

*Follow-up Report on
A Forum on Land Conservation in Southern Virginia
Chase City, Virginia
July 29, 2015*

*A Special Report
for the Land Trust Alliance,
The Virginia Environmental Endowment,
and Residents of Southern Virginia
Interested in Land Conservation*

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A Follow-up Report to
The Forum on Land Conservation in Southern Virginia
MacCallum More Museum and Gardens
Chase City, Va.
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Executive Summary

On July 29, 2015, 38 people convened in Chase City, Virginia, for a one-day forum sponsored by the Virginia Environmental Endowment and the Land Trust Alliance that was focused on the future of land conservation in southern Virginia. Participants were asked if they thought private nonprofit land trust services were needed to serve southern Virginia and, if so, what services such an organization might provide, what geographic area it might serve, what conservation resources such an organization might protect, whether community and financial support for such an organization existed, whether such an organization could be sustained over the long term, and what resources outside sources might be able to offer in the way of assistance.

The attendees were nearly unanimous in their belief that additional land trust services would benefit land conservation efforts in southern Virginia. Participants in the forum provided extensive feedback in a wide-ranging and open dialogue. Some of the more consistent themes that emerged during the Forum were:

- There are exceptional conservation values in southern Virginia. Water resources, farmland and forest land are particularly significant. In addition, Civil War and other historic resources, scenic byways and other scenic resources, hunting, fishing, and rail-trail outdoor recreation resources, and biodiversity, habitat, and other natural resources are also prevalent and very important in southern Virginia.
- Southern Virginia poses some unique challenges for conservation, including relatively low land values, limited professional services, lack of immediate development pressure, regional cultural attitudes towards conservation, and limited opportunities for fundraising.
- Several state or quasi-state entities have well-developed conservation programs and already serve southern Virginia, including the Virginia Outdoors Foundation, the Virginia Department of Forestry, and the Virginia Department of Historic Resources.
- The Virginia Outdoors Foundation and the Virginia Department of Forestry have become increasingly active in southern Virginia over the past several years. However, there are some conservation opportunities that do not fit the policies and priorities of these agencies. In addition, some landowners prefer to work with local organizations.
- There are several existing local groups that could play a key role, including the Ward Burton Wildlife Foundation, the Ever Green Team, and the Black Family Land Trust. Other nearby land trusts, including the Capital Region Land Conservancy and the Blue Ridge Conservancy, and other conservation organizations, including the Dan River Basin Association and the Roanoke River Basin Association, could potentially help.

- A private land trust could fulfill several critically important roles in southern Virginia. The most important roles would be providing landowners and local decision-makers with education and good, accurate information about conservation. A land trust could also play a catalytic role, encouraging local governments and citizens to develop and implement programs that support conservation. A need may also exist for a private land trust to hold easements that do not fit the priorities or policies of other organizations and agencies.
- Any effort to develop a local nonprofit land trust presence in southern Virginia must be based in southern Virginia and be led by people from southern Virginia. It will not succeed or be self-sustaining otherwise.
- For a private land trust to succeed, it needs strong local leadership, a clear, compelling vision, community support, financial resources, and a long-term commitment by a core group of people.

1. Introduction to the Forum on Land Conservation in Southern Virginia

“It shall be the policy of the Commonwealth to conserve, develop and utilize its natural resources, its public lands, and its historical sites and buildings. Further, it shall be the Commonwealth’s policy to protect its atmosphere, lands and waters from pollution, impairment, or destruction for the benefit, enjoyment, and general welfare of the people of the Commonwealth.”

Virginia Constitution, Article XI, 1950

The Commonwealth of Virginia has been, and continues to be, one of the leaders in private land conservation in the United States. The Virginia Outdoors Foundation, the Virginia Department of Historic Resources, and the Virginia Department of Forestry have taken a leading role in working with private landowners to conserve hundreds of thousands of acres of land throughout the state. These efforts have been complemented by private organizations, which have flourished in many areas of the state. More than 30 private land trusts have formed over the course of the last 25 years and now provide services to much of northern, central, eastern, and western Virginia.

While the pace of conservation in southern Virginia by state agencies has increased since 2007, efforts to establish a strong private land trust presence in southern Virginia have not succeeded for a variety of reasons. Conservation in Southside is particularly challenging for several reasons:

- Property values are generally lower, which means that donors of conservation easements realize comparatively small tax benefits;
- Pre-acquisition costs, bank subordination issues, and limited professional services make the easement process difficult for private landowners in some locations;
- Lack of immediate development pressure means that people are less concerned about land conversion;
- Limited potential exists for fundraising to support private land trust activities; and
- Overcoming regional cultural attitudes towards conservation can be challenging.

The *Forum on Land Conservation in Southern Virginia* was held to explore these issues and determine if the potential exists to move beyond these challenges and create such a private land trust presence.

2. Background and History of Conservation in Southern Virginia

In November 2007, the Virginia Department of Conservation and Recreation and the Virginia Outdoors Foundation hosted the Governors Forum on Land Conservation at the Priory in South Boston, Virginia. More than 100 people gathered to talk about tools and potential for land conservation. Governor Kaine, Secretary of Natural Resources Preston Bryant, Ward Burton, and many others spoke of the need to advance land conservation in southern Virginia, and the opportunities and challenges of doing so.

The Virginia Department of Conservation and the Virginia Outdoors Foundation attempted to establish a joint conservation office in southern Virginia in follow-up to the Governors Forum. The office was to be staffed primarily by an administrative person, with the Department of Game and Inland Fisheries, the Department of Forestry, the Department of Conservation and Recreation, and the Virginia Outdoors Foundation providing professional support on a rotating basis. Despite a strong follow-up effort by several proponents, the plans to create this office in Southside did not coalesce into reality.

The Ward Burton Wildlife Foundation, started by NASCAR great Ward Burton, became an increasingly active voice for conservation in southern Virginia. The Foundation protected The Cove, a 2,000-acre wildlife preserve in Halifax County. In addition, the Foundation began responding to requests from private landowners, and currently holds 17 conservation easements in southern Virginia. However, both Ward Burton and Tom Inge, the Foundation’s program manager, have made it clear that the Foundation does not have the desire or resources to take on more conservation easements, and in fact are seeking to divest themselves of the easements that the Foundation currently holds.

Some significant advances in conservation have taken place between 2007 and 2013. More than 83,000 acres of land in southern Virginia were conserved between 2007 and 2013 (see Table 1 below). The majority of these conserved lands were a result of conservation easements placed with the Virginia Outdoors Foundation and the Virginia Department of Forestry.

