



## LONG RANGE PLAN

**2014-2020**

*Adopted by the Board of Trustees on March 4, 2013*



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## Maryland Environmental Trust LONG RANGE PLAN (LRP)

### Executive Summary

The Maryland Environmental Maryland (MET) was established by the Maryland General Assembly in 1967 as a charitable organization with an independent Board of Trustees, which included State support and funding. In 1969, MET was assigned to the Department of Natural Resources for organizational purposes.

In April 2010 the MET Staff prepared and the Board approved a Strategic Plan for the years 2010-2012, which guided the priorities and work activities of MET staff for these years. Many accomplishments during these and prior years demonstrate that MET is a state and national leader in land conservation, having protected more than 129,000 acres of open space, historic, natural resource and farm land with over 1,040 conservation easements; established a network of 50 private land trusts at the local or regional level; and successfully implemented other award-winning programs.

Anticipating the many challenges to Maryland's environment after 2012, the MET Board of Trustees established a Long Range Plan Committee (LRPC) and, beginning in April 2011, engaged in a strategic planning process. This included a board retreat, an assessment of the organization's strengths, weaknesses, opportunities and threats, a community survey and interviews facilitated by a consultant. The Board also commissioned a *Maryland Environmental Trust Organizational Assessment Report*, by a consulting group specializing in strategic planning for land conservation organizations. After several LRP drafts by the LRPC, another consultant was asked to review the drafts in the context of Maryland's current State plans and strategies for smart growth and strategic land conservation. This involved interviews with MET board members, area representatives, staff and MET's State and private partners, and suggested changes to the LRP draft. As a result, the following Long Range Plan now proposed by the LRPC is a product of many meetings of the committee and board, a synthesis of findings and recommendations of consultant reports, and a refinement of several prior drafts of the Long Range Plan.

#### **The Long Range Plan Vision:**

*“To be among the leaders of Maryland’s statewide efforts to preserve and protect natural, working and urban landscapes, open space, sensitive lands and water resources for the benefit of its citizens and of future generations.”*

#### **The Mission** expands on this broad Vision:

*“MET serves as the model statewide land trust and is a recognized national and state leader in private land conservation.”* This includes partnering with DNR and other agencies; serving as a central resource of support for the land trust community including co-grantee partnership and shared stewardship of conservation easements; a model stewardship program to meet or exceed national standards; sustainable funding from multiple sources; preserving its role as an efficient, independent organization and primary information resource.

**The Long Range Plan's Goals for MET**, each with detailed implementation strategies, include:

- I. *Engage in Land Conservation Planning***, including the preparation of an *MET Land Conservation Plan*, coordinated with other regional, State and local plans and programs.
- II. *Enhance Conservation Easement Stewardship***, to strengthen and enhance MET's role in the statewide stewardship of conservation easements.
- III. *Strengthen and Enhance MET's role in land trust assistance and conservation education***, a role that MET is uniquely situated to provide, including a land trust needs survey, reevaluation of the Maryland Land Trust Alliance, increased visibility of MET's services and support, and others.
- IV. *Seek and obtain accreditation by the Land Trust Accreditation Commission***, to enable MET to serve as a model of best practices for Maryland land trusts.
- V. *Tell the Maryland Environmental Trust Story to the Maryland Public, the Governor and General Assembly***, illustrating its vital place in Maryland's open space conservation accomplishments, involving multiple media venues and preparation of a 50 year MET history.
- VI. *Strengthen and Improve Governance and General Operations***, regularly reviewing and ensuring that it is maintaining up to date and responsible operations and staff activities and the facilities and support services needed.
- VII. *Place MET on a Strong and Secure Financial Footing***, assessing and to the extent appropriate seeking additional resources beyond those provided through State appropriations

The many strategies to implement these goals are designed to guide The Maryland Environmental Trust through the next eight years, as a stronger and more effective organization to lead and assist the State of Maryland carry out its ambitious State plans for Smart Growth and targeted land preservation. They will enable MET to play a vital role with the Department of Natural Resources, Maryland Agricultural Land Preservation Foundation, Maryland Department of Planning, counties and its other partners in collaborative land conservation and environmental protection worthy of one of America's most beautiful and livable States.

