Leaders in the Fields:
Seven Successful Municipal Open Space Referendums in the Lehigh Valley
HERITAGE CONSERVANCY is a full-service, not-for-profit conservation organization with over 50 years of professional experience. Our mission of “Preserving Our Natural and Historic Heritage” is achieved by working with national, regional and local partners to plan and implement sustainable initiatives for land conservation, historic preservation, natural resource protection and land stewardship. Our recent accreditation by the Land Trust Accreditation Commission affirms our commitment to excellence, trust and permanence. Learn more by visiting www.HeritageConservancy.org.
SMART MUNICIPAL OFFICIALS PLAN FOR BOTH REASONABLE GROWTH AND THE PRESERVATION OF IMPORTANT RESOURCES. If the zoning is in place, if needed services are available and if the market’s right, growth will happen. The private market takes care of the financial requirements. Conservation goals are not as easy. Resources of the land may exist, but the financials often do not. Land use regulations play a role, but conservation also requires public investments in green infrastructure comparable to investments in roads, schools and other public facilities.

Successful conservation in the Lehigh Valley will entail the active participation of various levels of government, nonprofit organizations and private interests. Quality of life and economic sustainability in the Lehigh Valley will be enhanced through the implementation of county and municipal conservation goals.

The role of municipalities is an increasingly important part of the funding equation. To qualify for state and county grants for municipal projects, match money is required. There are also those situations where county or state funds may not be available for a very important local preservation project and the community will have to rely on its own resources. There are situations where a municipal preservation need may not meet county or state criteria or timing. Local money will be needed to meet local needs.

Securing funds for open space, recreational areas and natural resource protection is important not only in rural and suburban communities, but also in the region’s boroughs and cities. Quality of life and economic stability in these more developed communities would be enhanced by the acquisition and development of land for parks and recreation areas, trails and pedestrian ways, and the greening of streets and public places.

Both counties have appropriated funds tagged to open space and natural resource protection. Lehigh County raised $30 million in 2002. Northampton County raised $10 million in 2000 and $37 million in 2002. These were all approved by the voters in county sponsored referendums.

At the municipal level, seven townships in Northampton County have had earned income tax (EIT) measures approved by their voters for these purposes. No municipal measures have been approved to date in Lehigh County. An EIT is applied only to earned income, not investment income or social security payments. Although these seven municipalities have applied a 0.25% tax, in other areas of Pennsylvania, municipalities have used other percentages, both lower and greater. Other municipalities have enacted real estate taxes and realty transfer taxes for conservation. In others, voters have approved bonds for specific amounts of money. In several municipalities, both EITs and bonds have been approved to distribute tax payments among wage earners and real estate.

- **WILLIAMS TOWNSHIP** approved a 0.25% EIT in the general election of 2004
- **BUSHKILL TOWNSHIP** approved a 0.25% EIT in the general election of 2005
- **LOWER MOUNT BETHEL TOWNSHIP** approved a 0.25% EIT in the primary election of 2006
- **MOORE TOWNSHIP** approved a 0.25% EIT in the primary election of 2005
- **LOWER SAUCON TOWNSHIP** approved a 0.25% EIT in the general election of 2006
- **UPPER MOUNT BETHEL TOWNSHIP** approved a 0.25% EIT in the primary election of 2007
- **PLAINFIELD TOWNSHIP** approved a 0.25% EIT in the general election of 2007
What this Report can do for Your Community

THIS REPORT WAS PREPARED FOR EVERYONE IN THE LEHIGH VALLEY WHO IS INTERESTED IN PROTECTING SENSITIVE LAND RESOURCES. We hope municipal officials—both elected and those appointed to the municipal commissions and boards—will read the stories of successful referenda and discuss how their communities can more effectively preserve important lands. We believe that citizens who serve on local Planning Commissions and Environmental Advisory Councils (EACs) will find information in this report very useful. The report should also be reviewed by members of local land conservancies, watershed associations, outdoor clubs, recreation associations, economic development groups and other community organizations who believe that the quality of the environment directly affects quality of life and economic wellbeing in the Lehigh Valley. And we hope the report reaches the many voters and taxpayers who will cast the important votes to support funding for conservation.

