

THE TRUST *for* PUBLIC LAND  
CONSERVING LAND FOR PEOPLE



**Conservation Finance : Creating New Dollars for Land  
Conservation in California Communities**

# Conserving Land for People

The Trust for Public Land conserves land for people to enjoy as parks, gardens, and other natural places, ensuring livable communities for generations to come.

*TPL Mission Statement*

# TPL's Conservation Services

## Conservation Vision

Helping communities to develop implementation strategies for their open space goals.

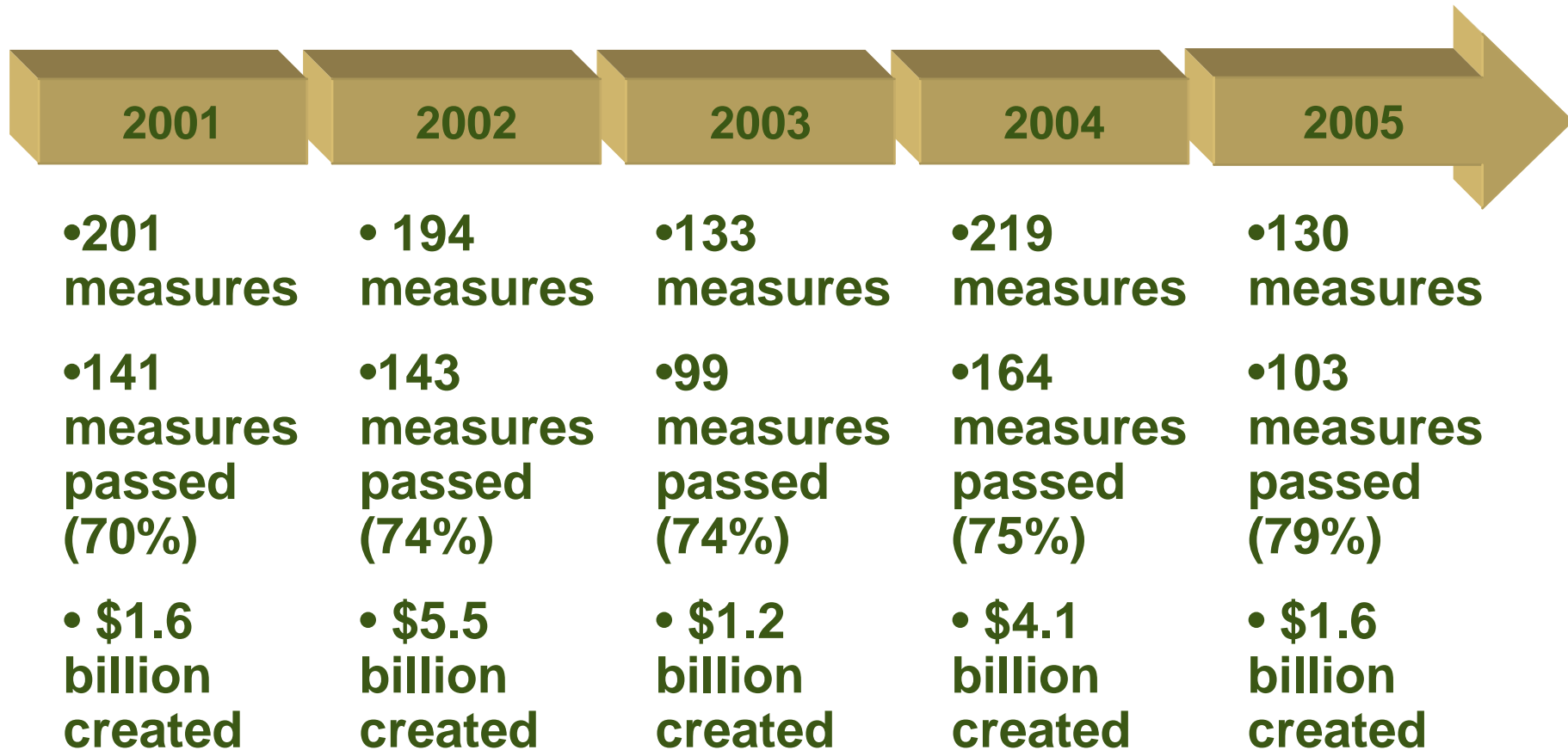
## Conservation Finance

Helping government partners and communities to create funding for land conservation.

