I do? Terk said he should confirm intentions to pass the *Conservation Land Act*. He had been waiting for the time to advise the Premier, because the NHL had been talking about this for 3-4 years and wanted a political leader in Ontario to make it happen. The next morning Terk comes into my office and says can you write up the *Conservation Land Act* proposal and what's going to happen in no more than half a page, and send to Premier's Office (here's who) and Peterson will include it in his speech to the CCO. I said okay boss, started to collect my thoughts and wrote it in next 30 minutes, sent to Premier by fax and it was proudly announced in his speech. The next day I went to the Legislative Counsel's office in Queens Park who had 4 computer screens on his desk with every *Conservation Land Act* he could find. He asked what was this law to be about - I said we want to do this in my summary of key content and powers. It was a short Act, but it was powerful law to support more land conservation in Ontario, possibly the best since the *Conservation Authorities Act* passed in 1946.
- if I had to pick one thing out of my professional career that I was involved in it would be the *Conservation Land Act* as it had such incredible and progressive impact for the land trust movement and for the people of Ontario. The *CLA* is a wonderful action tool to have in our conservation kit today for land trusts and for everybody else. But I like to think that some of the concepts and values the NHL was able to get into the *CLA* are still there and it's still doing a great job. Land trusts would be working with only one arm and foot without it. It was an very unexpected circumstance that I was involved, so you learn in your career to "carpe diem = seize the day now". One thing I learned from Terk Bayly (he was in two tours of WW2 duty flying bombers protecting fleets in the Pacific - pilots learned that tomorrow is not guaranteed) was that if you can do something today – Do it!. And Terk said to me 'Let's do it now Frank'.
- The self-less work of all communities and volunteers in dedicated protection of your neighbourhood, province, country and planet is absolutely important. A quote from Jand Goodall copied below notes every person and every group can make a real difference in the community or the world, so it is always up to us to engage.

“What you do always makes a difference and so you have to decide what is the difference that you want to make” – Jane Goodall

Endnote from this interview in the follow up correcting and editing by Frank Shaw:
Neither my mentors nor my parents ever described to me, the real importance of this valued service to our community, our healthy, sustainable environment or the future of our planet in the words of Jane Goodall, but in their example of volunteerism, they prompted me to become involved for the clear reason given in her quotation.



2002 Frank Shaw and Bruce Shaw ❤️

3.2.10 Ric Symmes Interview

(Interview date: August 21, 2022, interviewed by Brianna Pitt)



When did you first get involved with the land trust movement? (When did you first become interested in preserving natural lands/ becoming a part of the land trust movement? Why?)

- My involvement with land use planning and preservation of natural lands began with a “crash”. In 1968 my wife and I had just completed construction of our first home on the Niagara Escarpment. The “crash” signaled the first load extracted from a fifty-acre industrial gravel pit planned for the farmland next to our house. This was our first warning, because notice was not required in those days and a pit license was approved by return mail. The community was soon up in arms and I was engaged in a vigorous public campaign that resulted in cancelation of the permit and later

to new pits and quarries legislation that required better planning, protective berms, rehabilitation and municipal consultation.

- No sooner was this gravel threat addressed than Ontario Hydro announced a massive 5 tower transmission line across the Niagara Escarpment and many sensitive areas. A citizens' group, the Coalition of Concerned Citizens (CCC) came together to challenge the proposed route and land assembly. Through the 1970's, I volunteered with the CCC, the Federation of Ontario Naturalists (FON – now Ontario Nature) and the Sierra Club of Ontario. We pursued a long process through the 1970's, including the Royal Commission on Electric Power Planning (Porter Commission). The result was a route that was shorter, avoided most sensitive areas, and cost less than the initial plan.
- To this point my involvement had been reactive – that is focused on efforts to minimize the damage from development proposals. Clearly a more pro-active planning approach was needed to identify important natural lands and find ways to protect those values. The Gertler Report identified the Niagara Escarpment as one such area. The *Niagara Escarpment Act* and Plan set a new standard. Ontario Parks introduced its “Blue Book” and embarked on a program of park creation and design that set aside special lands. I participated in campaigns to secure parks including the Missinaibi River and Wabakimi Parks in northern Ontario. I also volunteered with our local naturalists' club that stewarded part of the FON nature reserve network.
- In the 1980's, I was a director in the Ontario Heritage Foundation (OHF) while GHU Turk Bailey was the Chairman. We were actively involved in assembling protected lands under the Niagara Escarpment Plan. OHF at the time also had the legislative power to hold conservation easements, another tool for natural lands protection
- In 1990, I left my executive position at Canada Packers to set up Sternsman International, a consulting firm specializing in strategy and negotiation for natural heritage organizations. The Partnership for Public Lands (PPL), a partnership of WWF, FON and Wildlands League, was a major client in the 1990's.
- While acting as Executive Director of FON In the 1990's to 2001, I was involved in adding lands to FON's nature reserve program and FON's support of the Ontario Nature Trust Alliance – which subsequently became OLTA.
- Starting with the Harris Government election in 1995 and beyond, it became apparent that Ontario communities could not expect the Federal or Provincial government to protect the special natural lands nearby. The Land Trust Movement provided a working practical alternative where governments provided tax and planning policy support.
- In addition, for a period as Georgian Bay Huronia Manager for the Nature Conservancy of Canada, a national scale Land Trust, I worked with the Georgian Bay Land Trust, the Couchiching Conservancy and helped found the Huronia Land Trust.
- Since moving to London, Ontario I have been a member and director of the Thames Talbot Land Trust. I am a “true believer” in the importance and benefits of the Land Trust Movement in our communities.

What changes in policy (in your opinion) have had the greatest impact on the land trust movement (either negatively or positively)?