The purpose of the report is to tell the tales of the seven successful local efforts to raise money for the protection of farmland, natural resource areas and open space. It describes what worked, how it worked and lessons learned. Most importantly, it describes the ways that those who advocated the referendums reached out to their fellow citizens to explain what was being proposed, what types of land were intended to be protected, what criteria would be used to evaluate landowners’ proposals to protect their lands and what it would cost the average taxpayer. What we found was that different approaches were taken in various townships to undertake this very important outreach to the public. No one approach fits the needs and conditions in all municipalities.

Heritage Conservancy and Wildlands Conservancy worked together to prepare seven case studies that describe the experiences in the townships listed on page one. Both organizations have long histories in the Lehigh Valley conservation efforts. Municipal officials who were active in these efforts were interviewed for these reports. These are the stories and experiences of your fellow municipal officials and supporting volunteers, not those of the conservancy staffs. Heritage Conservancy and Wildlands Conservancy have worked with several of these municipalities in their efforts to explain to constituents matters related to funding for open space protection. Both conservancies have assisted municipalities to implement their open space plans by working with open space committees and landowners to spend the funds wisely and protect important properties.

We trust that officials in the other Lehigh Valley municipalities will find these stories useful and be willing to ask their voters to approve open space referendums. And we hope that your municipal goals for conservation and sustainable community development will be more readily achieved through a reasonable balance between preservation and growth.

Please take the time to read the following reports on the efforts, experiences and successes of these Lehigh Valley residents and municipal officials. The reports are listed in the sequence that the referendums were approved by the voters in these communities.
EFFECTIVE CONSERVATION STARTS WITH GOOD INFORMATION and there is a lot of good information readily available to provide support for local conservation.

Two plans prepared and published by the Lehigh Valley Planning Commission are particularly useful. Both the Comprehensive Plan for Lehigh & Northampton Counties, the Lehigh Valley 2030 (2004) and the Lehigh Valley Greenways Plan: A Regional Greenways Plan for Lehigh and Northampton Counties (2007) provide a wealth of data and mapped information related to natural resources, agricultural lands, parks, recreation and open space. The plans also describe reasons to protect the resources and provide parks and recreation facilities. These explanations can be very useful in making the case for conservation efforts at the municipal level. The plans include descriptions of various implementation techniques that can be used to achieve local goals.

In addition to county planning documents, many municipalities have prepared plans for the protection of natural resources, farmland and open space as well as for the provision of parks, open space and recreation facilities. These plans were reported to have been very useful in public meetings prior to the open space referendums.

Many of the people interviewed for this report said that there was a substantial amount of consultation among the people in the municipalities where referendums were passed. They discussed what worked, what didn’t, how to best provide important information to the public and what were the requirements of various laws related to open space funding, particularly Act 153 of 1996, Act 138 of 1998 and Act 4 of 2006 of 2006. It’s always best to learn from other’s successes and mistakes.

Continued cooperation and partnerships involving state and regional agencies, the county governments and the municipalities will help make larger scale conservation and recreation projects within the Lehigh Valley and beyond possible. And these efforts will make substantial contributions to the quality of life and economic sustainability for Lehigh Valley residents. These projects include critical areas such as the Delaware and Lehigh National Heritage Corridor, the Lehigh Valley Greenways, the Pennsylvania Highlands and the Kittatinny Ridge, known locally as the Blue Mountain.

Cooperation and partnerships will be critical for funding local conservation efforts. Funds provided through the Pennsylvania Department of Conservation and Natural Resources and other agencies, the Delaware and Lehigh National Heritage Corridor, Inc., Lehigh and Northampton counties, and a variety of land trusts and foundations—ranging from local family foundations to large national organizations—can work together to leverage funding and stretch dollars raised by municipalities. In conservation efforts, partnerships make good things happen.
Williams Township
It is a Political Campaign

PASSED: A 0.25% EIT in the general election of 2004
ANNUAL REVENUES: $260,000 last reported

Being the first in just about anything is never easy. Williams was the first municipality in the Lehigh Valley to ask for voter approval of money for conservation. Both counties had passed referendums, but raising taxes at the local level is an entirely different ball game.