## Conservation Transactions

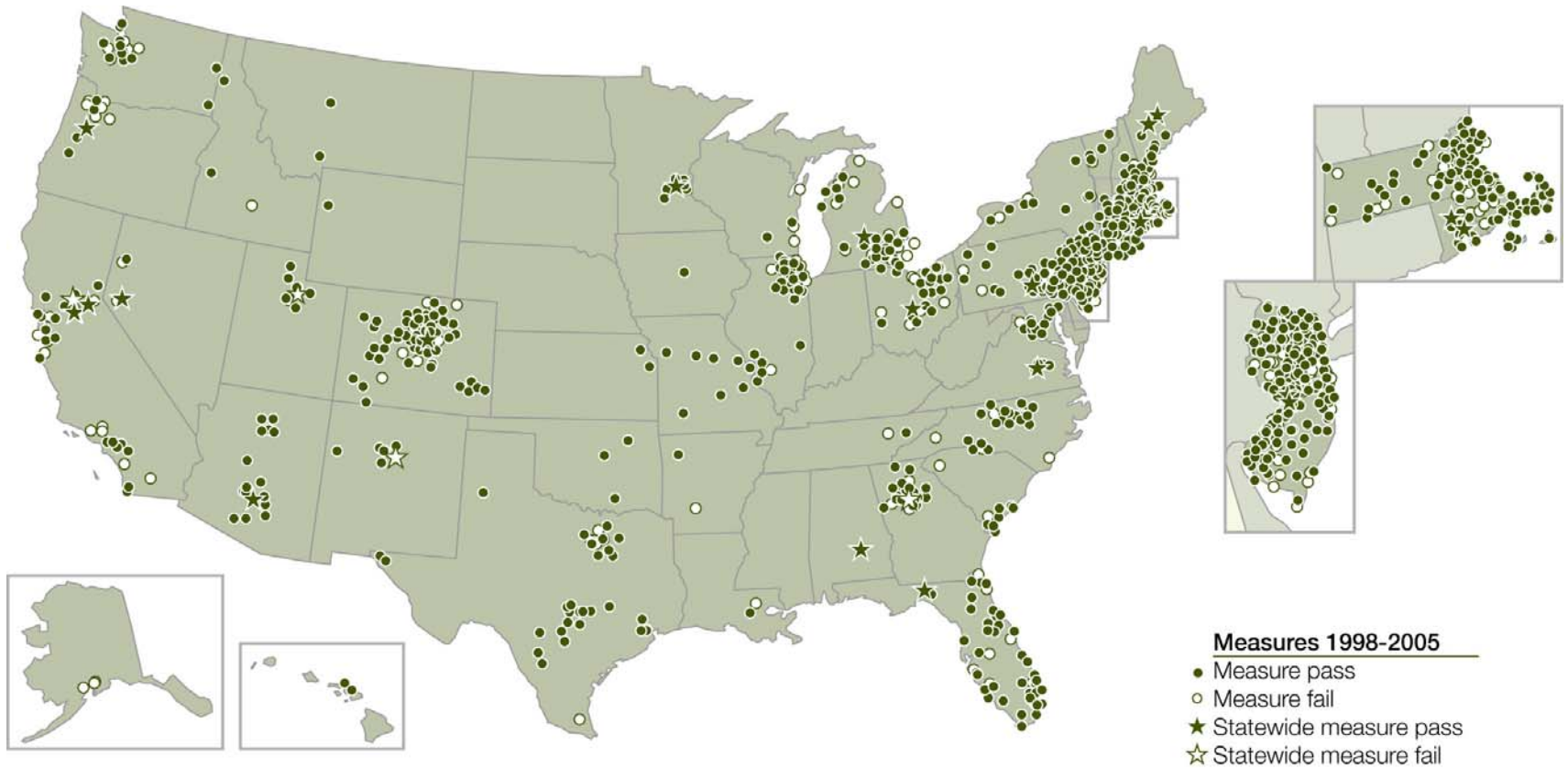
Helping government partners and communities to evaluate and purchase land.