Table 1: Conserved Land in Southern Virginia by County:	Acres of Protected Land in 2007	Protected Land as a Percentage of County Land Base in 2007	Acres of Protected Land in 2013	Protected Land as a Percentage of County Land Base in 2013
Patrick	18,869	6.06	20,660	6.64
Henry	4,738	1.93	7,434	3.03
Pittsylvania	3,450	0.55	9,249	1.48
Halifax	9,320	1.75	27,402	5.16
Campbell	3,855	1.19	10,214	3.15
Appomattox	11,924	5.55	15,188	7.06
Charlotte	2,316	0.76	6,640	2.17
Prince Edward	11,678	5.16	17,366	7.67
Amelia	2,787	1.22	19,006	8.30
Nottoway	26,188	12.90	27,377	13.52
Lunenburg	984	0.36	4,461	1.61
Mecklenburg	4,122	0.95	8,496	1.95
Dinwiddie	15,124	4.66	19,226	5.92
Brunswick	6,389	1.75	9,618	2.64

Greenville		70	0.04	1,854	0.96
Total		121,814		204,191	

The amount of conserved land in these southern Virginian counties is comparatively low when compared to western, central, northern, and eastern portions of the state, where conserved lands more typically represent a much higher percentage of the land base.

Still, more opportunities exist in southern Virginia than can be filled by current resources, and the costs associated with unfettered development of rural lands are significant: degraded waters, lost farmland and forest land, and historic landscapes lost to residential or commercial development.

In March 2014, the Virginia Environmental Endowment (VEE) convened a smaller group of interested parties, including representatives from the Virginia Outdoors Foundation, the Virginia Department of Conservation and Recreation, the Virginia Department of Agriculture and Consumer Services, the Land Trust Alliance, The Nature Conservancy, and several others with knowledge of conservation efforts in southern Virginia. The group determined that there was sufficient need to re-start the conversation about conservation in southern Virginia.

As a result, VEE continued to build upon this work in 2015 by contracting with the Land Trust Alliance to host a meeting of parties interested in advancing conservation in southern Virginia. The *Forum on Land Conservation in Southern Virginia* provided an opportunity to examine these questions and explore the potential for creating a catalyst for change.

3. Methodology

The Land Trust Alliance began work on this project in March 2015. The Alliance contracted with Lands Trails and Parks LLC, a Virginia-based consulting firm specializing in services to conservation organizations.

Don Owen, the principal of Lands Trails and Parks LLC, began work in April 2015 by conducting extensive background research on previous efforts in southern Virginia. He also developed an interview protocol and conducted a series of 22 interviews with key interested parties. The purpose of the interviews was to obtain an overview of opinions and ideas about private land conservation in southern Virginia, as well as identify topics, issues and objectives for the agenda for a forum focused on hearing opinions and ideas of local citizens in southern Virginia. Key interested parties included:

- more than a dozen residents of southern Virginia who had expressed interest in conservation
- senior staff and board members of private nonprofit land trusts with service areas adjoining southern Virginia
- members of the Executive Committee of the Virginia United Land Trusts
- current and former staff of the Virginia Outdoors Foundation
- staff of the Virginia Department of Forestry

- representatives of the Ward Burton Wildlife Foundation
- local government representatives from counties or municipalities in southern Virginia, and
- staff of the Virginia Department of Conservation and Recreation

The Alliance’s consultant also worked collaboratively with the staff of the Virginia Environmental Endowment and Land Trust Alliance Southeast Regional Office to develop an agenda and refine the logistics for the *Forum on Land Conservation in Southern Virginia*. In addition, the consultant conducted a site visit to southern Virginia, held several face-to-face interviews, and sent invitations to more than 65 individuals who had been identified as important spokespersons for conservation in southern Virginia, with a specific emphasis on participation by residents of southern Virginia.

4. The Forum on Land Conservation in Southern Virginia

The *Forum* itself was held at the MacCallum More Museum and Gardens in Chase City, Virginia, on July 29, 2015. Thirty-eight people attended and participated in large group and small group exercises designed to solicit their ideas and input about the need and potential for creating a private nonprofit land trust presence in southern Virginia.

The purpose of the meeting, as presented to the attendees, was two-fold:

- To determine if participants believed there was a need for private land trust services in southern Virginia; and
- If the participants believed that private land trust services were needed, to hear participants’ opinions and ideas and begin to frame the discussion about what services a private land trust should provide, what geographic area it should serve, what conservation values should be protected, and what resources would be needed to develop and sustain such an organization over the long-term.

Joe Maroon, Executive Director of the Virginia Environmental Endowment, opened the meeting with a brief history of land conservation in southern Virginia. He touched on several prior events, including the Governor’s Forum held at the Prizery in South Boston, Virginia in 2007, which he and some other participants had attended, and a smaller session held in 2014 at the offices of the Virginia Environmental Endowment in Richmond, Virginia.

Mr. Maroon recalled a meeting with Bob Lee, the former Executive Director of the Virginia Outdoors Foundation, more than a decade ago. In that meeting, Mr. Lee pointed out that while there were many private land trusts in Virginia, none were active at that time in southern Virginia – in essence, southern Virginia was the “hole in the donut.”

Mr. Maroon also highlighted the potential costs of losing agricultural land, forest land, open space, and clean water in southern Virginia, as well as the importance of saving lands that supported two of Virginia’s most important industries: farming and forestry. He noted that while a significant amount of good conservation had taken place in

southern Virginia in recent years, there were many, many more opportunities than current resources could hope to address.

He emphasized that the important land conservation work of the Virginia Outdoors Foundation, the Virginia Department of Forestry, the Virginia Department of Historic Resources, and the Virginia Department of Conservation and Recreation would continue, but that many saw the need for private land conservation as well. The Ward Burton Wildlife Foundation had determined that it did not have the capacity to accept and hold conservation easements in the long term. Further, although some groups had expressed an interest and willingness to step forward, the lack of experience, expertise, and funding had limited their development.

Mr. Maroon concluded his presentation by indicating that the purpose of the *Forum* was to seek the views of citizens from southern Virginia on whether a private land trust was needed, and if so, what resources could be brought to bear to fulfill that need.

Kevin Brice of the Land Trust Alliance spoke briefly to the audience about the work of the Land Trust Alliance, an organization that represents more than 1,700 land trusts across the country. In addition to the Alliance's advocacy work in Washington, the Alliance also had four regional offices across the country, which were focused on bringing resources and expertise to land trusts at the local level. Mr. Brice summarized the Alliance's primary strategic goals as increasing the pace of conservation, improving the quality of conservation, and ensuring the permanence of conservation. He also noted that the Alliance's Southeast Regional Office, based in Raleigh, North Carolina, covered twelve states in the southeastern United States.

Mr. Brice then summarized the essential components of a successful land trust. A successful land trust:

- has a clear, compelling vision to conserve land for a purpose, not just from something
- has strong local leadership
- has strong local community support
- has strong financial backing, and
- has people who are committed to the organization's long-term sustainability, and
- owns land or holds conservation easements as a primary activity, and stewards these land holdings in perpetuity.