Significant changes in policy and programs included:

- The Ontario *Conservation Land Act* that extended authority for conservation easements to Qualifying Organizations (beyond OHF – OHT)
- Formation of the Ontario Nature Trust Alliance (ONTA which became OLTA)
- The Ontario Conservation Land Tax Incentive Program CLTIP
- The Environment Canada EcoGifts Program

In your opinion, what is the most effective method for land securement?

Which method is best depends on many factors including:

- The values and relative importance of those values.
- The threats, urgency of the situation.
- The interests of the current landowner (their family and influencers).
- The interests of the community.
- The resources available to the land trust including:
 - The relationship with the seller, the land use tools available such as severances, land trades, life tenancy,
 - Staff capacity such as the skills to manage a conservation easement,
 - Sufficient funds available both immediate and future.
- If the Land trust can raise the fair market value funds, "fee simple" purchase gives the most control over the property and is probably simplest and best for a high natural value property. High land cost or lack of funds may make the conservation easement the better alternative – if the land trust can provide the staff to monitor and the funds to defend the easement if subsequent owners do not abide by the restrictions. For an owner not willing to sell, some sort of stewardship agreement may be a way to preserve the values.

What has been your most fulfilling experience working in land conservation?

- **"Lands for Life"**, the 5-year land use planning process for much of northern Ontario initiated by the Harris Government in 1997 would be at the top of my life list. It resulted in 6 million acres of lands protected (with no mining, forestry, or hydro-electric), and was far more effective than the previous individual skirmishes over individual isolated patches of land. It also established a "new way in the woods" where the protection partners, "The Partnership for Public Lands" (PPL) undertook sincere "interest-based negotiation" with the leaders of the forest industry, the mining industry, and the Ontario Government (represented by MNR). The Partnership for Public Lands, supported by WWF, FON and Wildlands League, was

very strong technically and had adequate financial resources. PPL worked out solutions that boosted protected areas while providing for industry needs, plus employment... and we finished with a more respectful relationship that enhanced future problem solving. It set a pattern that was helpful to resolution of protected areas on the west coast and elsewhere.

What direction would you like to see the movement go in? (In what ways would you like to see the land trust movement evolve going forward?)

- **Recognize that much more protected land is needed:** Ontario south of the Canadian Shield is facing unprecedented population growth and development. We are in a race to protect a healthy network of protected lands. Government Agencies including Conservation Authorities have little capacity to secure and protect land, and the current government seems inclined to reduce the role of Conservation Authorities, and circumvent policy driven protections like the *Endangered Species Act*. This leaves public and private property owner education as one way to protect land and Land Trust securement as another viable tool for more natural area protection.
- **Filling in the gaps:** OLTA and the land trust movement could help the situation by promoting the creation of viable land trusts in the rest of southern Ontario where that protection option is not available (such as southern Simcoe County).
- **Becoming a major funding distribution source:** OLTA and its members need to greatly increase the funding available to secure critical lands and corridors. Land Trusts need to better compete for the kind of philanthropic funds that routinely flow to churches, educational and health institutions. To achieve this we must first develop and communicate a compelling vision and rationale for much greater funding.
- **Building partnerships:** New and powerful partnerships among conservation organizations will be needed to increase the funding of lands conserved. Further, we will need partnerships with groups and organizations whose interests overlap with traditional land conservers. For example, Impetus for eliminating coal improved when doctors advocated as well as environmentalists with the common interest in “air quality”. Land protection needs more partners including governments and first nations, agricultural industry, public health agencies and professionals, **In this regard, conservation organizations should consider the effectiveness of the Partnership for Public Lands model.** This group brought together many partners, created a compelling vision and negotiated to a successful outcome.
- **Foster Best Practices:** Financial failure or scandal could damage the credulity and effectiveness of all land trusts in Ontario. Developing and promoting practical best practices is extremely important to the long-term effectiveness of the movement.

What steps do you feel still need to be taken to ensure conservation success?

- I feel OLTA should take the lead or a role in the steps outlined above
- For individual land trusts, some new partnerships suggested above could be undertaken at the local level. Building relationships and cooperation with other organizations such as Conservation Authorities, media, potential funding agencies and individuals plus the development of volunteer support are all very important. Also, I think adherence to best practices, caution and due diligence are critical. We are in this for the long term. Finally, a strategic approach to land securement is likely to deliver the most benefits for our limited resources.

What changes would you make, if any? (be it to policy, legislation or the movement in general)

- Conservation organizations, including land trusts, need to persuade the broad public that a much stronger system of natural areas in southern Ontario is essential to our health, heritage and well-being. If the broad public support is in place, political entities will be more responsible, and funding should follow.

What has been the biggest challenge(s) you've faced personally or as part of an organization, pertaining to land securement?

- **Maintaining a strategic focus:** Immediate threats and issues tend to grab our attention. ATV's ripping up the back 40 or someone with pretty undistinguished land for sale can consume the time we might otherwise spend keeping in touch with the owner of the highest priority parcel, a supportive media person or major donor.
- **Development and Fund Raising:** Developing the funding sources so the land trust can make a timely and credible offer when the high priority lands are on offer. – or even being close enough to know that there is an opportunity.
- **Patience:** Even for the highest priority lands, the time must be right. The seller must be ready and interested in selling and the land securement officer must “wait for the stars to align”. Bill Sargent, acting for the Nature Conservancy of Canada (NCC) made a fair market offer for 300 acres in Minesing Swamp in 1965. Forty years later, the owner's son called me and the owner sold the parcel to NCC. For him, the time was right.

What advice would you give to the younger generation interested in joining the land trust movement?

- If the young person is looking for employment or a career in conservation, I would recommend that they apply where they will learn the most. Look for an organization with growth, success and qualified persons willing to share their expertise. A person might start by volunteering on some projects to see the breadth of experience in the staff and volunteers.
- If the young person is looking for benefits other than a paycheque such as companionship, interesting project work, nature knowledge or a change from a desk job, then volunteering for project work at a land trust may be just right. It is

important however, to watch for good standards of planning, safety and communications in these volunteer projects.