## Ballot Measures 2001 - 2005



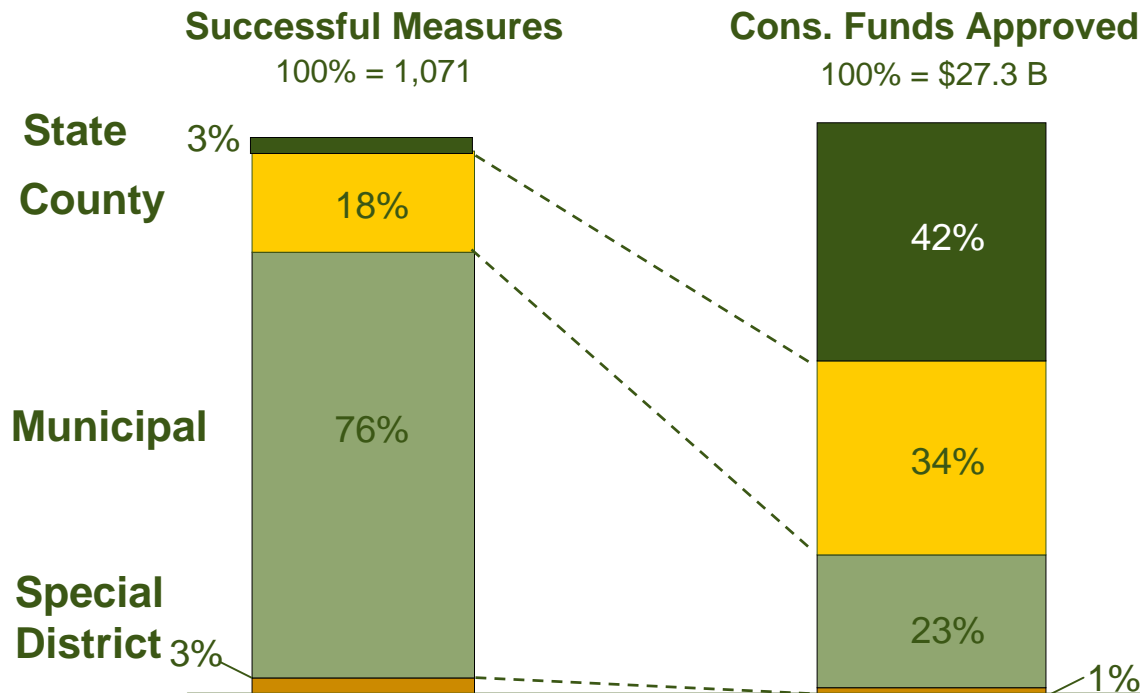


# LandVote Ballot Measures 1998 – 2005



# Who is Creating Funding?

Since 1996, Voters Have Approved 1,071 Open Space Ballot Measures, Authorizing \$27.3 Billion in Conservation Funding\*



Analysis of Land Vote data by Peter Szabo for the Doris Duke Charitable Foundation

\*Note: This does not include legislatively authorized spending programs, such as those in Florida, New York, and Maryland, which were not submitted directly to voters

# Passage Rates are Consistently High

Conservation Ballot Measures Pass Nearly 80% of the Time, With Voter Support a Consistent 60% Across All Jurisdictions

## Success Rates by Jurisdiction

<u>Jurisdiction Type</u>	<u># Fail</u>	<u># Pass</u>	<u>Total</u>	<u>\$ Approved (\$ billion)</u>	<u>% Pass by Juris</u>	<u>Avg. "Yes"</u>
State	6	32	38	11.4	84%	61%
County	56	193	249	9.3	78%	59%
Municipal	232	814	1,046	6.3	78%	60%
Special District	<u>22</u>	<u>32</u>	<u>54</u>	<u>0.3</u>	<u>59%</u>	<u>56%</u>
Total	316	1,071	1,387	27.3	77%	60%

# Conservation Finance Ballot Measures

## *National Trends*

- Bipartisan -- Red State/Blue State popularity
- Not subject to economic fluctuations
- Broad support base: environmental and business community
- Leading States: NJ, CO, FL