Probably the most difficult hurdle was just getting the elected officials to agree to put an open space question on the ballot. It doesn’t matter that open space referendums have been passed in places outside the immediate area. Local issues are never the same and being the first to stick your neck out is really risky business. Supervisor Bob Doerr put forward the idea of using township tax money to protect important farmlands and natural areas in the community. Initially, one other supervisor was not committed to the idea; the third was against. After much discussion, it was agreed to put the question on the ballot and let the township voters make the decision.

An open space plan, adopted by the Board of Supervisors in July of 2002, offered a rationale for raising money for land conservation and described municipalities where voters had approved tax measures for these purposes, but none of these communities was close by. It took a substantial amount of convincing to get the other supervisors to agree to put the question on the ballot and let the voting taxpayers decide the issue. The question was put on the ballot in November of 2004 and passed with a 73 percent approval of the voters.

THE LANDSCAPE The township has a mixed topography with three primary features. The Delaware River, a significant natural resource, runs along the eastern boundary. In the southern portion of the community, Stouts Valley is a beautiful and productive agricultural area. Much of the remainder of the township is a combination of hills and meadows with the hills in dramatic topography of slopes in the 15 to 25% and the 25% and steeper categories.

The 2002 open space plan stressed the need to protect these unique and sensitive natural areas. Although land use regulations can require open space within residential developments and natural resource protection standards can limit intrusion into certain natural features, money was needed to effectively implement the plan. The referendum was intended to provide the funds to protect the township’s natural and farming resources. Money for active recreation land would be secured from other sources.

MOST IMPORTANT: COMMUNITY EDUCATION Convincing the other supervisors to put the questions on the ballot may have been the most difficult task. Educating the community was the most important. An ad hoc committee of 5 to 6 people, not appointed by the board of supervisors, took on the responsibility to educate themselves in order to educate the public. Three referendums in Solebury...
Township, Bucks County, had been passed prior to 2004. Bill Tinsman, a Solebury supervisor who had been instrumental in the success of that township’s referendums, provided very useful guidance. Heritage Conservancy’s staff and publications were also used for reference. The ad hoc committee met weekly to work on the campaign.

In order to explain critical issues, the committee sent letters to the editor of the local paper. The proposed referendum was the cover story in the township’s newsletter, which was written by Bob Doerr. Three mailers were written and sent to homeowners. The committee felt these mailers needed to include top quality graphics and they hired an artist, at their personal expense, to provide the illustrations and photographs. Yard signs were also produced. The committee members paid for most of the costs of producing the information material. Some money was raised from various sources to help with mailing costs. Public dollars were not used in the campaign.

A series of well-attended public meetings were held to address related issues. The township’s taxes were one of the lowest in the county, but the school district taxes were one of the highest. It was felt that an economic argument needed to be made to describe the relationship between residential development and school taxes. “The people we needed to get to were those that understood the economics…those that wanted to live in a rural setting were going to vote for it,” said Doerr.

At one public meeting, the ideas in Heritage Conservancy’s publication, Opportunity Knocks – Open Space is a Community Investment explained how, in a fairly short number of years, the purchase of land or easements for conservation avoids the ongoing and ever increasing school costs associated with residential development. It was also explained that the earned income tax would not place a burden on the community’s older residents. Younger working people, who would likely live in the community longer and enjoy the open space, would pay the greater share of the tax.

Committee people manned the polls to provide last minute information and support which lead to the passage of the measure.

UPDATE In 2004, it was anticipated that the tax would produce about $135,000 per year. By 2008, the tax yields $260,000 annually.

The 2002 open space plan included specific criteria for the evaluation of properties which may be considered for protection. These decisions are not made on an arbitrary basis. A 5-member Land Preservation Board, which works with landowners to implement the township’s open space plan and fulfill the property owners’ interests, evaluates landowners’ applications. The Land Preservation Board came to realize that there is a time lag between the passage of the referendum and when the tax money comes in, then another lag involved in working with landowners and then a bit of time till agreements are reached and land is preserved. Patience is an important virtue for those involved in land preservation.