What are ways people can get involved in the movement?

- **Volunteers:** Volunteering can be a very satisfying and the amount of time may be flexible. Often land trusts assign responsibility to volunteer committees. Different committees evaluate candidate properties, review and manage finances, prepare social media material and other communications, plan outreach events or assist with property stewardship projects like boardwalks, forestry, restoration planting.
- **Staff/Employees:** Depending on the size of the land trust, all functions may be carried out by volunteers, but the medium and larger trusts have staff or contractors who carry out tasks such as bookkeeping, administration, forestry, restoration planting etc.
- **Supporters/ Enablers/Resources:** Supporters often have no specified job, but carry out important and beneficial functions such as introducing trust representatives to property owners, potential donors, officials or experts. They lend assistance, credibility, expertise and advice on a voluntary basis. They can make a very great contribution to the success of the land trust.

What is the biggest challenge in managing land owned by your organization?

- **Dealing with External Factors** that have impact on land trust land is probably our greatest challenge. Examples include: invasive species that arrive to displace native plants and species, drainage activities on neighbouring lands that change the water table and the ecology of our property, ATV's and trespassers that cause physical damage and climate change that is upsetting the best laid property management plans.

What method of land securement has led to the most success within your organization?

- I am currently with Thames Talbot Land Trust that owns 23 properties. Most were acquired by fee simple purchase through fund raising and grant writing, some by partial donation and partial fund raising and a few (and growing number) by full donation.
- We have a strategic rating of properties in our region and try to make contact with those owners so that they are aware of our interest. In some cases, we see a priority property come on the market and we approach the seller and other times we are contacted by the owner when they are ready to sell.

What do you remember about the early days of OLTA, or what was known as Ontario Nature Trust Alliance (ONTA) before 2002, and what role (if any) did you play in OLTA's work over the years?

- Early Days of ONTA and OLTA I remember:

- In the early 1990's. I remember Ron Reid returning from the US Land Trust Alliance Rally – inspired and energized. This was one new way to protect nature in Ontario.
- The Federation of Ontario Naturalists (FON) sponsoring and supporting the organization of the Ontario Nature Trust Alliance, and leading a strategic planning session for the interested parties.
- Ron Reid and Stewart Hilts preparing “Creative Conservation” – a practical handbook for local land trusts in 1993.
- Attending early ONTA then OLTA conferences to share experience and success stories.
- My personal involvement included:
 - As Executive Director at FON, providing staff support to ONTA.
 - Attending meetings and leading the first strategic planning session.
 - Behind the scenes discussions regarding the criteria for the Conservation Land Tax Incentive Program CLTIP. I learned that Treasurer Greg Sorbara (Liberal) and Former Premier Bill Davis (PC) reached a non-partisan agreement that “this is the right thing to do” for Ontario– and the bill passed.
 - As Georgian Bay Huronia manager for NCC, I worked with Couchiching Conservancy and the Georgian Bay Land Trust to create cooperative agreements and to secure properties.
 - Founding Director of the Huronia Land Trust.
 - Attended OLTA gatherings as a Thames Talbot Land Trust delegate.

Do you have any insight into what OLTA's/ONTA's role has been in the land conservation movement in the past 20+ years?

- In a decentralized federation like the land trust movement in Ontario, having a trusted convenor to address issues and opportunities is essential. ONTA and OLTA have made many important contributions to land conservation including:
 - Organizing annual conferences that are a significant opportunity for land trusts to share experience good and bad, to distribute information with expert presenters on a variety of topics, and to recognize achievements by participants in the land trust movement.
 - Publishing newsletters that share experience.
 - Providing resources such as manuals, forms, and contacts to assist members and persons who want to start up a new land trust.
 - Assisting with and administering certain grant programs.
 - Supporting and actively promoting the adoption of the national “Best Practices” in Ontario– a set of standards intended to assist land trusts avoid trouble and maintain a high reputation for responsibility. This function is particularly important for an industry where trustworthiness is of great importance.

3.2.11 Melissa Watkins Interview

(Interview Date: August 4th, 2022 by Interviewer Brianna Pitt)

When did you first get involved with the land trust movement? (When did you first become interested in preserving natural lands/ becoming a part of the land trust movement? Why?)

- I'd always been interested in knowing the natural world. When I was a kid, my mom always took us hiking and exploring and wandering the beaches near the little farm that I grew up on in Nova Scotia. So, I think my interest really started then, in knowing the land. We had just 13 acres, but I walked it regularly as a child. So, I think my interest came from that, which led me to pursue my education and natural resources management at the University of Guelph.
- As a student in the late nineties, I really got involved in Stew Hilts' classes on environmental stewardship. Stew was involved in the early days of the Ontario Land Trust Alliance and had invited me to get involved when I was a student. I really felt most at home in his classes, which always had this experiential learning component. So, we were in the field with maps and notebooks and it just felt like home. So, getting to know Stew led me to take on a work study position in his lab at the U of G Centre for Land and Water Stewardship.

Why/how did you get involved in the movement?

- An invitation from Stew Hilts, who was very involved. He was a faculty member at the University of Guelph, who was doing research and extension with private landowners to encourage them to conserve natural areas such as woodlands and wetlands on their property. And so I think without that, I wouldn't likely have found my way to the sector and to OLTA. That invitation from Stew was life and career changing for me anyways, because it introduced me to this world of work here in Ontario.
- In 1999, we were planning for the 2000 National Stewardship and Conservation in Canada conference. That was the first national conference on the topic that was held, and so we were convening all of the people from across Canada that were involved in stewardship and conservation. That was when I got to know the people in the sector. It was around that same time that I got involved in what was then ONTA, of course, and later became OLTA. I continued to volunteer with OLTA for about ten years after I got involved in 2000.