## Ballot Measures in California – 2002 - 2005

JURISDICTION	YEAR	% YES	% NO	AMOUNT
Los Angeles	2004	76%	24%	\$100,000,000
Marinwood/Dist	2005	71%	29%	\$1,800,000
Monterey/Dist	2004	55%	45%	\$15,000,000
Oakland	2002	77%	23%	\$50,000,000
Portola Valley	2005	58%	42%	\$608,539
Sacramento Co	2004	75%	25%	\$48,000,000
San Diego Co	2004	67%	33%	\$880,000,000
Santa Monica	2002	77%	23%	\$25,600,000
<b>TOTAL</b>				<b>\$1,120,400,000</b>

## TPL Experience

	Number of Ballot Measures	Open Space Funds Created
Nationwide	342	\$23 billion
California	16	\$8 billion

## Local Conservation Funding Options: California

### Mechanisms:

- Bonds
- Parcel Taxes
- Sales & Use Taxes
- Benefit Assessment Districts

### Enactment Processes:

- Ballot Measure
  - *Referendum*
- Assessment Proceedings
  - *Mail-in ballots*

# Challenges

- Competing priorities
- High approval thresholds
- High cost of property
- Contaminated land

*Experience shows that these challenges can be overcome with the right mix of strategy, resources and community support*



# Why Local Conservation Finance is Essential

- Local funding is the foundation of any long-term land conservation efforts, including those to protect drinking water sources
- External funding – federal, state, private – can be an important, but secondary, means of completing a land conservation project
- Competition for external funding is fierce and may not be reliable due to ever-changing state and federal budget circumstances

## April 2004 National Poll Reveals Strong Support for Land Conservation

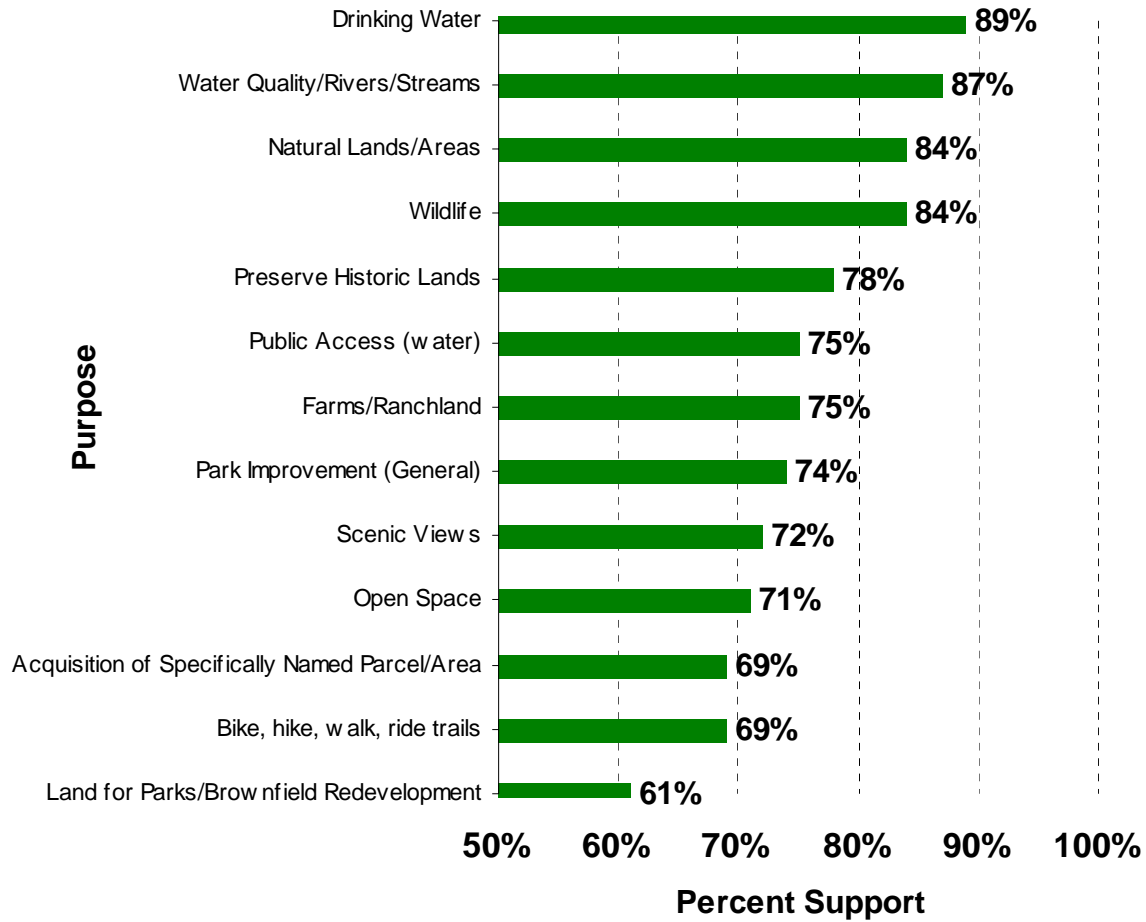
- 65% of U.S. voters would support small increase in taxes to fund state or local government programs to purchase land to “protect water quality, natural areas, lakes, rivers or beaches, neighborhood parks and wildlife habitat”
  - 56% would pay \$50 more per year in taxes
  - 60% would pay \$25 more per year in taxes

