



Membership Policy

Adopted 10-3-05; Revision 6-30-15 and 2-27-2024

INTRODUCTION

The California Council of Land Trusts has adopted our membership policy to:

- Identify the categories of participation and support for CCLT, the criteria and process for each category, and the benefits and financial requirements for each.
- Ensure continued clarity of purpose and focus for CCLT.
- Identify land trusts engaged in sustainable land conservation in accordance with legal requirements and widely accepted principles of good business and charitable practices.
- Ensure that CCLT's membership consists of organizations that act in ways that support and advance the identity and reputation of California's land trust community and land conservation generally.

No category of membership or participation has voting rights to govern the affairs of the organization. All decisions regarding participation are made by CCLT in its sole and complete discretion.

LAND TRUST DEFINITION

Organizations identifying themselves as land trusts are engaged in a wide variety of conservation-related activities including but not limited to acquisition, stewardship, recreation, education, land use planning and public policy advocacy.

To be a land trust for CCLT purposes, an organization must meet two general criteria:

1. An organization must be both:
 - a. a nonprofit 501(c)3 corporation
 - b. a public charity described in IRS Code Section 170(b)(1)(A)(vi) or Section 509(a)(2) which require that the organization meet the public support test¹
2. An organization's principle purpose and activity is the conservation of natural or cultural resources, working landscapes, and/or the provision of outdoor experiences which are achieved in whole or part through the direct protection and/or stewardship of land. Direct protection is defined as the acquisition of conservation easements and fee interests in real property. Stewardship encompasses the range of activities involved in controlling, managing and restoring a property or conservation easement and its attendant resources for

CALIFORNIA COUNCIL OF LAND TRUSTS

conservation purposes. Outdoor experiences can include, but is not limited to, education, recreation and inspiration.

CATEGORIES OF PARTICIPATION

1. **Land Trust Member.** Organizations that meet the land trust definition above are eligible to apply for *Land Trust Membership* in CCLT.

Process. New applicants must submit a completed application form with supporting information. CCLT will review these materials and undertake any additional inquiries it deems appropriate. The Board of Directors will vote upon each admission and its decision is final.

Criteria. To evaluate new applicants, CCLT will rely upon (1) CCLT's adopted *Qualifications for Membership*² and (2) CCLT's *Community Integrity Principles for California Land Trusts*. Applicants must demonstrate that they meet the *Qualifications* and generally practice according to the *Integrity Principles*. Neither being a member of Land Trust Alliance nor adoption of *Standards and Practices* is sufficient alone to qualify as a member of CCLT.

Renewal. After being admitted as a member of CCLT, renewal is expected to be routine. It requires an annual affirmation by the Executive Director or Board Chair that the land trust operations remain consistent with qualifications and community integrity principles. However, CCLT reserves the right to require additional information and re-evaluate the member.

ANNUAL DUES

Annual membership runs on the calendar year, with renewal notices sent in October. Dues are on a sliding scale to reflect the diversity of land trust size and financial capability. It is CCLT's policy to evaluate our need to make adjustments or restructure dues levels every three years to reflect a cost of living adjustment rather than make minor changes each year. The scheduled dues increases will occur for the years 2016, 2019, 2022, and every three years thereafter. The dues are based on annual operating budget* in the following categories:

Level 1	Under 50,000	Level 5	250,001 - 500,000
Level 2	50,001 - 75,000	Level 6	500,001 - 1,000,000
Level 3	75,001 - 100,000	Level 7	1,000,001 - 3,000,000
Level 4	100,001 - 250,000	Level 8	over 3,000,001

* To ensure fairness for all members, your operating budget should be calculated as follows: Referring to Part IX, Statement of Functional Expenses, on your most recently-filed IRS 990 form,

CALIFORNIA COUNCIL OF LAND TRUSTS

subtract capital expenses (specifically, land or easement purchase and the construction of building other fixed improvements) from “total functional expenses” on line 25, column A. This is your “operating budget “upon which your membership dues are calculated. If you had no capital expenditures in the year, then your operating budget is equal to your functional expenses.

Membership Renewal Process Timeline*

Nov.	Membership renewal letters mailed out.
March 1	Membership renewal due date. Land trusts that have pledged to make installment payments must make their first pledge. Reminder letters will be sent in March.
June 1	Deadline to pay membership dues and retain membership benefits. Membership suspension warnings will be sent in June.
Aug. 1	Notice that membership has been suspended until dues are paid.

*We reserve the right to make alternative arrangements in extraordinary circumstances with members in good standing.

- Provisional Land Trust Member.** An organization is eligible to apply as a *Provisional Land Trust Member* if it falls into one of two conditions. First, an organization that otherwise meets the land trust definition but is in its Advance Ruling Period (generally, the first five years of a nonprofit corporation’s existence). Second, an organization that has passed its Advance Ruling Period, but whose level of direct protection or management activities are growing but not yet more than 50% of its total activities.

Process. Applicants must submit a completed application form with supporting information. CCLT will review these materials and undertake any additional inquiries it deems appropriate.

The Board of Directors will vote upon each admission and its decision is final. Upon meeting the public support test (generally, the conclusion of the Advance Ruling Period), *Provisional Members* can apply to become full Members.

Criteria. *Provisional Members* will be evaluated according to the same criteria as *Members* (see above. To be admitted, a *Provisional Member* must meet Qualification numbers 2, 6, 8 and 11 but are only expected to meet other Qualifications to the extent appropriate for their formative development.

Term. An organization may remain in the provisional category for a maximum of five years. If extenuating circumstances exist, CCLT may consider extending Provisional Membership beyond the five-year period.

CALIFORNIA COUNCIL OF LAND TRUSTS

Renewal. After being admitted as a *Provisional Member* of CCLT, renewal is expected to be routine during the Advance Ruling Period. After this period, the *Provisional Member* must apply to become a full Member or transition to another category of participation. However, CCLT reserves the right to require information and re-evaluate the member at any time during the five-year period.

Annual Dues. The timing and amount of dues are the same as that of *Members* (see above).

3. **Professional Member**. Any public agency, nonprofit organization, corporation, professional or individual that wants to support CCLT's purpose is welcome and eligible to apply to become a CCLT Professional Member. CCLT has three Professional Membership Categories: Individual, Professional/Basic, and Professional/Prime. All Professional Members will receive an annual notice to continue their membership.

In becoming a Professional Member, an entity is not endorsing any CCLT position, activity or program, nor does it hold any voting rights. Each category has a simple, one-page application form. See separate materials for further information about becoming a Professional Member.

PROCESS

Applications for *Members* and *Provisional Members* will be reviewed by CCLT's Membership Committee, which may, as needed, undertake further inquiry about an applicant. The Committee will make recommendations to the Board of Directors regarding admission for each applicant.

Complaints or inquiries about CCLT members are not anticipated to be frequent or voluminous. The Committee will handle any credible complaints according to CCLT's *Complaint Procedures*.

CCLT reserves the right to makes all decisions regarding membership and termination in the organization in its sole and complete discretion.

¹ Under exceptional circumstances, the CCLT Board of Directors reserves the right to accept organizations that were formed and operate in all ways consistent with land trust purposes, standards, practices and operating principles but that may have a different legal structure.

² The CCLT Board of Directors also reserves the right to allow exceptions to the adherence to *Qualifications for Membership* under exceptional circumstances and if the organization is in substantial compliance with the *Qualifications*.

CALIFORNIA COUNCIL OF LAND TRUSTS

CALIFORNIA COUNCIL OF LAND TRUSTS