What changes in policy (in your opinion) have had the greatest impact on the land trust movement (either negatively or positively)?

- The Conservation Land Act was a big deal for the whole movement and it enabled many of the tools that are still used today in land conservation. For me, because I did work with the Ontario Farmland Trust, the Greenbelt Act was a very big deal for us in terms of policy, and so that enabled some great conservation of, well, at least some protection of land from sprawl and development which was happening around the

GTHA. I think, likewise, around a similar time, the Places to Grow Act had a big impact on lands that I was working on, or with, or around. With Places to Grow, I think one of the unintended consequences of that policy was that it directed development to places that were already growing, which were already sprawling on to some of the best and most productive lands in the province. So that was a negative impact and, I think, an unintended consequence of Places to Grow, like sending growth out into places like Waterloo region where there's really some of the best farmland still, farm and conservation lands. I tend to think of them as one and the same and that'll probably come out through our conversation -- that working landscapes in my mind are valuable to be protecting, just as natural areas are.

In your opinion, what is the most effective method for land securement?

- I think the most effective long-term approach are layers of protection. Land use planning feels like one of the most impactful ways to achieve widespread land protection. A lot of land at once could be protected through things like the Green Belt Act, for example. I wish we could count on the permanence of this approach, but I'm not super confident that we can. So, I think other tools, like private conservation easement agreements are really important to layer those levels of protection.
- Ultimately, the best way for land to be protected is for people to care about it, and for people to care about something they have to know it to an extent. So, in addition to those legal or policy approaches, that we need opportunities for people to experience the land so that they care enough to conserve it. Sometimes these opportunities can be exclusive to privileged landowners, and I think that in Ontario we need a bit more of an invitation for everybody to know the land so that they care more, and are more likely to contribute to something like the land trust movement.

What has been your most fulfilling experience working in land conservation?

- I think some of my most fulfilling moments have been just really personal moments of having the opportunity and privilege to work on other people's lands and help them get to know the special aspects of their properties. I had worked, for example, for a summer as an intern with the Nature Conservancy of Canada and got to visit a lot of really special properties across the province. And one on Pelee Island comes to mind. We were just getting to see the really special features of the landscape and the beautiful savanna area -- a landscape that was totally unfamiliar to me as well, and we were doing a conservation inventory plan for the property. I think of moments like that as being the ones that were really most fulfilling for me personally. Helping people understand their properties more and having the privilege of experiencing them myself by being involved in that way.

What direction would you like to see the movement go in? (In what ways would you like to see the land trust movement evolve going forward?)

- I think things are on a good path in many ways. I haven't really kept up with the policy so much, but I still feel like growing the Greenbelt seems like such an obvious win for the province that if we applied the same level of protection to areas that are outside of the Greenbelt as we have provincially to that area, which has been at least to some extent, successful at protecting some of the best lands right around the GTA from development. So anything that could be done to support an effort like that seems worthwhile.
- I think more public access to land that goes hand in hand with that knowledge exchange piece. I know that many of the land trusts across Ontario are doing great work to connect people with the lands that they work to protect, but I think finding ways to do more of that and helping people to know the land better is something we should continue to do and probably do more of. And I mentioned my interest in working landscapes, so I would love to see a greater focus on working landscapes. And farmland preservation being one of the things that I think all of the land trusts across Ontario could be doing more of as resources permit. If people have opportunities to know the land and understand where their food comes from, there is a real opportunity there to make that caring connection about why you would want to get involved and why you might support the efforts of the land trust. I think that is a real opportunity, a missed opportunity so far for other land trusts to get involved. And then I'm seeing a lot of great work in other sectors around anti-racism and reconciliation work, and it hasn't been as obvious to me yet in the land trust sector. So, I hope that we see more of that in the future.
- A majority of the best farmland in Canada can be seen from the top of the CN Tower on a clear day. There's so much pressure on those lands and it's easy to forget when you're driving through rural Ontario that it really is a finite resource because it can feel like we have so much farmland. But you have to realize that a lot of that land that might be producing corn, wheat or soy is not always as well suited to produce the food that we eat, vegetables and other horticultural crops. There's an educational piece that's needed so that people understand the value of those lands.

What steps do you feel still need to be taken to ensure conservation success?

- I think we touch on this a little bit at the early points of the interview, my master's degree looked at how land trusts were managing land that they owned and whether they were doing enough really to actually protect and defend the properties. If they were to be challenged at some point. And so I don't know if anything has been established in the sector yet, but an easement defense fund still seems like a necessary and useful thing. Something that's pooled that would allow any land trust that was being challenged to tap into resources that could ensure that they could defend, for example, if someone wanted to challenge an easement or if there was unapproved development or something on a property, that there would be funds for legal defense or for negotiations. I don't think exists yet, but that I still believe would be valuable for the sector.

What changes would you make, if any? (be it to policy, legislation or the movement in general)

- I already had mentioned growing the Greenbelt, so that seems like an obvious thing to me so that we would extend that level of protection to the rest of the farmland across the province. And I think farmland-specific conservation tools for working easements, like working farmland easements, on working farm properties would be great. A lot of the farmlands that are protected are done using conservation easement agreements that are really for the purpose of protecting natural areas and don't always foster the ongoing productivity of farmland. There is a need and an opportunity for there to be a legal tool that would enable protection of those working landscapes better than what's currently there.
- The movement generally needs to engage black, indigenous and people of color much more than it has to date, as well as non-landowners. People who have land are a natural fit in terms of volunteers that get involved in the sector, but I think there is a barrier for people who don't have the privilege of owning land and likely never will to see themselves in the movement. It's important for us collectively to think about how we find ways to make those people feel included. I, myself, am one of those people, a non farmland owner that is very passionate about the work of land conservation, but also will never really feel like I can contribute by protecting any land. You know, I have a little urban property, but nothing significant to contribute to the conservation, other than my time.