Source: Poll of 1,500 registered voters surveyed April 3 to 12, 2004, by Fairbank, Maslin, Maullin & Associates (D) and Public Opinion Strategies (R) for the Trust for Public Land and the Nature Conservancy

## April 2004 National Poll Reveals Strong Support for Land Conservation

- Top national goals for land conservation (ranked “very important”)
  - Quality of life: 70%
  - Protect working farms and ranches: 63%
  - Protect natural areas: 62%
- 84% feel it’s very important to buy land to protect drinking water quality; 75% to improve water quality in our lakes, streams and rivers

## Voter Support for Conservation Purposes

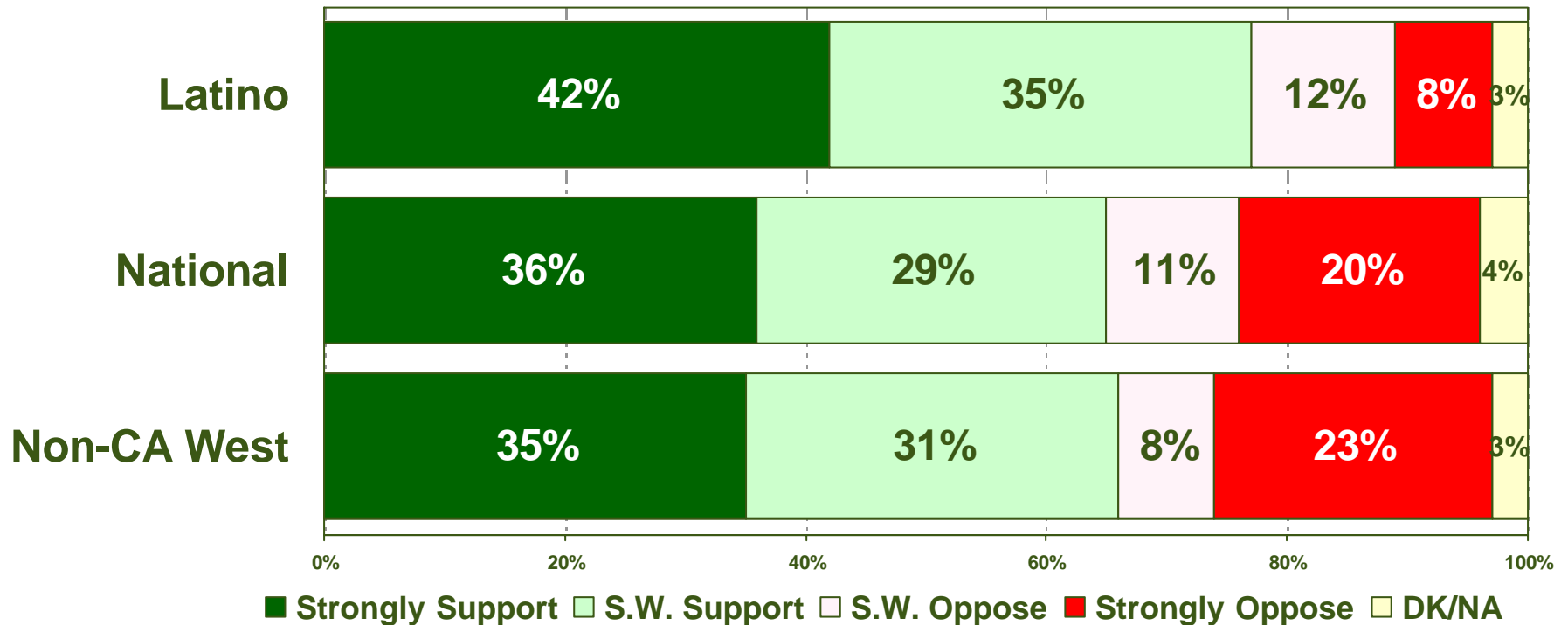