# Maryland Environmental Trust

## LONG RANGE PLAN (LRP)

### Introduction

Maryland Environmental Trust (MET) was established by the Maryland General Assembly in 1967 as a charitable organization with an independent Board of Trustees which included State support and funding.

The purpose of MET as set out in the governing statute is: *“To conserve, improve, stimulate, and perpetuate the aesthetic, natural, health and welfare, scenic, and cultural qualities of the environment, including, but not limited to land, water, air, wildlife, scenic qualities, open spaces, buildings or any interest therein.”* *“Through educational and other means, the Trust shall encourage and motivate the populace of the State and others to do so and shall promote continuing interest in and the study of these matters.”*<sup>1</sup>

Over the years MET has established award-winning programs and services to protect open space and natural, cultural and resource lands. These have included:

- Acquisition of and stewardship of over 1,040 conservation easements, primarily donated by private landowners but also including some purchased by DNR and Maryland Department of Transportation under special programs such as to protect Rural Legacy Areas and Civil War sites, respectively;
- Creation of a Land Trust Assistance Program that has increased the number of non-governmental/non-profit land trusts in the State of Maryland from six to over fifty in the past 25 years, thus fostering a growing movement of localized land trusts able to expand the number of protected lands in Maryland;
- Creation of the Maryland Land Trust Alliance, a state-wide network of local land trusts providing a forum for conservation communication, education and interaction;
- Establishment of a Rural Historic Village Protection Program;
- Administration of the State’s Keep Maryland Beautiful Program;
- Provision of environmental awards, education, training, and volunteer recognition programs;
- Receipt and administration of gifts of land to be protected with conservation easements, and for subsequent return to private ownership.

### VISION

**To be among the leaders of Maryland’s statewide efforts to preserve and protect natural, working and urban landscapes, open space, sensitive lands and water resources for the benefit of its citizens and of future generations.**

## MISSION

MET serves as the model statewide land trust and is a recognized national and state leader in private land conservation. MET's Mission is to:

- join with the Department of Natural Resources and other State land conservation and planning agencies in achieving Maryland's land conservation goals, while maintaining the flexibility and charitable support provided by its unique status;
- serve as the central independent resource of support for the Maryland land trust community, providing technical assistance, training, information sharing, grant and loan funding, co-grantee partnership and shared stewardship of conservation easements. MET is a forum for land trust communication and advocacy;
- ensure the perpetual conservation of easement property, consistent with the goals of easement donors, with a model stewardship program that meets or exceeds national standards and practices, including monitoring, landowner and co-grantee education, positive landowner relations, and enforcement when needed;
- solicit and obtain increased funding and resources from multiple sources sufficient to support a professional staff and enhanced conservation services to private landowners, the land trust community, and the State of Maryland;
- ensure its continued effectiveness on behalf of the people of Maryland by protecting and preserving its role as an efficient, independent organization able to respond directly to landowners and others committed to the purposes for which MET was established;
- be recognized as the primary informational resource for governmental organizations, local land trusts, state and county programs, and citizens by educating, assisting, and partnering in pursuit of their and MET's mutual goals; and
- be a leader in development of effective stewardship practices that foster public appreciation and enjoyment of the conserved property within the state.

## LONG RANGE GOALS AND STRATEGIES for 2014 to 2020

Following are seven specific goals, and strategies for implementing those goals, in forms that are actionable. By assigning implementation projects to trustees, area representatives, committees, staff, volunteers, and consultants, and adopting from time to time specific dates for implementation, the Board and staff will be able to measure progress toward meeting these goals and their ultimate achievement.