What has been the biggest challenge(s) you've faced personally or as part of an organization, pertaining to land securement?

- There's a philosophical conflict between land preservation, stewardship and conservation. Preservation being an idea of like lock it up, protect it, keep it under glass and conservation really being more about that stewardship and wise use of resources and I think we have to do both within the land conservation movement. There are properties that are particularly ecologically sensitive or damaged that need us to stay away, but I do think that generally my mindset is that we need to be working with the land and that people need to be experiencing it. And so coming back to that point around the conservation easement agreements and struggling to use that tool, when I was with the Ontario Farmland Trust to achieve protection of working lands there, it just felt like one of the bigger challenges. Like we were ticking off boxes of protecting the land but is it really protected for the purpose that we're trying to protect it? I mean, theoretically, you are if the land is not developed, you are protecting future potential. But if class one farmland is left fallow and is growing trees and shrubs over time have you really met your goals as an organization that's setting out to protect the land for a certain purpose? So, I guess, there's no particular story or property that comes to mind around that other than that always felt like a bit of a personal challenge about the work that we were doing and whether we were ever doing enough.

What advice would you give to the younger generation interested in joining the land trust movement?

- Do it! You can have a career or a volunteer role that has real purpose and I think that is something to get excited about. I would say also study the science, but also listen to the stories of the land. This work and this movement is as much about science as it is about storytelling. I'm not a particularly great storyteller and I lean a little more towards the science side, but I think it's an exciting opportunity to weave both kinds of strengths together. And I think it's something that drew me to the work in the first place.
- I guess another piece of advice is to look around also and see who's missing from the movement and bring them with you. We will be stronger if we diversify as a movement. So having young people and especially bringing others in who haven't been involved and looking for opportunity to remove barriers to their engagement. It's something that's going to be important for the future.

What are ways people can get involved in the movement?

- Yeah, I think OLTA does a great job of telling people how to do that. I think joining a local land trust is a great way to get involved. I think just visiting a park or a conservation property that's open to the public is a great way to start to care if you don't already. So volunteering, some people might be in a position to donate whether that's their time as a volunteer or cash towards projects that excite them or might have a meaningful impact in their communities. So those are things to consider. And advocate for the places that you love. I think there could be more outspokenness in the sector about the places that people care about. We are a pretty subdued bunch as a whole. And then I would say talk to the landowners in your life, if you have any, about the future. People have family members, friends, neighbors that, you know, maybe just need some encouragement to think creatively about what they might do with their lands down the road and how they might be treasured by others. And so just having those conversations is a role that people can play in the movement that will help grow the movement.

What is the biggest challenge in managing land owned by your organization?

- That's not so relevant to my work now at the University of Guelph, although the first thing that came to mind was around reconciliation with Indigenous communities, which was always a question in the background of my work with land trusts. It's also a big question for any big landholding organization in the province. I think it's like, how do we do right by our current understanding of the injustices that have happened around land holdings and takings of land over generations. We need to, as a movement, grapple with this. And I think that it's been one of the challenges that I haven't ever really felt like I have good answers to. You know, I can imagine that if I had oodles of land and oodles of money, I could do things that would allow us to return land and resources to Indigenous communities, but I think we have to tackle

this question about how we engage with First Nations and try to do right by everybody in that regard.

What method of land securement has led to the most success within your organization?

- Again, that's not super relevant to my work now, but I think that conservation easements have been such an enormous tool for the sector. I think from my vantage point, it seems like that has been one of the most powerful tools to enable local community land trusts to advance their mission and demonstrate perpetual commitment to the lands that they and the landowners they work with care about but there's also such an opportunity to have really widespread impact with land use planning policies in a way that doesn't always get you that that caring connection, but I think does help in the long run sustain land conservation and can allow us to accomplish widespread protection of land from a variety of pressures all at one time. Easements and land use planning policy.

What do you remember about the early days of OLTA, or what was known as Ontario Nature Trust Alliance (ONTA) before 2002, and what role (if any) did you play in OLTA's work over the years?

- I was involved in the early days and also, I feel like time is a blur and memory fails me already. I was invited when I was an eager student at the University of Guelph to begin attending meetings at the Ontario Nature Trust. And I think the meetings were held at the Ontario Heritage Trust offices or I remember going to Graham Bryan's office and having meetings there. I was the eager notetaker, which evolved to my role on the board, which ended up being a decade long commitment for me that morphed into me getting involved with the Ontario Land Trust Assistance Program as well a little funding program that OLTA offered or maybe still does. I stayed involved with that a little bit after I left the board, after about eight or nine years. My research was also feeding into the development of the first Canadian land trust standards and practices. I had been doing a lot of work looking at and learning from the Land Trust Alliance in the U.S. We had great opportunities to learn from an organization that was a little more advance than we were and so going to their rallies in the US allowed us to bring back ideas for our gatherings here in Ontario. The other great things that come to mind were really around the gatherings that were held around the province, which allowed for connection between the different community land trusts. I also remember the people -- the great friends and colleagues along the way. People like Stew Hilts and Peter Mitchell, Kim Gavine, Ian Attridge, Ron Reid, Christopher Bains, Lisa Mclaughlin, and so many more. All of these people really welcomed me and made me feel really included as a young person who was really at the outset of my education and my career, but I was also really empowered to take on leadership and governance roles within the organization. I really learned a lot about organizational leadership and governance which I think has contributed a lot to my career and where I've gone in my work and the work that I've done in setting up a couple of start-up organizations, but also, to

lead me to leadership positions where I been able to bring that to bear in wherever I've gone. It really was career formative time for me, just as it was a formative time for OLTA. Hopefully I've contributed as much as I benefited from all of that.