Based on 26 polls conducted by the Trust for Public Land, Dec. 2003 -- Dec. 2004



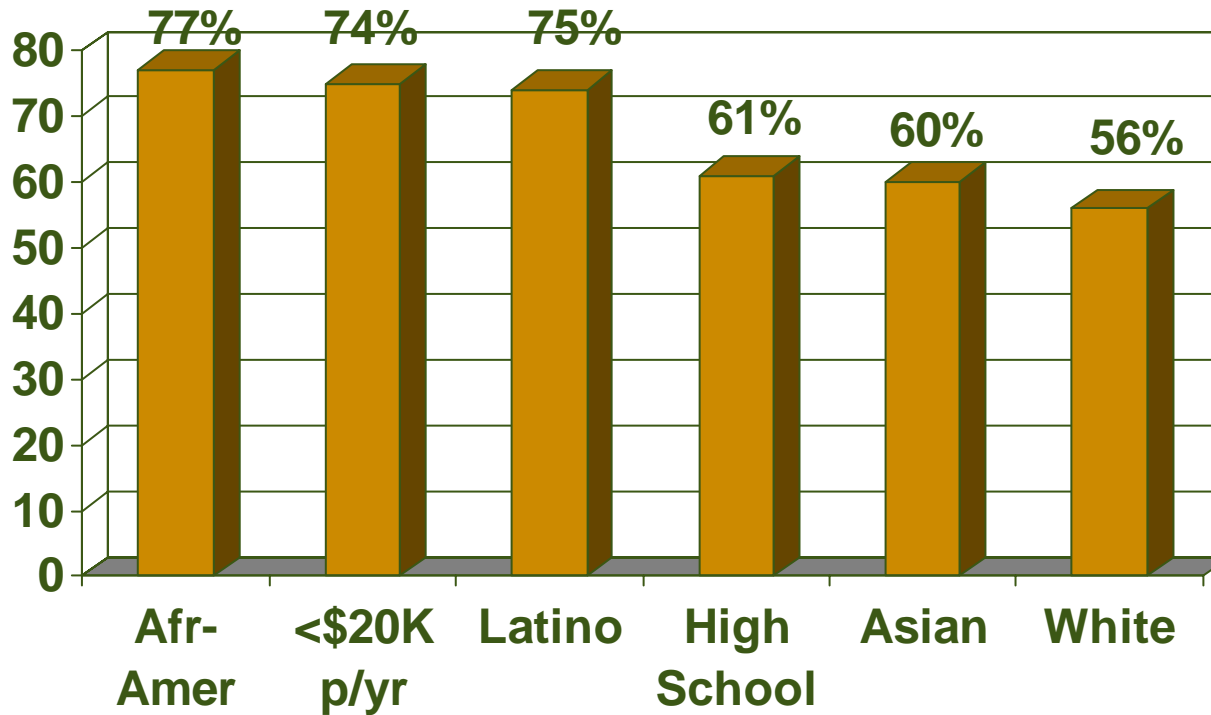
## Strong Support Among Latino Voters for Conservation Funding Measures

*Suppose that these programs through which your state or local government would purchase land to protect water quality; natural areas; lakes, rivers, or beaches; neighborhood parks; and wildlife habitat required a small increase in taxes. In that case, would you support or oppose these programs?*



# Exit Poll: 2002 Statewide Park Bond Measure

Source: Garcia, R. [et al]. *Dreams of Fields: Soccer, Community and Equal Justice*. Center for Law in the Public Interest, 2002.