Don Owen of Lands Trails and Parks LLC then outlined the different types of land trusts that typically work in rural areas like southern Virginia. He noted that state agencies like the Department of Forestry and Department of Historic Resources held conservation easements; and that the Virginia Outdoors Foundation, a quasi-state organization, held almost 4,000 conservation easements on more than 650,000 acres of land in Virginia, making it one of the largest land trusts in the world. He indicated that there were a number of national land trusts like The Nature Conservancy, the Trust for Public Lands, the National Wild Turkey Federation, and Duck Unlimited, which were active elsewhere

but held few property interests in southern Virginia.

Mr. Owen also highlighted the different types of private local land conservation organizations, ranging from local or regional land trusts that hold conservation easements (like the Blue Ridge Land Conservancy, the New River Land Conservancy, and the Capital Region Land Conservancy, all of which held easements in counties adjoining southern Virginia) to local or regional land trusts that served primarily to educate and inform landowners and the general public about conservation.

Ward Burton of the Ward Burton Wildlife Foundation gave a brief keynote address, emphasizing the tremendous wealth of conservation opportunities in southern Virginia. Ward spoke briefly of the early efforts of the Ward Burton Wildlife Foundation to preserve The Cove in Halifax County and the work that the Foundation had done in the vicinity of Fort Pickett. He concluded by stating that the Foundation had recognized that it could not sustain its effort over the long term, and that southern Virginia needed an organization that could lead the way forward on conservation efforts for the next generation. He pledged the Foundation's support for such an effort.

5. Outcomes and Feedback from the Forum Participants

Mr. Maroon opened the floor up to the participants, asking them to address the following questions:

- Do you think that a private land trust is needed to serve Southern Virginia?
- If so:
 - What services should it provide?
 - What geographic area should it serve?
 - What conservation values – farmland, forest land, historic resources, water resources – should it focus on?
 - Are there local people who would be willing to assume a leadership role?
 - Is there strong community support for conservation?
 - Is there a strong financial support for conservation?
 - Can it be sustained over the long term?
 - What resources – training, expertise, technology, mapping – could other groups provide?

He indicated that the purpose of the forum was to hear the participants' opinions and ideas.

A wide variety of opinions and recommendations were raised during the large group discussion and small group break-out sessions. In addition, numerous suggestions and ideas were posited during interviews and in comments received after the forum. These comments are summarized below, without attribution, under the subheadings of the questions that were posed to the participants. In most cases, comments are paraphrased or combined with similar comments.

Do you think a private nonprofit land trust is needed to serve southern Virginia?

- Yes. Out of the gate, the first need is for an advocate and educator; once that is established, we could build a land trust towards capacity. The most important role of the organization should always be information and education, guiding landowners towards established easement holders.
- Many current landowners in southern Virginia are farmers, and are dependent upon revenues from their land to survive. Tax credits from conservation easements may provide critically important income that will allow farmers to live on their land for the rest of their lives. For many landowners, the Virginia Outdoors Foundation and other state agencies are not a good fit. We need an alternative that fits the need of southern Virginia.
- We already have an existing land trust in southern Virginia: the Ward Burton Wildlife Foundation (WBWF). The first thing WBWF always does is steer landowners to the Virginia Outdoors Foundation or the Virginia Department of Forestry. However, there are always landowners who want local connections or whose conservation proposal doesn't fit with VOF or DOF. WBWF initially tried to help these landowners, and is still the only private nonprofit organization in southern Virginia that has accepted conservation easements. However, WBWF was flooded with easements and had to stop. There clearly is a need, but WBWF has determined that it cannot respond to the need on its own and it is not able to accept the responsibilities for perpetual stewardship. WBWF is willing to work with anyone, but it needs help and funding. WBWF is interested in mapping out a plan with Ever Green or another group to help with the ACUB Program and monitoring the Foundation's existing conservation easements.
- Southern Virginia is different than the Chesapeake and Piedmont, which are well served by private land trusts. Southern Virginia has a different agricultural history, based on tobacco and forestry. The biggest role that a private land trust could play in southern Virginia would be educating landowners on good conservation practices.
- The Department of Forestry (DOF) conservation easement program is relatively young, and although DOF has been steadily increasing its efforts, there is no way it can handle the demand without additional resources. DOF is accepting 25% of the easements and 30% of the acreage put into easement in southern Virginia.
- VOF has been active in the eastern part of southern Virginia: Lunenburg, Prince Edward, Chesterfield. VOF has accepted more easements there recently than in most other areas in Virginia. The real emphasis has been on working lands – agriculture and forestal resource values. An organization that would help landowners understand conservation and guide them to VOF would be helpful.
- What is needed is a local land trust that can educate landowners in all the tools of conservation, both permanent and temporary. There are other tools besides

conservation easements: forestry land use assessments, agricultural use programs, and water quality protection programs. If there's a need for anything, it's for an organization that can provide landowners with information and education.

If so, what services should a private nonprofit land trust provide?

- An ideal land trust would be one that has good relationships with local governments and state agencies; has good outreach and peer-to-peer local outreach; works with and educates attorneys and CPAs; works with good local appraisers; has a strong stewardship and legal defense program; has an attractive name; and has a manageable geographic region and defined core service area.
- Land trusts do much more than just hold conservation easements. Landowner education is perhaps their most important function.
- Having a state agency like the Virginia Outdoors Foundation (VOF) that is willing to accept the sometimes onerous responsibilities of stewardship is important. If a local land trust or conservation organization could serve as the sales division for VOF, that might be a more successful model in southern Virginia.
- The Dan River Basin Association (DRBA) provides advocacy, outreach, and education on water quality. As a result of the coal ash spill on the Dan, DRBA has \$90,000 to educate landowners and citizens about river conservation. They could be contacted to see what services they might be able to provide.
- The Black Family Land Trust is a natural fit to address some of the region's land conservation needs. They operate in North Carolina and Virginia, with a mission of helping African American families conserve their land. The Black Family Land Trust's focus is on agricultural land and the historic connection of African American communities to their agricultural heritage.
- The Ever Green Team is now an official entity that has been in business for three years. They have applied for 501(c)(3) status, and are slowly building their board capacity and internal operations.
- The Roanoke River Basin Association has expressed some interest in anything that will help the watershed. The Association may qualify as a co-holder of easements.
- What is needed more than anything is for a land trust to communicate with landowners, media, general public, elected officials, and decision makers, and "make the case" for conservation.
- Southern Virginia needs a land trust that holds conservation easements and deed restrictions, too.

