

# STEWARDSHIP CALCULATOR FOR CONSERVATION EASEMENTS MANUAL\*

## INTRODUCTION

A wide variety of stewardship costs are associated with holding a conservation easement. A land trust needs to be aware of the costs associated with stewardship and ensure they have policies and plans developed to account for how they will acquire, save and allocate stewardship dollars to protect CE lands in perpetuity. This stewardship calculator was developed to assist Foothills Land Trust, and can be used or adapted by other local or regional land trusts to estimate the annual costs of stewardship. This calculator currently supports cost tracking for 15 CE properties. Once a land trust has more than 15 properties they will likely need to change the way costs are tracked, such as by setting annual stewardship costs based on small, medium and large properties. Or if the land trust would like to continue tracking costs on a case by case basis, a stewardship calculator could be developed using Microsoft Access.

Stewardship Costs are comprised of three components:

1. annual monitoring,
2. maintaining ongoing landowner relationships, and
3. enforcement and resolution of violations.

The calculator does not currently have a line item for legal defense, but it could be added in per property if the land trust so desired. The calculator was developed in excel and includes three main areas: unit costs; CE Properties (labeled 1-15); and total annual costs for the land trust. The land trust enters information into the green cells on the spreadsheet.

## UNIT COSTS TAB

The unit costs tab enables a land trust to enter in the personnel involved in stewardship activities, cost per hour of personnel and if the position is volunteer or paid staff. Personnel involved in stewardship may include staff, volunteers, board members, consultants, legal council or partnering organizations. The cost per unit tab enables the land trust to track the number of volunteer hours and dollars saved through volunteer contribution to the land trust. Tracking the hours a volunteer contributes may be important for grant writing and/or for understanding the long term costs associated with stewardship should the land trust require hired staff to take over volunteer activities. A land trust can add personnel and change costs per hour as they see appropriate. The information in this chart is populated drop down menus in the other worksheets.

Unit Cost Tab

Personnel	Cost/hr	Volunteer or Paid
None	\$0.00	
Staff Member	\$50.00	P
Partner Organization	\$50.00	V
Legal Counsel (P)	\$120.00	P
Legal Counsel (V)	\$120.00	V
Board Member	\$50.00	V
Volunteer	\$50.00	V
Consultant	\$90.00	P

## CE PROPERTY TAB

\*This manual and accompanying Stewardship Calculator were created by the Miistakis Institute with The Foothills Land Trust – it was funded by the Alberta Real Estate Foundation

There are currently 15 tabs where individual CE properties can be entered, enabling a land trust to track stewardship costs relating directly to the individual property. Costs associated with stewardship that could be applied across more than one CE, are included in the total annual costs tab. The table is divided into five categories:

1. Monitoring
2. Landowner Relations
3. Administration Costs
4. Enforcement of violations and amendments to CE
5. Annual Expenses

At the top of the excel spreadsheet on Tab 1, enter the name of the conservation easement (e.g., Jones Conservation Easement) (currently labeled as “????? Conservation Easement”). The following fields occur in the CE Property Tab, information is entered into green fields.

- **Activities/hours field** (to be filled in by land trust)  
A user can enter in the number of hours associated with the first four categories and their listed activities. Activities can be added in as appropriate to the CE, for example, under landowner relations, a user may add in a list of permissions in the CE that may take time for the land trust to monitor, grant permission or clarify with a landowner.
- **Primary responsibility field** (to be filled in by land trust)  
Once the activities are listed for each category and the number of hours filled in, the user determines who is responsible for the activity by selected the appropriate person from a drop down list under the primary responsibility field. The drop down list is tied into the cost per unit; if the user wants to add a new personnel position they must enter the position on the cost per unit tab.
- **Unit Cost and volunteer/Paid Fields** (generated by spreadsheet)  
The unit cost and if the role is undertaken by a volunteer or paid personnel is generated by the spreadsheet, based on the information filled in on the unit costs tab. This information can be changed on the Unit Costs Tab.
- **Frequency in Years Field** (to be filled in by land trust)  
Stewardship activities do not always occur annually, such as enforcement of violations or amendment of a CE. The calculator therefore enables a user to enter the estimated or determined frequency in years of the identified activity occurring (default 1 year). This is important when calculating the annual stewardship costs as the costs are multiplied by the frequency of occurrence.
- **Expenses** (generated by spreadsheet)  
The costs associated with each activity are generated by excel based on the number of hours, the cost per hour of specified personal and frequency of the activity.

Annual Expenses for each property can be filled out as a cash value and frequency of expense can also be added. The spreadsheet calculates the total annual in-kind contribution from volunteers, the total needed for paid personal and total expenses for each property.

**????? Conservation Easement**

Annual Stewardship Costs Template	Time (Hrs)	Primary Responsibility	Unit Cost	Volunteer/ Paid	Frequency (yrs)*	Costs
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**Monitoring of Conservation Easement**

**Staff time**

Pre-monitoring Prep		None	\$ -		1	\$ -
Travel time to site		None	\$ -		1	\$ -
Site Visit		None	\$ -		1	\$ -
Post monitoring write up		None	\$ -		1	\$ -
FLT Staff Review		None	\$ -		1	\$ -
Monitoring follow-up		None	\$ -		1	\$ -
<b>Subtotal</b>	<b>0</b>					<b>\$ -</b>

**Landowner Relations**

**Communication with Landowner**

**Permissions activity for landowner						
		None	\$ -		1	\$ -
		None	\$ -		1	\$ -
		None	\$ -		1	\$ -
Information transfer	0	None	\$ -		1	\$ -
<b>Subtotal</b>	<b>0</b>					<b>\$ -</b>