Do you have any insight into what OLTA's/ONTA's role has been in the land conservation movement in the past 20+ years?

- OLTA has been a really important connector for all of the land trusts in Ontario and I think a community, a practice and a hub for knowledge exchange. We weren't using those terms at the time to describe what we were intending to do with OLTA, but I think that has been. I was involved for the first half of the past 20 years anyway. It's been an important place for coming together and I hope that in the next 20 years that OLTA will continue to be an advocate for the land and the people that might otherwise slip through the gaps. There are little parts of the province that aren't covered by other community land trusts, and so I think there's a role to help people feel engaged in those places where there might not be an opportunity to get involved in a land trust. I also hope that the movement continues to become more and more inclusive and OLTA could demonstrate some leadership in looking at who's around the table and who might not be there yet and how we might play a role in removing barriers and getting people involved.



Circa 2001 L to R: Carolyn Webb, Sarah Hughes, Melissa Watkins, and Kate Barrett working on conservation plans for the Nature Conservancy of Canada

4.0 Reflections

'Conclusions' or 'The End' is not an appropriate way to close this manuscript when we are dedicated to conservation where 'in perpetuity' is our key mission. So, a shout out to the contributors to this OLTA history project and, as we move forward to ensure that it is NOT

‘the end’ for the natural world we know and love and need, in order to survive, we can thank these individuals and many more for providing us with the tools that we know make a difference. Never has the time been so critical for species survival and our own. While this report focussed on OLTA and building the context that enables conservation land trusts to function in Ontario, OLTA is the sum of its members. By continuing to work together as a team and build on the legacy and tools that were provided to us by the people who have just told us their story on how, we *can* make a difference. Visually you can see the land trust community emerge and grow by watching this Prezi presentation:

<https://prezi.com/view/IGZ2UYErybTtxPxyCROa/> . A lot has been accomplished in a short period of time and the momentum continues while the need, as we all know, gets more acute. The land trust legacy will grow exponentially by all of us working together building our skills, our securement and protection tools, totally bound by our determination and will to preserve our natural heritage ... in perpetuity ~ BH



On May 6-7, 2022 the OLTA Board of Governors and senior staff reconnected in person at the Ecology Retreat Centre, near Mono. Overdue reconnection with each other was remedied by campfire stories and two days’ discussion of strategic topics, including, the Board’s role in philanthropy and fundraising, fiduciary responsibilities, advancing OLTA’s EDI agenda, and where we would like the organization to be in another 20 years! L to R, Kimberley MacKenzie - Vice Chair, Morgan Roblin – Conservation Science Manager, Barb Heidenreich - Governor, Beth Gilhespy – Treasurer, Jenna Siu - Governor, Caroline Schultz – Chair, Sara Kelly – Governor, Ian Attridge – Governor, Gayle Wood - Past Chair, Joyce Chau – Governor; Patricia Wilson – Governor, Alison Howson – Executive Director (missing from this picture are Frank Saw and Katherine Gold)

Appendix A: Literature Reviewed in Alphabetical Order by Author

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APPENDIX B: OLTA Board Chairs and Executive Directors (from 1997 to 2022)

Board Chairs & Executive Directors (from 1997 to present)

Board Chair

NAME	YEAR
Ron Reid	1997 – 2000 (ONTA)
Stew Hilts	2000 – 2003 (ONTA and OLTA)
Bernie VanDenBelt	2003 – 2005
Chris Baines	2005 - 2008
April Wepler	2008 - 2009
Wendy Cooper	2009 - 2011
Tanna Elliott	2011 - 2014
Mike Hendren	2014 - 2016
Kristie Virgoe	2016 - 2019
Gayle Wood	2019 – 2021
Caroline Schultz	2021 - present

Executive Director (ED)

NAME	YEAR
Chris Baines	1997 – 2002 (ONTAP Manager)
Dave Walker	2002 – 2006 (Admin and ED)
Kathy Allan	2006 – 2009
Ian Macnab	2009 - 2011
Thea Silver	2011 - 2014
Deb Thompson	2014 - 2016
Lori DeGraw	2016 - 2017
Alison Howson	2017 - present

Explanatory Note:

This record is for the calendar years only (not the specific months of start or finish) in which the persons served. There is often an overlap in years since OLTA fiscal year (FY) is from July 01 to June 30 and AGM elections have been usually held in October. Sometimes an ED appointment or change has been unrelated to the FY or the AGM. OLTA evolved from the Ontario Nature Trust Alliance (ONTA).

Appendix C: List of OLTA Governors (to 2022)

First	Last	First	Last
Ron	Reid	Dann	Michols
John	Riley	Duncan	Jones
Greta	McGillvray	Joe	McCalmont
Don	Ross	Peter	Carson
Gord	Ball	Mark	Carabetta
Frank	Morley	Erica	Thompson
Jeff	Thompson	Tanna	Elliott
Marina	Martin	Jen	Baker
Chris	McDonell	Mike	Hendren
John	Lounds	Gregor	Beck
Rick	Barnard	Kim	Gavine
Stella	Ostick	Patricia	Short-Gallé
Dennis	Berry	Brian	Banks
Susan	Bryan	Mary Alice	Snetsinger
Brad	Peterson	Angela	Van Niekerk
Ian	Attridge	Susan	Ungurean-Cumming
Bob	Barnett	Gary	Hoyer
Andrea	Kettle	Travis	Allan
Judy	Eising	Rob	Keen
Stew	Hilts	Bill	Lougheed
Sally	Gillis	Bev	Rodin
Angus	McLeod	Mark	Bisset
Melissa	Watkins	Paul	Peterson
Don	Gordon	George	Gordon
Jamie	Laidlaw	Kristie	Virgoe
Alan	Ernest	Frank	Shaw
Bernie	VanDenBelt	Stephanie	Sobek-Swant
Bill	Salter	Barb	Heidenreich
Katie	Goldberg-Zwick	Gayle	Wood
Christopher	Baines	Jeremiah	Brenner
Jo-Anne	Rzadki	Brian	Hobbs
Peter	Hannah	Sara	Kelly
Joan	Eaglesham	Caroline	Schultz
Brian	Byrnes	Kimberly	MacKenzie
April	Weppler	Kathryn	Gold
Lisa	McLaughlin	Beth	Gilhespy
Wally	King	Joyce	Chau
Lionel	Normand	Patricia	Wilson
Wendy	Cooper	Jenna	Siu