- A private non-profit land trust is needed in southern Virginia to:
 - educate local governmental officials about existing financial incentives and programs for conservation (especially the importance of programs to protect water quality)
 - educate local governments about the effects of conservation on local tax base
 - communicate with Farm Bureau, Farm Credit, Economic Development agencies
 - advocate for conservation, and work with local governments and get conservation goals and aspirations included in comprehensive plans
 - explain to the public why conservation values are important
 - work with and educate landowners about VOF, DOF, and VDHR, and facilitate placing conservation easements with VOF, DOF, and VDHR (VOF and DOF are doing more work in Southern Virginia than anywhere else)
 - communicate with farm suppliers, tractor dealers, soil and water districts, farm bureaus, private foresters – word is getting out, we need to keep and build on the momentum
 - educate tax brokers and lawyers about how conservation easements work
 - talk about all conservation programs, and connect landowners with the various conservation options, both temporary and permanent
 - facilitate landowner-to-landowner communications about conservation, why it's important, and what the benefits are
 - accept and steward conservation easements
 - serve as the hub of the wheel, connecting landowners, local governments, and citizens with various conservation program options
 - educate the public and tie in conservation to the economic development of the region
 - help with economic development and conservation around Fort Pickett, which is bringing new jobs, residents, restaurants, and hotels
 - convey the message to farmers: conservation tax benefits can help you hold on to your farm and add to it
 - talk about the sustainability of farming
 - hold easements, but need \$ for stewardship
 - focus on non-Chesapeake Bay watersheds

- What is needed is an organization or mechanism that will encourage landowners to talk to VOF, DCR, and other groups – an organization that can put a farmer in need of advice in touch with a group that can help with a particular program or issue.

What geographic area should a private nonprofit land trust serve?

- There is a very high percentage of conserved land around Fort Pickett, thanks to the Army Compatible Use Buffer (ACUB) Program. A private land conservation effort could start by building upon this program.

- A private nonprofit land trust should start small, and use current concentrations of conserved properties around the Edmunds property, The Cove, and Fort Pickett as focal points. Eventually, a local land trust should cover all 12 counties in southern Virginia, including Pittsylvania, Halifax, Dinwiddie, Brunswick, Mecklenburg, Charlotte, Martinsville, Henry, and Greenville.
- Land trusts should be organized by watershed.
- Land trusts should be organized by county. Ideally, every county should have a land trust if there was adequate funding and strong local leadership and involvement. Some areas in Virginia and other states even have multiple land trusts in one county.
- In southern Virginia, with limited resources, it would make sense to start where the physical and financial resources are, establish a strong base of operations, and then build out from there. Ward Burton Wildlife Foundation started with a relatively narrow vision (focusing on wildlife) but expanded that vision to include water quality, forests, and farms. One model would be to start small and stay focused on one geographic area.
- The Capital Region Land Conservancy (CRLC), which was established ten years ago, serves a seven-county area that is generally in and around Richmond, just to the north of southern Virginia. Henrico and Chesterfield Counties are part of CRLC's service area. CRLC only holds three easements at present (including one with the local Soil and Water Conservation District), but serves as local advocate for conservation directing potential easement donors to the Virginia Outdoors Foundation and other agencies. There is no need for a southern Virginia group to cover Powhatan or Chesterfield, as these areas are already served by Capital Region Land Conservancy. CRLC also is doing some work in the northern parts of southern Virginia: Dinwiddie, Amelia, Caroline, and Petersburg. However, the potential is still largely an unknown. It may be possible for CRLC to expand its service area somewhat, if that becomes desirable.

What conservation values should a private nonprofit land trust in southern Virginia focus on?

- Southern Virginia is fortunate to have a healthy natural resource base – clean water, outstanding scenery, and good farmland and forest land. Some of the communities of southern Virginia, like Halifax, are working hard to promote and protect these resources.
- Conservation values in southern Virginia are pretty straightforward: water, farmland, and forestry. In addition, some of the most biologically diverse and healthy streams in the state are located in southern Virginia. Historic resources

- are important in more site-specific geographic locations in southern Virginia (such as Civil War battlefields) as well.
- Conserving farmland and forest land should be the primary goal of conservation in southern Virginia. Everything else is secondary.
 - Conservation efforts should emphasize agriculture, forestry, and water; also, to a lesser extent, heritage and history, open space and viewsheds, and traditional recreation values of hunting and fishing are important.
 - One way to look at it is that southern Virginia is one of the few areas of the state with large land holdings and significant timber and farmland conservation values. From another perspective, there's not much pressure to develop. Many of the large timber holdings are held by timber companies and won't be sold mid-rotation.
 - Trails like the Tobacco Heritage Trail, the Roanoke River Rail Trail, and the High Bridge Trail, could be important recreational amenities and economic attractions. Scenic rivers and water resources like the reservoir provide a similar opportunity.

Are there local people who would be willing to assume a leadership role?

- The Ward Burton Wildlife Foundation started initially guiding landowners towards state agencies like VOF or DOF. However, many southern Virginia landowners wanted an organization with local connections. There also were a number of projects that didn't fit VOF's standards. As a result, the Ward Burton Wildlife Foundation currently holds 17 easements, many of which are near Fort Pickett. The workload, however, is too much for the organization. The Foundation has stepped back and is no longer accepting easements, even though the demand is clearly there.
- Ever Green is interested in participating. Ever Green has a core Board of Directors, and has taken the initial steps to seek non-profit status. Ever Green has been in existence for three years and is looking for co-holders so that they can begin taking conservation easements. The organization has accepted responsibility for monitoring and stewarding deed restrictions held by Ward Burton Wildlife Foundation on four properties near Fort Pickett. Ever Green is looking for help, training, advice, and mentors. Ever Green has not decided yet whether they want to focus on a smaller area, such as the area around Fort Pickett, or try to serve a larger area
- The Roanoke River Association currently holds and monitors seven easements, although their primary emphasis is landowner outreach and education, particularly outreach to the general public through family programs.

- The Virginia Department of Agriculture and Consumer Services (VDACS) Office of Farmland Preservation has a purchase of development rights program that provides matching state funding for 56 easements in 15 localities across the state. Currently, VDACS staff have worked with localities in southern Virginia, but no easements have yet been secured in southern Virginia.
- There are many people in southern Virginia who have actively supported conservation for many years. They have consistently spoken up for conservation for years, in both public and private forums.
- Yes, there is a clear need for a local land trust presence, but southern Virginia needs its own local champions – people like Ward Burton or Shelton Miles – to explain to their neighbors and fellow southern Virginians what conservation means for their future and their children’s future. The message has to come from here, not from “away.”

Is there strong community support for such an organization?

- There is a hesitancy to deal with government agencies. It is a “tough sell” in southern Virginia. The best way to reach landowners is through conversations with other landowners.
- Community support can be galvanized through a variety of grassroots sources: through Chambers of Commerce, “The Cove” gatherings, Young African American Gardeners (the largest concentration of rural African American landowners is right here in Southern Virginia). There also is a large urban population that hunts and fishes here.
- Some counties and communities, like Halifax, are increasingly recognizing the importance of conserving land for agriculture, tourism, forestry, and water quality.
- The Extension Service could play an important role. So could the Water Districts.
- The Virginia Tourism Corporation could be an active partner. It offers workshops in agritourism and recreation, and promotes the economic advantages of agriculture and tourism.
- Agricultural equipment providers and farm supply stores also could play an important role, since they know every farmer in their service area.
- Virginia Tech has developed a Forest Landowner Education website (www.forestupdate.frec.vt.edu) developed through the Cooperative Extension Program. The Forest Landowner Education Program provides short courses and workshops in everything from managing small woodlots for conservation to estate planning and family trusts. Dr. Ed Jones is the key contact.