### GOAL I--Engage in Land Conservation Planning

Subject to obtaining the necessary staff and other resources needed, prepare and adopt an *MET Land Conservation Plan* identifying the types of lands and resources that are most important for MET to protect with conservation easements and gifts of land. The Plan should take into account general location priorities related to county Priority Preservation Areas, PlanMaryland, Green Infrastructure, Rural Legacy and other State and local preservation designations, and be coordinated with the *Maryland Land Preservation, Parks & Recreation Plan*. In addition, the plan should incorporate specific geographic and resource targets, e.g. *focus areas*, for increased solicitation of conservation easements, formation of new land trusts, and acquisition of easements to protect Maryland's most treasured landscapes and threatened natural, agricultural and cultural resources.

### STRATEGIES

1. Consult with DNR, Maryland Department of Planning, Maryland Department of Agriculture, Maryland Agricultural Land Preservation Foundation (MALPF) and major land trusts to identify priority conservation focus areas. Conservation Focus Areas might include, among others:
  - a) Lands along designated National and State Scenic Roads, By-ways and State Highway Administration (SHA) surplus lands in rural areas, in partnership with SHA;
  - b) National Register, State Register and locally designated rural historic districts, Heritage Areas and battlefields, in partnership with land trusts, counties, Maryland Historical Trust and Civil War Preservation Trust;
  - c) Greenbelts around Priority Funding Areas and rural villages with character;
  - d) Concentrated and contiguous areas of sustainable resource lands, including working farms and forests, in partnership with other land trusts, MALPF, Rural Legacy, Maryland Forest Service and the Harry R. Hughes Center for Agro-Ecology, Inc.;
  - e) Chesapeake Bay watershed lands with opportunities to include public Bay or tributary access in conservation easements, where appropriate, and improve Best Management Practices for water quality, environmental restoration projects for meeting State & Environmental Protection Agency Total Maximum Daily Loads – Watershed Implementation Plan goals, in partnership with DNR and Maryland Department of the Environment, Chesapeake Bay Trust, Chesapeake Bay Foundation, Critical Area Commission, and private landowners;
  - f) Scenic River or stream corridors with high Green Infrastructure, water quality, wildlife and recreational values;
  - g) Urban landscapes and community open space, including greenbelts; and

- h) Sustainable resource lands potentially affected by new energy infrastructure.
2. Utilize GreenPrint, AgPrint and Green Infrastructure Geographic Information Systems maps to identify priority resources and properties for protection within each focus area, and create a database with maps describing protected and targeted properties.
  3. Consult with local land trusts, community leaders and local governments to determine local support for conservation activities.
  4. Develop criteria for assessing land resources and establishing preservation parcel priorities and sequence of easement acquisitions.
  5. Prepare preservation strategy maps for each focus area illustrating the importance, priority, and sequence of conservation parcel targets, with narrative on approach, staffing, partnership assignments and timeline for completion.
  6. Evaluate existing practices and develop additional practices for soliciting landowners and negotiating and drafting easement documentation, and assembling baseline data. Wherever possible, utilize uniform systems.
  7. Seek grants from foundations and similar organizations and government agencies for the needed resources in order to provide the staff and other functions necessary to achieve the goal.
  8. Establish a team of MET and other experts to evaluate and advise landowners of threatened farms, forests, natural or cultural resource areas on the choices and programs available to landowners for preserving their land from development, and Best Management Practices for conservation easement lands.

## **GOAL II--Enhance Conservation Easement Stewardship**

Strengthen and enhance MET's role in the statewide stewardship of conservation easements, acquired through private donations and otherwise. (see also "Stewardship Strategy" adopted September 28, 2011.

### **STRATEGIES**

1. Establish goals for MET staff and volunteers to annually monitor all MET conservation easements with full documentation.
2. Assist local land trusts in their efforts to increase monitoring. With cooperation and assistance of DNR, consider development of a document and data management system such as Microsoft's *Sharepoint*.
3. In cooperation with DNR, consider an expanded MET role for stewardship of conservation easements purchased and held by DNR through the Rural Legacy, Forest Legacy, Conservation Reserve Enhancement Program, Civil War Sites and other Program Open Space (POS) funded programs.
4. Assemble teams of volunteers (trustees, area representatives, local land trust and landowner volunteers) to assist in monitoring.
5. Ensure that ownership records are maintained and up to date.