APPENDIX D: List of OLTA Members (past & present)

Land Trust Members

Algoma Highlands Conservancy
Alton Grange Association
American Friends of Canadian Land Trusts
Blue Mountain Watershed Trust Foundation
Brant Land Trust
Bruce Trail Conservancy, The
Canada South Land Trust
Couchiching Conservancy
D.I.A.M.O.N.D.S. Conservation Land Trust
Escarpment Biosphere Conservancy
Georgian Bay Land Trust
Haliburton Highlands Land Trust
Hastings Prince Edward Land Trust
Hamilton Naturalists Club (Head of the Lake Land Trust)
Huron Tract Land Trust Conservancy
Huron Land Conservancy
Kawartha Land Trust
Kensington Conservancy
Kingston Field Naturalists
Kitchener Waterloo Field Naturalists
Lake Clear Conservancy Inc.
Lake of Bays Heritage Foundation
Lake Superior Watershed Conservancy
Lambton Wildlife Incorporated
Land Conservancy for Kingston, Frontenac, Lennox & Addington
Land Preservation Society of the Ottawa Valley
Lone Pine Land Trust
Long Point Basin Land Trust
Lower Grand River Land Trust
Magnetawan Watershed Land Trust
McIlwraith Field Naturalists
Mississippi Madawaska Land Trust
Muskoka Conservancy
Niagara Land Trust Foundation
North Shore Stoney Lake Land Trust
Northumberland Land Trust
Oak Ridges Moraine Land Trust
Ontario Farmland Trust
Ontario Nature
Orono Crown Lands Trust
Otonabee Region Conservation Foundation
Rainy Lake Conservancy
rare Charitable Research
Rideau Valley Conservation Foundation
Rideau Waterway Land Trust Foundation
Shadow River Land Trust

Speed River Land Trust
Thames Talbot Land Trust
Thickson's Woods Heritage Foundation
Thousand Islands Watershed Land Trust
Thunder Bay Field Naturalists
Valleys 2000 (Bowmanville Inc.)

Associate Members

Ducks Unlimited Canada
Manitoba Habitat Heritage Corporation
Nature Conservancy of Canada - Ontario Region
Nature Trust of New Brunswick
Nova Scotia Nature Trust
Ontario Heritage Trust
Conservation Ontario
Langford Conservancy

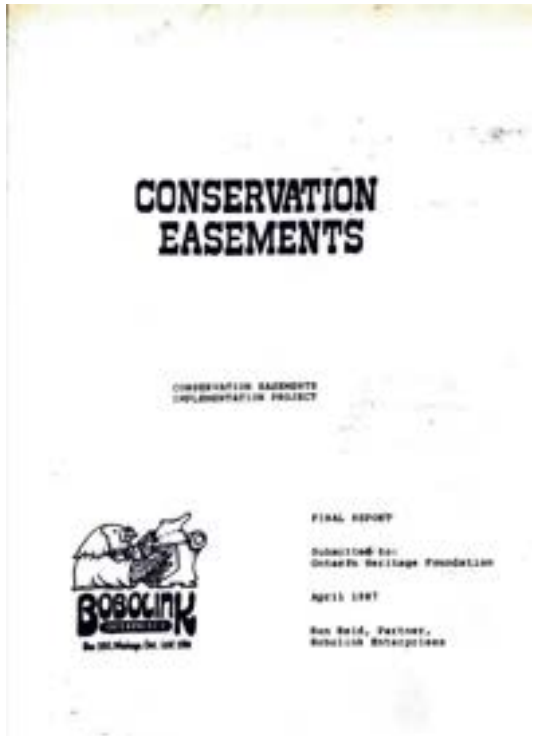
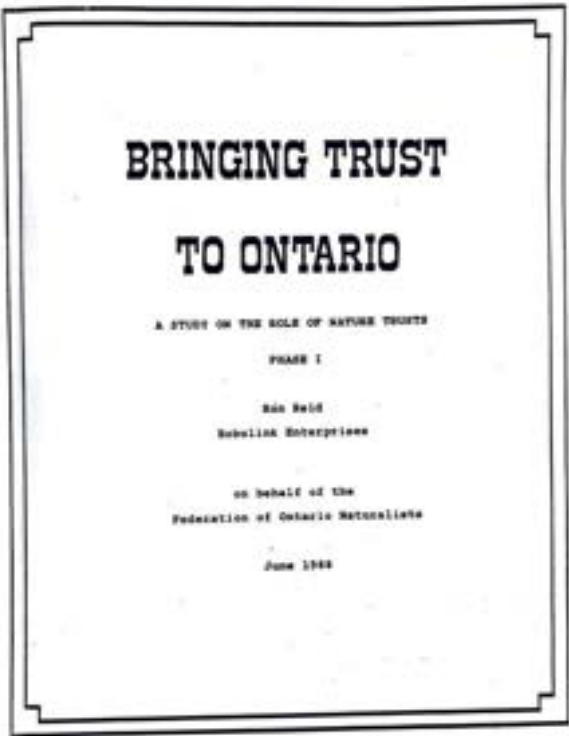
Conservation Authorities