- It's critical to keep in mind that conservation efforts also have to be consistent with local government plans. People need to make sure conservation measures are incorporated into county comprehensive plans.
- Scenic River groups may have a role to play.
- The Virginia Department of Forestry has developed the best methodology: bring local easement donors together, and let landowners who have donated easements tell the story to those that haven't.
- The message has to come from local southern Virginians. If someone shows up in a suit and tie from Richmond, it almost doesn't matter what they say. They won't be heard.
- The best kind of promotion has been word-of-mouth, from landowner to landowner, friend to friend. Also, groups like the farm bureau extension service and agricultural development officers have been promoting easements in some areas. More than 60 people, most of them farmers, recently attended a Farm Bureau meeting in Nottaway organized by Trey Davis, a trusted representative from the Farm Bureau.
- One of the biggest issues is that people don't perceive the land as being threatened by development. There's no demand for housing or commercial development, and as a result, no significant value for conservation easements. You need a threat, an immediacy, to convince the families who have owned their property for generations.
- People in southern Virginia believe in and will support the mission of resource conservation, provided it is framed in terms of working lands and hunting and fishing. They are conservationists, not environmentalists.

Does the potential exist for strong local financial support for such an organization?

- Money and conservation are tied together. We don't have land trusts in every county in southern Virginia because land values are low, and placing a property in conservation easement costs money. Money allows land trusts to survive in other areas, but not in southern Virginia.
- The Army has realized that Fort Pickett is critically important to their mission. Fort Pickett is a 50,000-acre military base; and the ACUB program provides up to \$3 or \$4 million per year to protect additional lands around the base. Fort Pickett has spent more than \$10 million to conserve land in areas around Fort Pickett through the Army Compatible Use Buffer (ACUB) program. If you want a land trust with a strong financial backing, Fort Pickett is key.

- The typical model of a land trust may not work in southern Virginia. Fundraising is a challenge. An organization may have to expand the model, and do other projects, like wetlands mitigation banking.

Can such an organization be sustained over the long term?

- A local land trust in southern Virginia needs to:
 - be financially strong; there's no point otherwise
 - have strong leadership, who are committed for the long term
 - have a strong internal organization
 - be careful with co-holds, as some entities may have different goals and objectives, which makes things difficult down the road; co-holds sometimes can work well if there are clear easement terms and clear understandings of responsibilities for stewardship and enforcement
 - be local – the energy has to come from within for an organization to sustain itself over the long term.
 - acknowledge that it takes time to develop trust in the community (sometimes, conversations with landowners take many years); and
 - continue to point landowners to VOF and DOF (however, there may also some value in holding easements).
- Ideally, a land trust in southern Virginia would start small and not hold easements, but promote easements held by DOF and VOF. A land trust won't succeed over the long term if it starts from the "outside" or can't be self-sustaining with local support.
- It could be valuable to provide good training for local attorneys and professionals, so that they could work more effectively with landowners and existing easement holders. It may also help to provide education, outreach, and training for local farm bureaus and foresters.

What resources – training, expertise, technology, mapping – could other groups provide?

- Outside assistance could come in the form of help with a business plan and strategic direction; mentorship (VAULT could help); funding from a coal ash settlement fund; funding from the Virginia Tobacco Commission; media and marketing of the economic benefits of private land conservation (with an emphasis on promoting agricultural tourism and protecting water supply); and funding from private philanthropy, such as the Virginia Environmental Endowment.
- The Blue Ridge Land Conservancy (BRLC) serves the Roanoke area and adjacent counties. BRLC is an accredited land trust that currently holds and stewards 45 conservation easements. In addition, BRLC focuses on landowner outreach and education, and often facilitates communications between landowners and the

Virginia Outdoors Foundation. BRLC would be willing to provide some mentoring assistance, if asked.

- Ever Green needs money and training – as much as it can get. If it had more of both, it could be doing a lot more to conserve land.
- The following resources are needed:
 - seed money, since southern Virginia does not have a lot of financial resources
 - funding for operations, but also for stewardship
 - funding to assist landowners who are interested in placing land in conservation easement but do not have the cash resources to do so
 - mentors (Ward Burton Wildlife Foundation learned about conservation easements mostly from Conservation Partners)
 - expertise, mapping, brochures, and other information for landowners (all of which VOF, DOF and DCR could provide)
 - assistance in convening neighborhood meetings with agricultural bureaus, farm credit, foresters
- We need help:
 - determining which resources are most important to protect by developing an inventory of resources, a proactive work agenda, and a strategic focus
 - evaluating the willingness and capacity of Ever Green to serve all or a portion of what's needed for local land conservation in southern Virginia
 - finding training, assistance, and mentors
 - coordinating with other local land trusts
 - seeking local government buy-in
 - enlisting the help of pioneers who would be willing to lead the way, and convey the value of conserving land to others in the community
- LTA and VEE should sponsor a series of outreach meetings for landowners, with current landowners who have easements on their property as speakers

6. Next Steps

After the *Forum*, the Alliance and Virginia Environmental Endowment sought input and comment from participants, as well as others interested in advancing conservation in southern Virginia. This report was circulated in draft form for review and comment, and was revised and published in final form in November 2015.

The following steps have been identified as possible purposeful steps that would continue to advance the conversation about conservation in southern Virginia:

1. Hold follow-up meetings with key local groups and individuals
2. Determine if local support, leadership, and financial resources exist for creation of

- a new land trust (or expansion of the services provided by an existing organization)
3. Seek input from the citizens, local governments, and communities of southern Virginia that might be served by a private land trust
 4. Meet with VOF, DOF, VDHR, VDCCR, Ward Burton Wildlife Foundation, Black Family Land Trust, and other interested conservation organizations to define complementary roles and responsibilities
 5. Meet with local lawyers, appraisers, and CPAs and develop initial relationships
 6. Conduct a preliminary inventory of resources to be protected (possibly with assistance of Virginia DCR and VOF)
 7. Develop clear, compelling vision statement, strategic plan, business plan, and internal organizational procedures, using the Land Trust Alliance's *Standards and Practices* as a guide
 8. Define geographic area; determine what area a land trust could serve effectively
 9. Seek local funding, from community foundations, corporate sources like the Virginia Tobacco Commission, coal ash settlement funds, major donors, and other sources
 10. Seek funding for stewardship and enforcement before accepting property interests
 11. Seek outside mentoring, training, technological expertise, and financial support
 12. Determine if all necessary components (local support, local leadership, financial resources, mentoring, training and mentoring) are sufficient for creation of a new land trust.

In addition, the Land Trust Alliance and the Virginia Environmental Endowment would entertain requests for additional assistance that would advance land conservation in southern Virginia, if participants and other parties in the region are interested. This assistance might take any number of forms, including technical assistance in providing effective, locally based education and outreach programs to educate landowners and the general public; workshops and training in the full range of land trust responsibilities identified in the Land Trust Alliance's *Land Trust Standards and Practices*; and organizational assessments and other tools that would help local groups work with agency partners and each other to develop successful, sustainable approaches to land conservation in southern Virginia.