6. Use monitoring as a device to remind landowners of responsibilities and benefits of land conservation.
7. Explore methods and encourage county and municipality adoption of procedures for flagging permit applications and land transfers involving properties subject to easements.
8. Develop policies for addressing troubled easements.
9. In cooperation with the Office of the Attorney General, insure timely and effective enforcement of conservation easements.

### **GOAL III -- Strengthen and Enhance MET's role in land trust assistance and conservation education**

MET has had an important role in helping to establish and maintain non-governmental land trusts throughout the State and in promoting the benefits and values of land conservation.

#### **STRATEGIES**

1. Conduct a needs survey of Maryland land trusts to determine what services MET can provide to improve its Land Trust Assistance Program, and to determine the appropriate role and structure for the Maryland Land Trust Alliance or the need for a new land trust advocacy organization.
2. Evaluate utilization of the Maryland Land Trust Alliance as a communications forum and advocacy organization for land trusts, and the expansion of the MET Local Land Trust Advisory Committee for the same purpose. Determine the best alternative location and strategy for land trust communications for sharing information and experience, cooperative fundraising and legislative advocacy. In order to have significant incentives for private landowners to participate in state and local programs of land conservation, encourage efforts to have in place appropriate tax benefits, both state and federal, for such landowners. Evaluate all options.
3. Increase visibility of MET in publications, educational institutions, websites, libraries, etc.
4. Conduct an annual statewide conference for disseminating information about land preservation options, stewardship methods, Best Management Practices, non-profit land trust management, tax incentives for donations of easements and land, and related topics.
5. Prepare and publish a *Land Conservation Options* pamphlet and web site to provide landowners and the public with information about key State, local and federal land conservation and management options for preserving and managing land, including State and federal support programs for Best Management Practices. Update and expand MET's *Land Conservation Center* web site with such information, with links to web sites for each program.
6. Seek to reinstate POS funding for the Land Trust Grant Fund in order to provide revolving loans and grants to land trusts for the purchase of threatened open space. Award grants and loans and encumber funds in a timely manner.



## **GOAL IV-- Seek and obtain accreditation by the Land Trust Accreditation Commission**

MET is an active participant in the national Land Trust Alliance. Part of the Alliance's program is to help land trusts improve their operations by providing national standards and guidelines for land trust performance. MET should serve as a model of best practices for Maryland land trusts, and for that purpose should be in basic conformance with nationally recognized standards of performance. Accreditation by the Alliance is evidence of that conformance.

### **STRATEGIES**

1. Establish an MET Land Trust Accreditation Committee, including the Director.
2. The Committee should:
  - a. Review the *Land Trust Standards and Practices*, and the *Land Trust Standards and Practices: Interpretation and Application of the 2004 Revisions for Quasi- Governmental Conservation Organizations not Recognized as a Tax-Exempt Organization Under Section 501(c)(3) of the Internal Revenue Code*;
  - b. Review the *MET Organizational Assessment* by the Consulting Group *Solid Ground* (Marc Smiley et.al.); and
  - c. Consult with accredited land trusts in Maryland and those that have submitted unsuccessful applications, and the Land Trust Accreditation Commission, in order to plan for a successful application.
3. Prepare an action agenda and timeline for submission to the Board for completing tasks needed to prepare a successful application for accreditation to the Land Trust Accreditation Commission, and when ready recommend to the Board an application for accreditation to the Land Trust Accreditation Commission. Under direction of the Board, proceed to obtain accreditation by the Commission.

## **GOAL V-- Tell the Maryland Environmental Trust Story to the Maryland Public, the Governor, and General Assembly**

MET has a vital place in the State's efforts for land conservation and preservation of open space during a period of exponential growth and development. The story of that place and its value to the State should be widely shared and appreciated.

