<u>**Saving Special Places 2018 – Communicating With Landowners**</u>

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I. <u>**Landowner Inquiries**</u>

Mostly a conservation easement discussion, donation or sale, but a landowner can consider a fee sale, full or bargain value, as ensuring the land's protection. Inquiries may be for both desirable land as well as land that would not be a fit for your organization's goals.

<u>**Most Important**</u> – you must immediately establish a positive, calm, and friendly atmosphere, and demonstrate trustworthiness over the time of interaction; they need to <u>*like*</u> you. Do you work with someone who turns you off if you don't need to? The mission is to help them to achieve ***their*** desires.

1. For all
    a. Do they know what they want?
    b. Do they understand their options, even if they want to sell fee?
    c. Do they understand conservation easements?
    d. ***Let them talk*** – about their land, but insert opportunity for the personal as well: family, careers, travel, etc.

2. Call-ins
    a. Get property location – address, tax map & lot
    b. Get their contact information
    c. Be happy to meet with them *wherever*
    d. If a meeting, set a date & place

3. Walk-ins
    a. Putting them at ease is a *priority* - welcome them into your "home", introduce to others present
    b. Same as Call-ins above
    c. If maps available – GIS, Google Earth or maps, tax maps – look at them together. If able to, show them the various imageries – topo, aerial, WAP, wetlands, boundaries, etc. This can get the landowner into their property, & can illuminate possible errors in mapping from the start.

II. <u>**Initiating Contact**</u> - Landowners of properties in targeted areas (cold-calls)

<u>Before calling</u>:

1. Great to have a mutual contact to introduce you or the idea of conservation to the landowner.
2. ***Be prepared*** – collect everything that you can find beforehand: tax cards & maps, Ad Valorem value, natural resources, adjacent land use/conservation lands, likely project partners [towns, granting orgs.])
3. Event Booths – exposure at a public event can motivate a landowner (believe it or not- it has happened)

It is hard to call – intrude on – someone out of the blue. There's nothing for it: just jump in & make the call

<u>The call</u>:

1. Introduce and express your organization's awareness of their special property & interest in protecting it.
2. Ask if they have ever considered having it protected with a CE or selling it, or would they consider such
3. If they do not hang up, discuss the property as above call-ins and encourage a meeting

Cue in on landowners mindset – some are ready to go, some are thinking about it but unsure, some just curious, and some have wildly unrealistic ideas of financial realizations. Any of these can quickly be turned off, particularly the unsure – but they can become motivated to move off the fence & forward as well.

Cautions –

1. Avoid estimating expected sale values, CE or fee. If feeling pushed, & town assessment is known, you may discuss ranges/rules-of-thumb, but stress appraisal requirements & how they can compare or vary from town values, as well as how CE's compare to & vary from market values
2. Delay discussing details of project transactional costs to serious discussions during a meeting, but don't be evasive if questioned
3. If it is an undesirable a property, maintain good will: instead of saying no immediately, take their contact info & let them know that you will get back to them after checking on some things & with others. This gives time to prepare for a 2nd more mindful conversation of why the property would be an unsuitable match for the organization and suggest some alternatives they may wish to investigate; have contact information for them to pursue other avenues. Just helping in their search is good Karma for another day.

III. The First Meeting

Some landowners are very low-profile & tentative/unsure about it all, others like more attention, a bit of fanfare. ***Be prepared*** – you do not want to miss covering an item with a landowner; bring all materials at your disposal.

1. Where
   a. Best on their turf: home &/or on the property – best for their comfort for establishing a friendly environment; if out on their land, allows them to show their love & pride of their land and you to admire and learn the reality on the ground
   b. They may enjoy coming to your office – it can be a motivating place in its own right
   c. Public place (restaurant, coffee shop, etc.),
   d. Town Hall meeting room if would be a property of interest to the Town
   e. Offer options, but let it be their call on a location

2. Who
   a. Can be the land agent only – best for establishing a low-key experience for the personal relationship that you wish to have w/ landowner (should it become a project), & if the landowners are unsure of their interest too much can overwhelm.
   b. Including others – from your or other groups (i.e. town Conservation Commission) can improve the scene depending on circumstances such as the landowner's comfort &/or if the property's desirability is linked to the interest of other attendees (e.g. adjacent to town land). A benefit to multiple participants is that questions are more likely to be asked, and items & considerations to be brought up & covered. Some landowners enjoy the attention which highlights the importance of their land

3. What to bring
   a. MAPS – landowners love seeing maps of their property: aerials, tax maps, streams/wetlands, special habitat. Landowners can be very surprised to see some of the resource values as well as how the tax maps can sometimes be so inaccurate, and they are pleased to correct the realities.
   b. Generalized information on conserving land (pamphlets, downloads w/links)
   c. Tax cards (if a sale is involved) – refer to if needed for questions.
   d. Conservation Easement an example, template, or a template summary highlighting the sections directly applicable to treatment of the land and for customizing (negotiating) the easement - Purpose, Use Restrictions, Reserved Rights of Landowner, & those of Grantee. For general discussion reference; leave a copy if wanted.

Caution – The costs of doing a project are mind-blowing to most people (stewardship endowment, Phase I ESA, surveys, BDR, legal work, staff time, etc.). These are to be dealt with as gently as possible, and if the transaction will need outside funding sources be sure to be clear about who would be paying for what. A landowner's 1st thought is that these are costs for them to bear, hard to hear when you are donating an easement or that the costs would come out of a sale.
At the same time it must become clear what the costs are & the realities of project costs. This is easier said than done.

IV. Follow-up

1. If specific information is requested by landowner, communicate with them asap (call preferable, but email if landowner is OK or prefers)
2. Send a letter recapping the meeting & paths discussed or decided upon, describe next steps & expectations, and summarize the process overall. Include materials not provided earlier (ie CE example, conservation pamphlets, etc.).
3. Assure them that you will keep them updated throughout & are available to them at any time – then do so.

Sometimes you may feel like a salesperson trying to make the sale – and you are, but it may help anxiety to see that you are really providing a service. If a landowner will see a benefit to their income and comfort in realizing less stress on their retirement plans, they will be able to sit on the front porch sipping iced tea, and get real pleasure from looking at their land that will never change for the worse. What's not to like?