Appendix B

Watershed Integrity Model

Conservation Vision, Watershed Integrity Model - Southside Region

The Virginia Watershed Integrity Model was developed to show the relative value of land as it contributes to watershed or water quality integrity. As development pressure continues across the state, remaining resources are being irretrievably lost to development. The Watershed Integrity Model represents important terrestrial features that should be conserved for water quality integrity based on the best available data.

The Virginia Department of Conservation and Recreation Division of Natural Heritage (DCR-DNH) collaborated with the Virginia Department of Forestry (DOF) and Virginia Commonwealth University Center for Environmental Studies (VCU-CES) in the development of the Watershed Integrity Model.

Legend

- Southside Virginia
- Jurisdictions
- Conservation Easements
- Streams
- Water Bodies

Conservation Lands

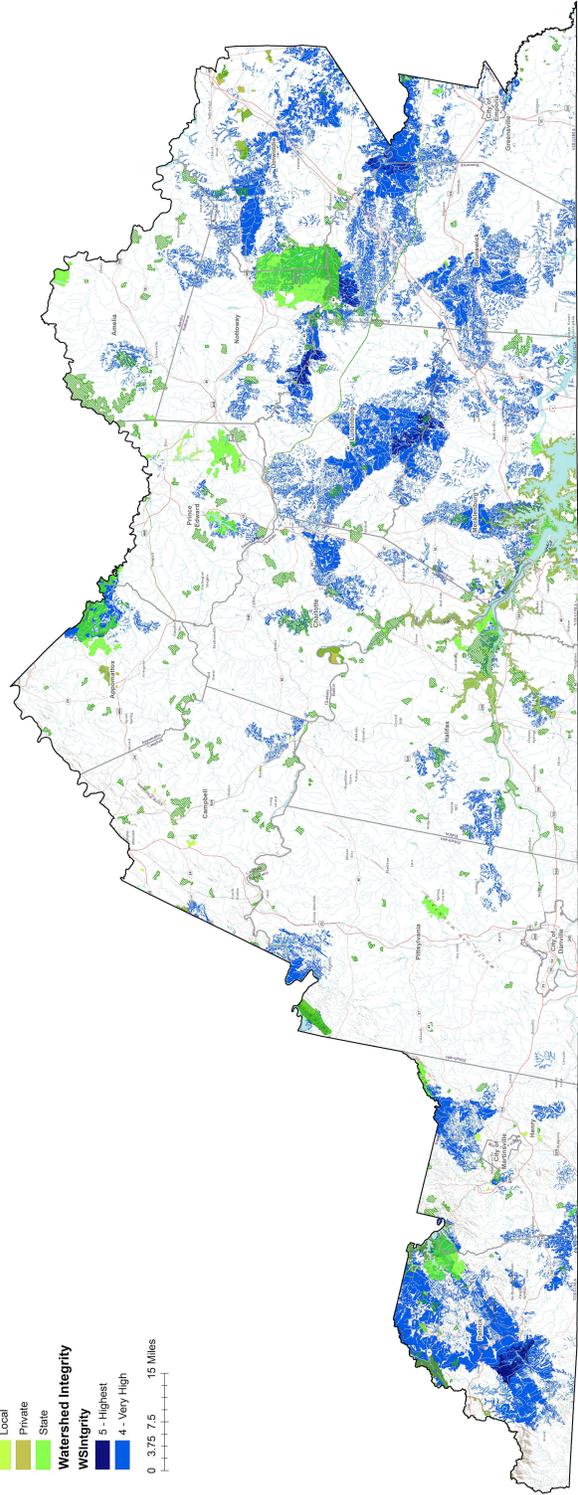
- Federal
- Local
- Private
- State

Watershed Integrity

WSIntegrity

- 5 - Highest
- 4 - Very High

0 3.75 7.5 15 Miles

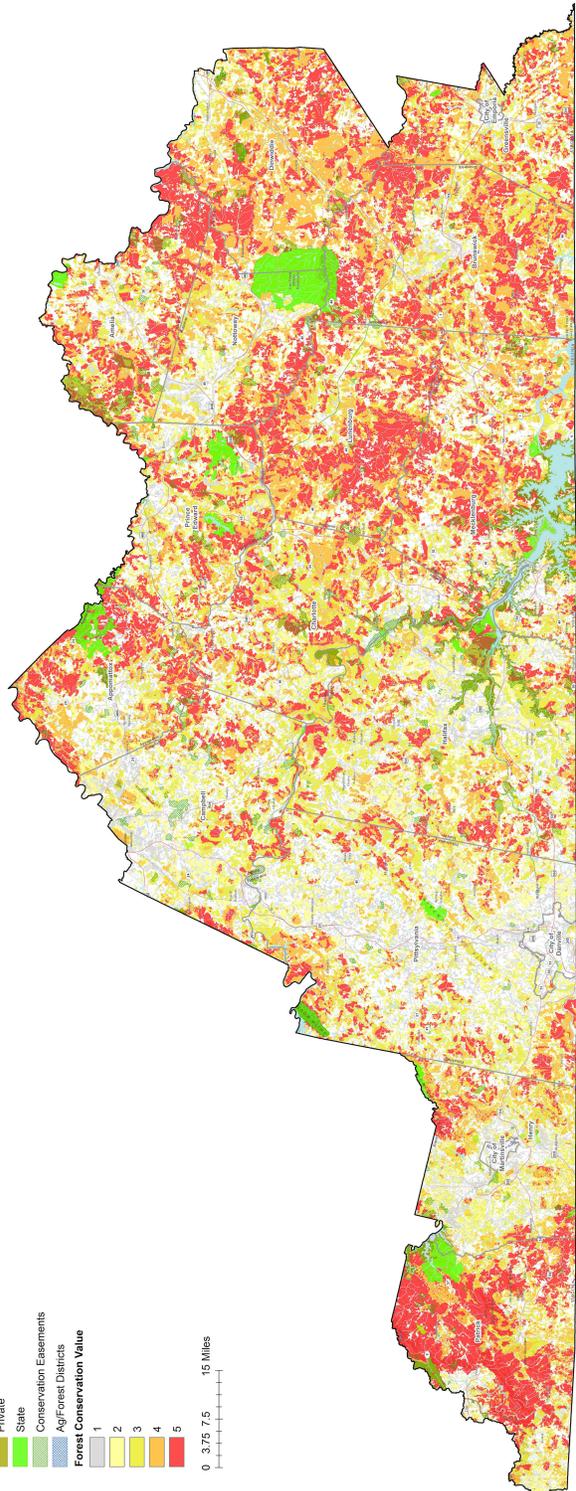
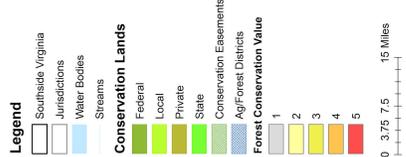


Appendix D

Forest Conservation Value Model

VA DOF - Forest Conservation Value

The Virginia Department of Forestry has established a relative Forest Conservation Value (FCV) for all of the forestland in the state. This FCV ranking is based on the level of benefits provided by a particular area of forest in combination with the level of threat the area faces from conversion to another land use, primarily to development. The FCV map divides the state's forestlands into five categories, the Virginia Department of Forestry (VDOF) has identified categories 4 and 5 as having high forest conservation value. While all forests provide a range of benefits and the threat of forest conversion is widespread, the VDOF recommends that these high conservation value forests be given priority in land conservation efforts such as donated conservation easements, PDR programs, or Ag-Forestal Districts.