# Key Variables in Measure Design

- **Funding Source**
- **Amount (and duration)**
- **Purposes/Uses of Funds**
- **Timing (choice of election date)**
- **Management/Accountability**



# Critical Steps for a Successful Ballot Measure



## Step1: Feasibility Research

- Explore fiscal capacity and finance options
- Evaluate legal issues and election history
- Assess open space, park and conservation priorities



## Step 2: Public Opinion Surveys

- Determine potential level of public support for financing parks and open space
- Test voter priorities, sample ballot language, spending tolerance, fiscal safeguards



## Step 3: Program Recommendations

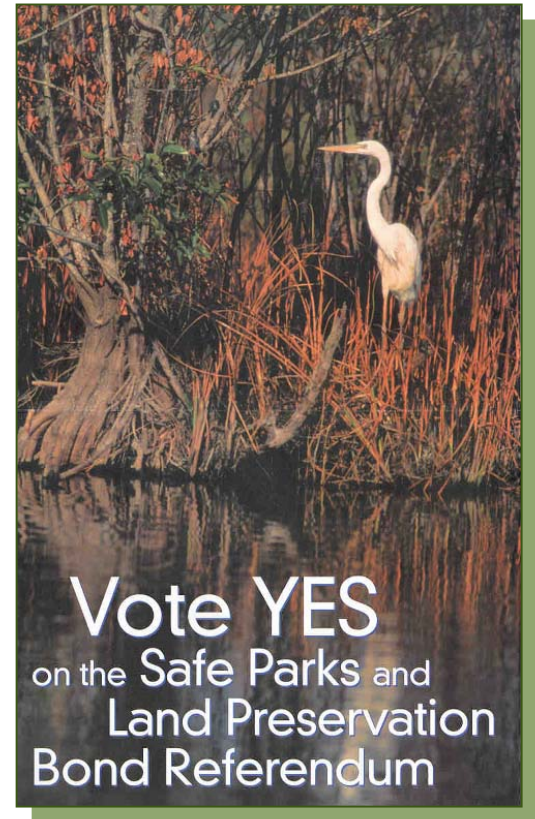
- Covering the choice of funding mechanism, the amount and duration of financing, expenditure priorities and public accountability

## Step 4: Measure Design

- Design measure to meet legal requirements, reflect popular priorities and attract public and political support