**Administrative costs**

Records management (posting to website)		None	\$ -		1	\$ -
Communication with board members		None	\$ -		1	\$ -
Co-ordinating volunteers		None	\$ -		1	\$ -
		None	\$ -		1	\$ -
		None	\$ -		1	\$ -
<b>Subtotal</b>	<b>0</b>					<b>\$ -</b>

**Minor Infringements/Ammendments to CE**

Mis-interpretation of easement restrictions, compliance		None	\$ -		5	\$ -
Violations		None	\$ -		5	\$ -
Ammendments to CE		None	\$ -		10	\$ -
Legal Costs associated w ammendment, CE Clarifications		None	\$ -		5	\$ -
		None	\$ -		1	\$ -
		None	\$ -		1	\$ -
<b>Subtotal</b>	<b>0</b>					<b>\$ -</b>

**Annual Expenses**

Expense (\$)	Frequency (yrs)*	Costs
Insurance	1	\$ -
Mileage assocaited with site visit (0.45)	1	\$ -
Air photo's	3	\$ -
Printing costs	1	\$ -
Postage costs	1	\$ -
<b>Subtotal</b>		<b>\$ -</b>

Total in-kind / volunteer	\$ -
Total paid personnel	\$ -
Total expenses	\$ -
<b>Total Cost Required</b>	<b>\$ -</b>

### **TOTAL ANNUAL COSTS TAB**

In the total annual stewardship tab costs are rolled-up for all properties and costs associated with stewardship tasks that apply to all CE properties are tracked. The costs associated with each property, including in-kind volunteer, paid personnel and expenses are rolled up into the total annual cost tab.

Costs that are associated with stewardship for all properties include landowner outreach activities and expenses relating to landowner outreach activities, administration and monitoring.

### **Landowner outreach activity**

The calculator enables a land trust to identify and cost outreach activities, such as workshops, newsletters or actual habitat management projects with landowners. The user enters in the number of hours required by the land trust to undertake these activities, primary responsibility and frequency of the activity (in years). The fields are the same as the CE Property.

### **Expenses**

A land trust is able to include administrative costs, such as office space, computer costs and general overhead into its stewardship budget. In addition expenses associated with outreach activities and monitoring equipment can be included in the stewardship calculator.

The calculator provides a land trust with the total paid personnel, total in-kind volunteer value, and total expenses and enables a land trust to add in a contingency budget (recommended at 5%). In addition the total annual stewardship funds required by the land trust to steward the land are identified and the total annual in-kind contribution.

**Total Annual Costs**

Time (Hrs)	Primary Responsibility	Unit Cost	Volunteer/ Paid	Frequency (Yrs)	Annual Costs
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<b>Conservation Easement Stewardship Costs</b>					
1	????? Conservation Easement	0			\$ -
	<i>In-kind / volunteer</i>	0			\$ -
	<i>Paid personnel</i>				\$ -
	<i>Expenses</i>				\$ -
2	????? Conservation Easement	0			\$ -
	<i>In-kind / volunteer</i>				\$ -
	<i>Paid personnel</i>				\$ -
	<i>Expenses</i>	0			\$ -
3	????? Conservation Easement	0			\$ -
	<i>In-kind / volunteer</i>				\$ -
	<i>Paid personnel</i>				\$ -
	<i>Expenses</i>	0			\$ -
4	????? Conservation Easement	0			\$ -
	<i>In-kind / volunteer</i>				\$ -
	<i>Paid personnel</i>				\$ -
	<i>Expenses</i>	0			\$ -
<b>Subtotal</b>					\$ -

<b>Landowner Outreach Activity</b>						
	Stewardship activity (Habitat management)	0	None	\$ -	1	\$ -
	Newsletter	0	None	\$ -	1	\$ -
	Workshop	0	None	\$ -	1	\$ -
<b>Subtotal</b>					\$ -	

<b>General Stewardship Expenses</b>		Expenses (\$)			
<b>Administration</b>					
	FLT Overhead Costs	\$ -		1	
	Office Space	\$ -		1	
		\$ -		1	
		\$ -		1	
<b>Landowner Relations</b>					
	Workshop expenses	\$ -		1	
	Stewardship activity expenses	\$ -		1	
		\$ -		1	
		\$ -		1	
<b>Monitoring</b>					
	Camera	\$ -		1	
	GPS unit	\$ -		1	
	Computer	\$ -		1	
<b>Subtotal</b>					\$ -

<b>Totals</b>			
	Total Paid Personnel Cost	\$	-
	Total In-kind/Volunteer Value	\$	-
	Total Expenses	\$	-
	Contingency Budget (5% total annual costs)	\$	-

<b>Total Annual \$ Stewardship Fund</b>	\$ -
<b>Total Cost (including in-kind)</b>	\$ -

**Summary**

The stewardship calculator was designed to assist small land trusts in tracking costs associated with annual stewardship costs. Once a land trust understands the costs associated with stewardship it can develop a plan for acquiring the funds to ensure they are able to steward the land in perpetuity. For a description of fund raising options please refer to Module 3: Dedicated Stewardship Funding Training Module of the Alberta Land Trust Alliance series.

It is highly advisable that a land trust review the stewardship calculator at least once a year to assess the accuracy in hours, primary responsibility and frequency of occurrence.

Prepared by Miistakis Institute for Foothills Land Trust

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#### Disclaimer

The Stewardship Calculator and its manual were created for the Foothills Land Trust and may or may not be appropriate for all land trust organizations. It is available for any land trust to use and to adapt for its own purposes. Foothills Land Trust is not responsible for any results achieved or decisions made through the use of the stewardship calculator.