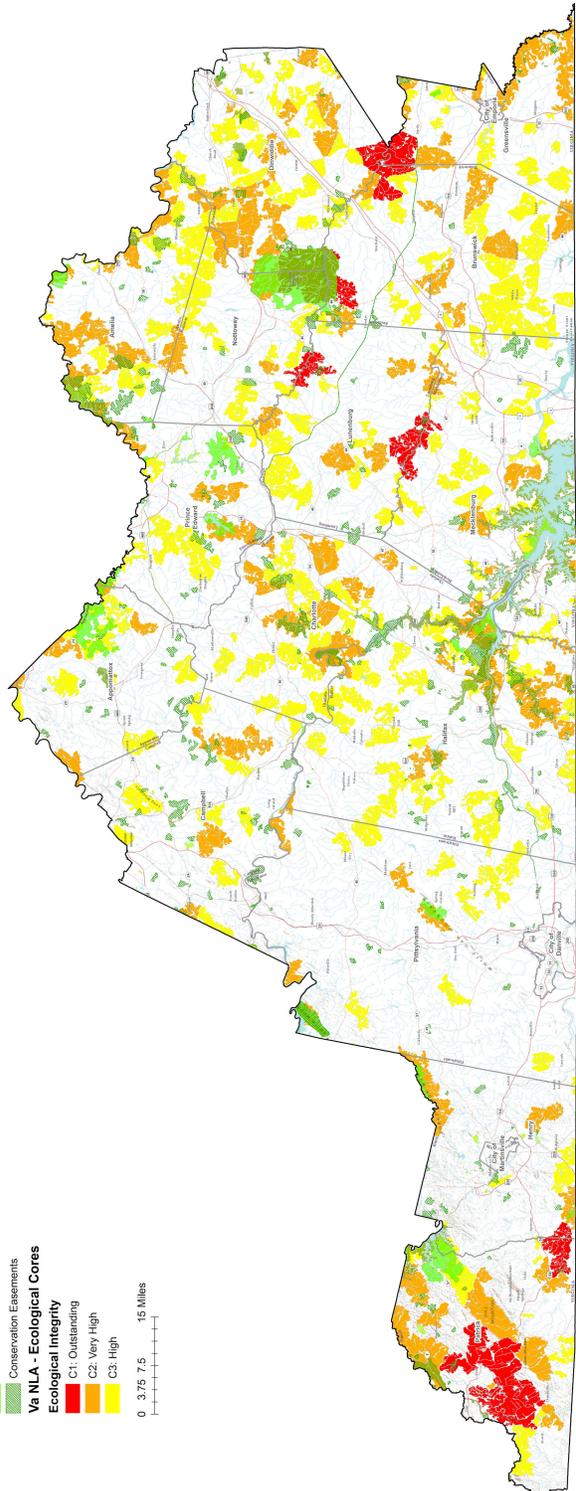
Appendix E

Natural Landcape Habitat Assessment

ConservationVision, Virginia Natural Landscape Assessment Model - Southside Region

Developed by DCR's Natural Heritage Division, the VaNLA is a landscape-scale GIS analysis for identifying, prioritizing, and linking natural habitats in Virginia. It identifies and connects the most important natural, unfragmented lands based on considerations of biological and ecological value and integrity.

- Legend**
- Southside Virginia
 - Jurisdictions
 - Streams
 - Water Bodies
 - Conservation Lands**
 - Federal
 - Local
 - Private
 - State
 - Conservation Easements**
 - Va NLA - Ecological Cores**
 - Ecological Integrity**
 - C1: Outstanding
 - C2: Very High
 - C3: High
- 0 3.75 7.5 15 Miles



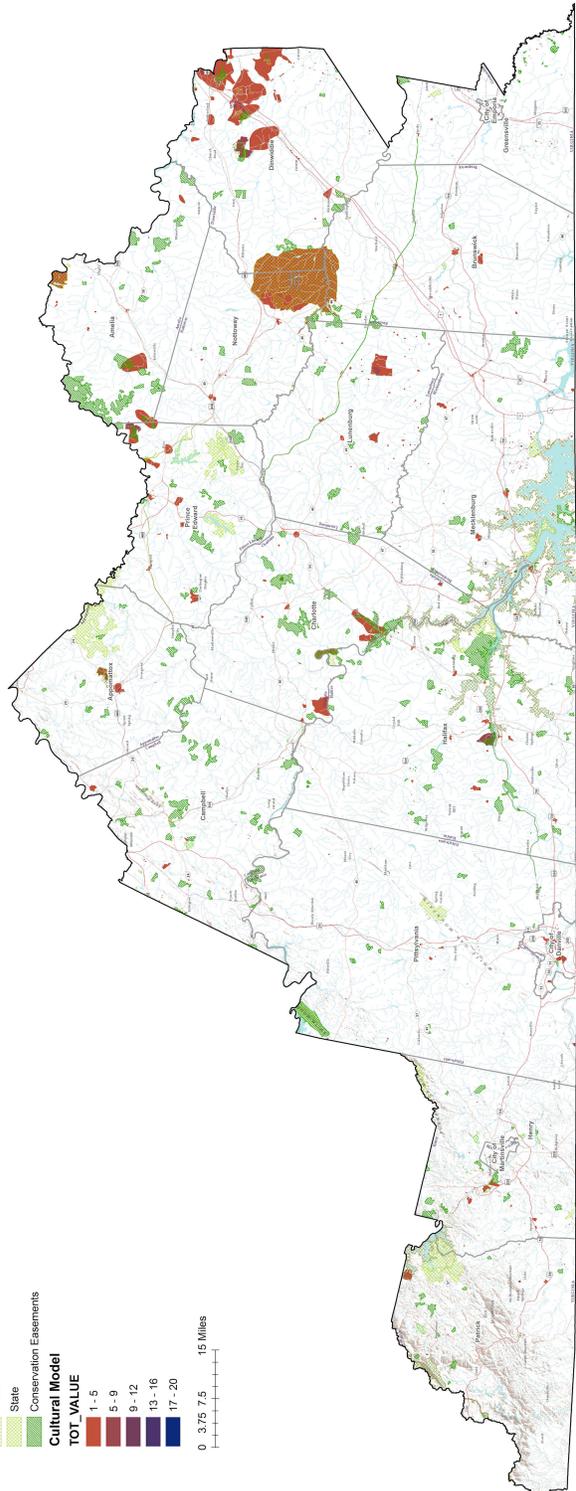
Appendix G

Cultural and Historic Resources Model

ConservationVision, Cultural Model - Southside Region

The objective of the Cultural Model is to map the relative cultural value of lands in Virginia. DCR's Natural Heritage Division collaborated with the Virginia Department of Historic Resources in the development of this model in an effort to help promote the mission of DHR "to foster, encourage, and support the stewardship of Virginia's significant historic, archaeological, and cultural resources". DHR was used as the expert source for model parameter weighting and as the data sources.