Catfish Creek Conservation Authority
Central Lake Ontario Conservation Authority
Conservation Halton
Credit Valley Conservation
Essex Region Conservation Authority
Grand River Conservation Authority
Hamilton Conservation Authority
Lakehead Region Conservation Authority
Lower Thames Valley Conservation Authority
Lower Trent Conservation
Maitland Valley Conservation Authority
Nickel District Conservation Authority
Otonabee Region Conservation Foundation
Rideau Valley Conservation Foundation
St. Clair Region Conservation Foundation
South Nation Conservation
Toronto Region Conservation Authority
Upper Thames River Conservation Authority



Photo:B.Heidenreich

Harvais Orchid Reserve *Cypripedium reginae*





**CONSERVATION EASEMENTS (CEAs)
AS A GROUNDWATER PROTECTION TOOL
IN ONTARIO**

David Paul George
94171042

A Senior Honours Thesis Submitted in Partial
Fulfillment of the Degree of
Bachelor of Environmental Studies
(Honours Geography)

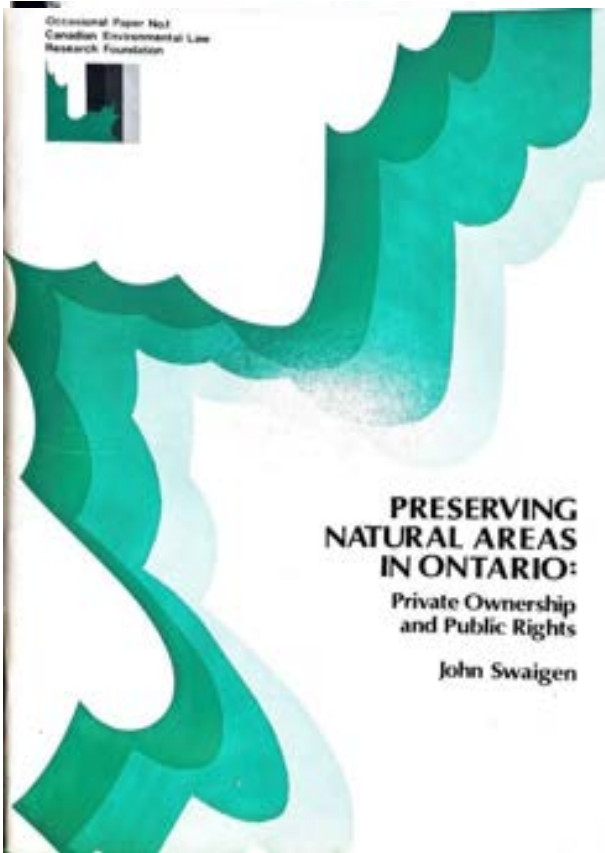
Department of Geography
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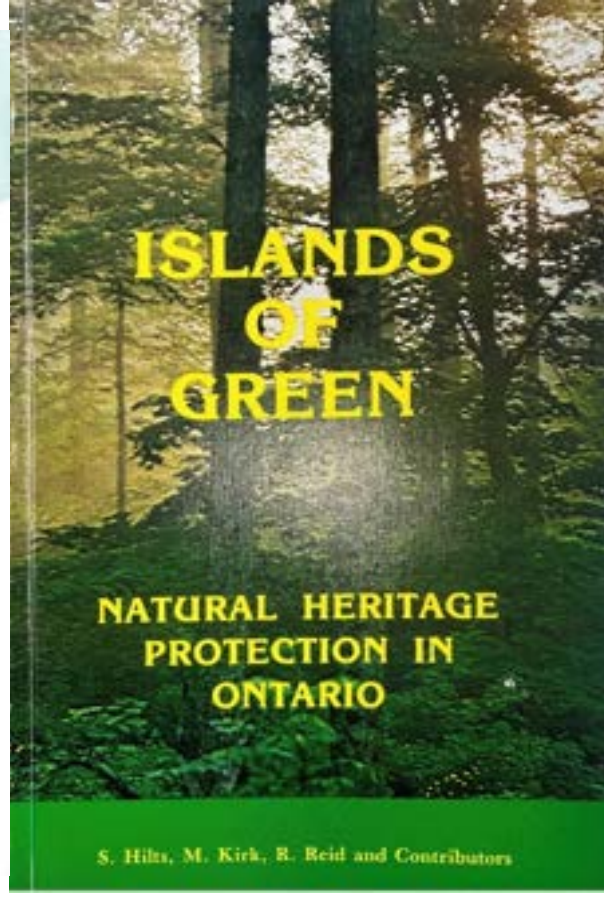
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Occasional Paper No. 1
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**PRESERVING
NATURAL AREAS
IN ONTARIO:**
Private Ownership
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John Swaigen



**ISLANDS
OF
GREEN**

**NATURAL HERITAGE
PROTECTION IN
ONTARIO**

S. Hiltz, M. Kirk, B. Reid and Contributors

**Ontario's Natural Heritage:
Options for Protection**

A Manual for Land Conservation Organizations

Yvette C. Wells
Southwestern Region
Ontario Ministry of Natural Resources

Revised: November 1989

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Yvette Wells



Ontario Heritage Foundation
14 Adelaide Street East
Toronto, Ontario M5C 1J8
Phone: (416) 325-0019
Fax: (416) 325-0071



ARTHUR HERBERT RICHARDSON

**Conservation by the People:
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A Summary of the Land Protected by Land Trusts and the
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Draft for Discussion

Melissa Watkins and Stewart Hills
Centre for Land and Water Stewardship
2002

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**CONSERVATION EASEMENTS AND THE
PRESERVATION OF NATURAL AREAS
ON PRIVATE LANDS**

A BACKGROUND REPORT

December, 1994

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Tim M. Silver
Delta Waterfowl Foundation
R.R. #1
Portage la Prairie, Manitoba
R2N 3A2