### **STRATEGIES**

1. Develop a database of State and local elected and appointed officials and the land preservation community who should receive MET's communications.
2. Communicate through the database and otherwise information about MET's successes in preserving important landscapes, natural, cultural and working lands at a fraction of the cost for purchasing of conservation easements, with articles in state and national news media, an Outdoors Maryland TV program, and in the newsletters and web sites of MET and allied conservation organizations.
3. Add MET website as a link on the websites of other conservation oriented websites.
4. Record and produce testimonials from MET conservation easement donors and cooperative

Local Land Trusts, for YouTube and other social media, and post online and on MET's web site.

5. Plan a periodic Conservation Easement Donor Appreciation ceremony with the Governor and members of the Maryland Board of Public Works.
6. Have prepared and publish *A 50 Year History of the Maryland Environmental Trust*.
7. Prepare materials, including Power Point presentations, for use by Board members and others in providing speaker programs.
8. Publish periodic news and e-bulletins announcing recreational activities sponsored by other groups, putting them in the context of preserved land.

### **GOAL VI-- Strengthen and Improve Governance and General Operations**

One of MET's strengths is that it is governed by a Board of Trustees a majority of whom are volunteers, so that it is not beholden to or subject to the vagaries of periodic changes in the State's political management. While this provides the legislatively-mandated continuity of purpose and program, it imposes a special obligation on the Board to regularly review and ensure that it is maintaining up to date and responsible operations and staff activities, and the facilities and support services needed.

#### **STRATEGIES**

1. Plan for future MET office space needs. Work with DNR and Department of General Services to incorporate these plans into budget and decision-making.
2. Where opportunities exist, streamline Board meetings, and delegate in writing routine decisions and policy implementation to the Director.
3. Review and adopt appropriate recommendations from the *MET Organizational Assessment* (Smiley).
4. Seek new trustees to create a board with geographic representation and backgrounds giving the board a balance of skills and disciplines, all as required by statute, and diversity representative of the State.
5. Regularly review Bylaws.
6. Evaluate MET Board of Trustees committee structure and regularly monitor committees' missions, effectiveness, internal management, duplication and coordination with other committees, making changes to enhance organizational capacity to implement the Long Range Plan. Consider establishment of a Board Communications Committee.
7. Develop a full complement of area representatives and establish their function and expectations.
8. Review and, as needed, add to and reorganize duties of staff so that MET operates with staff responsible for managing the office, financial affairs, communications, public relations, and grant writing, among other duties.
9. Develop training materials for staff, board, area representatives, and volunteers.

## **GOAL VII-- Place MET on a Strong and Secure Financial Footing**

No organization can effectively function without the resources needed for its operations. MET is no exception. Continuing substantial state support is essential to this state agency and its programs on behalf of the people of the state. Recognition of the limits that state finances and the policies of state leadership from time to time may impose on that support, it is incumbent on MET to assess and to the extent appropriate seek additional resources beyond those provided through state appropriations.

### **STRATEGIES**

1. Seek increased budget support from State sources, land conservation partners, and grants from foundations and allied federal and state grant programs to support implementation of MET's Long Range Plan, its current and future programs, and its staffing and other needs.
2. Give particular attention to resources needed for expanded conservation easement acquisition, monitoring, stewardship, fundraising, and preparation and implementation of the Land Conservation Plan focus areas.
3. Explore creation of an endowment to be funded by private contributions, including planned giving.
4. Consider establishment of a Friends of MET or similar organization, including membership dues. Support and work cooperatively with a state-wide 501c3 organization to raise money to supplement MET's program including possible assistance to local land trusts.
5. Establish policies with regard to monetary gifts and other in-kind contributions to MET.
6. Establish resources for grant-writing, fundraising, and similar activity.

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<sup>1</sup> Md. Ann. Code N.R. 3-201 (a).....