- Legend**
- Southside Virginia
 - Jurisdictions
 - Streams
 - Water Bodies
- Conservation Lands**
- Federal
 - Local
 - Private
 - State
 - Conservation Easements
- Cultural Model**
- TOT_VALUE**
- 1 - 5
 - 5 - 9
 - 9 - 12
 - 13 - 16
 - 17 - 20
- 0 3.75 7.5 15 Miles

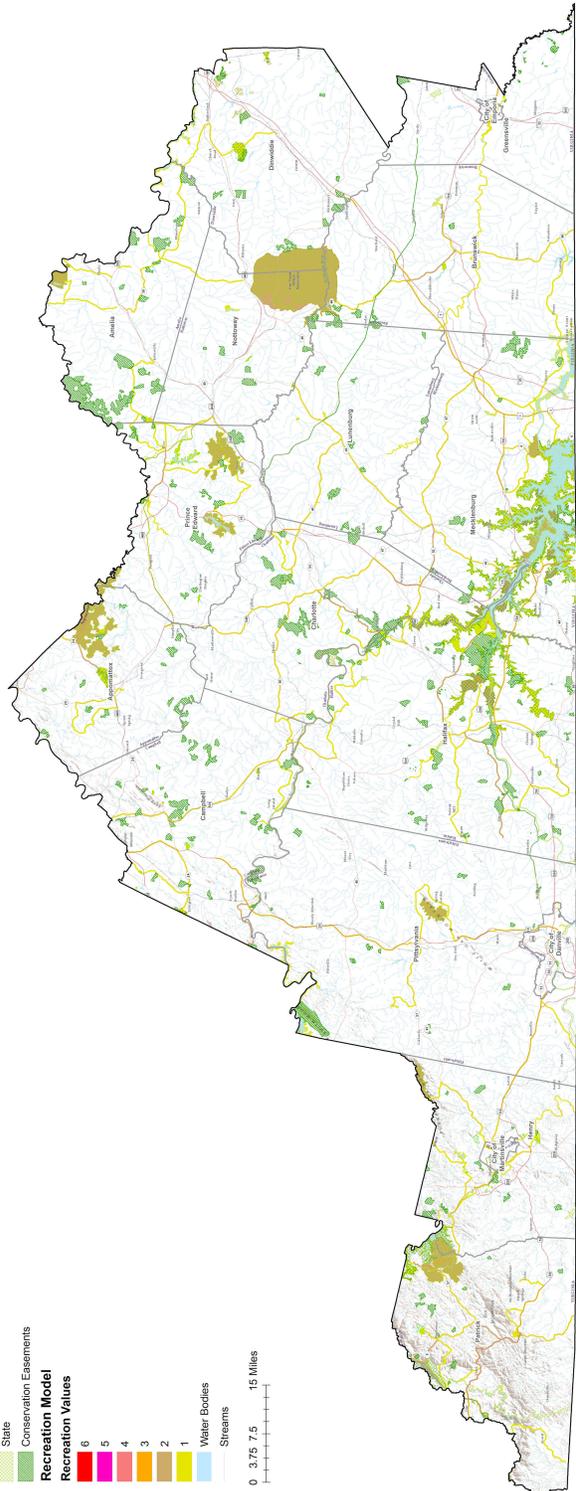
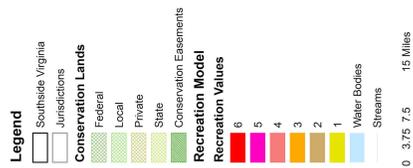


Appendix H

Recreation Model

ConservationVision, Recreation Model - Southside Region

DCR's Natural Heritage Division developed the Virginia Recreation Model in an effort to map the existing public recreation lands in Virginia that are owned or managed by Federal, State or Local Governments. As development pressure continues across the state, the need for natural resource based recreation areas will increase. The development of a GIS model to delineate where recreational opportunities currently exist may serve as a guide to local government, consultants and developers in planning for and acquiring property for recreational use. The model also serves as part of a larger infrastructure plan, which aims to model where Virginia's conservation priorities are located to facilitate an integrated approach to planning and development.



Appendix I

List of Attendees

Forum on Land Conservation in Southern Virginia

July 29, 2015

Organizers:

- Kevin Brice – Land Trust Alliance
- Virginia Frediani – Virginia Environmental Endowment
- Joe Maroon – Virginia Environmental Endowment
- Don Owen – Land Trails and Parks LLC

Attending:

- Darnell Abbott – Abbott Farm Supply
- Walker Abbott – Abbott Farm Supply
- Ebonie Alexander – Black Family Land Trust
- Suzan Bulbulkaya – Department of Conservation and Recreation
- Ward Burton – Ward Burton Wildlife Foundation
- Sherry Buttrick – Virginia Outdoors Foundation
- Rupert Cutler – Blue Ridge Land Conservancy
- Janet Early – Early & Early
- Ed Early – Early & Early
- Carl Espy – Town of Halifax; Roanoke River Rails to Trails
- John Eustis – New River Land Trust
- Derek Fellows – Hawthorne & Hawthorne P.C.
- Jason Fisher – Extension Service Halifax County
- Sharon Flowers – Hawthorne & Hawthorne
- Kristen Gee – Attorney
- Missy Neff Gould – The Nature Conservancy
- Hank Hartz – Virginia Outdoors Foundation
- Robert Hawthorne – Hawthorne & Hawthorne P.C.

- Tom Inge – Ward Burton Wildlife Foundation
- Dan Jones – Capital Region Land Conservancy
- Jane Myers – Capital Region Land Conservancy
- Tessa Neal – Citizen
- David Perry – Blue Ridge Land Conservancy
- P.K. Pettus – Citizen
- Michael Pugh – Ever Green
- Phillip Reed – Virginia Outdoors Foundation
- Sarah Richardson – Virginia Department of Conservation and Recreation
- Mike Santucci – Virginia Department of Forestry
- James (Jaycee) Shaver – Virginia Army National Guard at Fort Pickett
- Tom Smith – Virginia Department of Conservation and Recreation
- Andrew Sorrell – Virginia Department of Agriculture and Consumer Services
- Sandra Tanner – Virginia Tourism Corporation