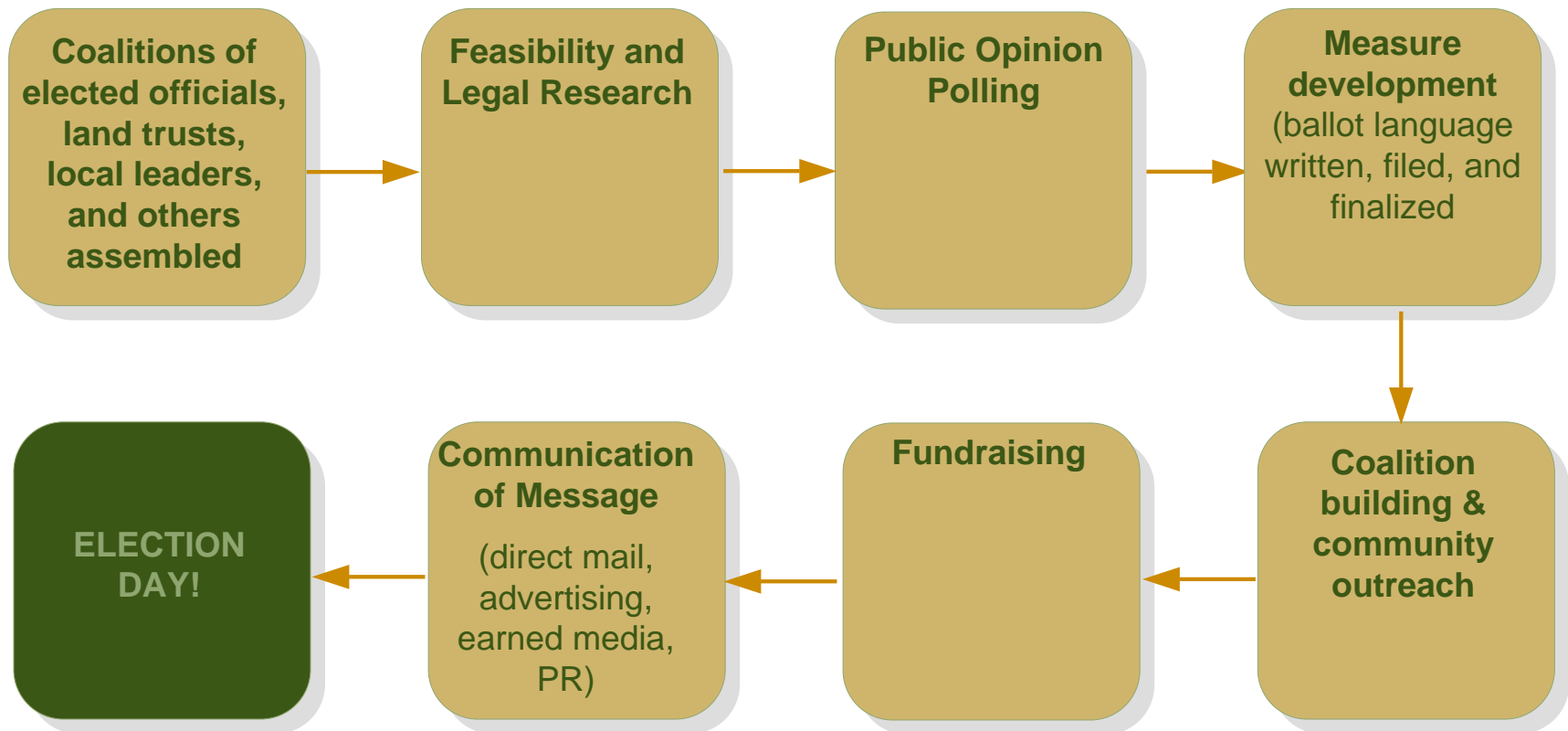
## Step 5: Campaign

- Structure the campaign governance committees and create plan for fundraising
- Design communications and media mix
- Get out the vote





# How Conservation Finance Works





## 1997 Ballot Language – Lost 61% to 39%

*Shall Adams county **taxes** be increased \$5,000,000...by a countywide sales **tax** of one-fifth of one percent...for fifteen years...for the purpose of acquiring, constructing, equipping, operating and maintaining open space and parks and recreational facilities (the “Open Space **Tax**”): and shall all or a portion of the revenues from such **tax** be deposited in a special fund to be known as the “Adams County Open Space Sales **Tax** Capital Improvement Fund” and utilized solely to provide the capital improvements authorized in Adams County Resolution No. 92-2 or for repayment of bonds: and shall all revenues from such **tax** and any earnings on such revenues...constitute a voter-approved revenue change: and shall such **tax** be imposed, collected, administered and enforced as provided in Adams County Resolution No. 93-1 as amended by Adams County Resolution No. 97-2?*

## 1999 Ballot Language – Passed 60% to 40%

*Shall Adams County **taxes** be increased \$5.5 million, and whatever amounts are raised annually thereafter, by a countywide sales **tax** of one-fifth of one percent (20 cents on a \$100 purchase), effective January 1, 2000, and automatically expiring after 7 years, with the proceeds to be used solely to preserve open space in order to limit sprawl, to preserve farmland, to protect wildlife areas, wetlands, rivers and streams, and for creating, improving and maintaining parks and recreation facilities, in accordance with Resolution 99-1, with all expenditures based on recommendations of a citizen advisory commission and subject to an annual independent audit and shall all revenues from any such **tax** and any earnings thereon, constitute a voter approved revenue change.*

# TPL's Conservation Finance Services

## Technical Assistance

- Feasibility Research
- Public Opinion Surveys
- Program Recommendations
- Ballot Measure Design
- Legislative Support

## Campaign Assistance

- Public opinion surveys and focus groups
- Strategic campaign planning
- Campaign management and fundraising
- Selection of media professionals
- Message development, communications
- Compliance with campaign finance laws

## Conservation Finance: 80% of Measures Passed!

Year	# of TPL Measures	Wins	Conservation Funds Approved
1996	27	26	\$0.6 billion
1997	13	11	\$0.2 billion
1998	48	30	\$4.6 billion
1999	18	16	\$4.0 billion
2000	76	60	\$3.7 billion
2001	43	33	\$0.8 billion
2002	48	38	\$5.3 billion
2003	20	19	\$0.8 billion
2004	49	42	\$2.4 billion
<b>Total</b>	<b>342</b>	<b>275</b>	<b>\$22.4 billion</b>



**Thank you!**