Under the authority of Act 153 of 1996, the township and school board agreed to exempt preserved properties from further tax millage increases. Freezing the millage rate provides a substantial incentive for property owners to consider preservation of their lands. (Act 4 of 1996 now requires the county, the school district and the municipality to all agree on these millage increase freezes.)

To date, about 400 acres have been preserved and 300 acres are pending agreements between the township and landowners. It is likely that 1,200 acres will be protected between the use of money for conservation and zoning provisions which require 50% of development sites be set aside for open space.

The township will work with the county and the state on joint purchases of land or conservation easements. Since the value of conservation easements exceed the county’s limits, township money is essential to protect the very important lands in the community.

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Contributor: Supervisor Bob Doerr was interviewed for this report and spearheaded the campaign that led to the successful referendum.
Bushkill Township
Three Reasons That Won

PASSED: A 0.25% EIT IN THE GENERAL ELECTION OF 2005
ANNUAL REVENUES: $450,000 LAST REPORTED

In order to make a compelling case to the public that an open space referendum should be passed, three primary issues were put forward. Goals are important and should be clearly stated for the public. These were:

- To protect and enhance the quality of life in the township,
- To enhance and help protect property values, and
- To save tax dollars.

The public outreach effort was headed up by the township’s Environmental Advisory Council (EAC), a committee made up of community residents. The Board of Supervisors was not involved in the educational effort. If passed, the money would be used to protect agricultural lands and natural resource areas. The money would not be spent on acquiring active recreation land.

There was also a focus on the protection of woodlands, particularly forested riparian areas along streams. The important privately owned woodlands in the community had been delineated as areas comprising 5.6 square miles on the township’s Official Map. The township’s ordinances require the protection of wooded areas on development sites, but permit encroachment into forested areas for a house and septic system where such impacts are unavoidable and an economic impact on the owner would otherwise result. Remaining mapped woodlands on developing lands are placed under a conservation easement for protection.

As such, the township will use tax revenues, along with its regulatory authority, to protect important lands in the community.

MESSAGES FOR THE PUBLIC The EAC members prepared articles for the township’s newsletter that explained the referendum process and the proposed land protection program. The article stressed the importance of natural resource protection for quality of life purposes. It also explained the fiscal implications related to enhancement of property values and better management of taxes. This included reference to the case made in Heritage Conservancy’s Opportunity Knocks: Open Space is a Community Investment, which explains that investments in open space protection lessen the demands on a school district’s costs and, consequently, on school taxes.

A full page article was written by an EAC member and published in the local newspaper. The paper picked up on the referendum, which provided a key way to get the message out to the broad community.

The EAC also held a public meeting and brought in a Heritage Conservancy representative to present matters related to the tax savings benefits from Opportunity Knocks. New development brings in additional tax revenues, but often the costs exceed the revenues. It was also explained that funds raised for open space
protection would be held in a separate account and could not be placed in the township’s general fund. The money could be used only for land conservation purposes. It was also explained that land can be protected either through the use of very restrictive zoning regulations or by offering landowners fair compensation for conservation easements. The township preferred to use moderate zoning standards and the purchase of easements.

Palm cards were printed to remind voters at poll locations on Election Day to support the referendum. The referendum was passed with a 67% approval vote and was anticipated to produce about $450,000 per year for land protection in the community.

TOO MUCH, TOO SOON? As noted above, a key township goal was to protect existing riparian woodlands, as well as to restore riparian woodlands lost to past development. The Township enacted an Official Map that delineated these areas as greenways, which were intended to be preserved as natural open space. Inclusion of these areas on the Official Map results in a process whereby proposed developments located within the newly mapped areas would be subject to a one-year evaluation in order to allow the township and the landowner or developer to find amenable means to preserve the woodland areas. Means for preservation may include voluntary conservation easements on some or all mapped areas, as well as purchase of the areas by the township or other effective methods. Protection of these wooded riparian areas is consistent with the Lehigh Valley Planning Commission’s natural resource protection planning.

Enactment of the Official Map was followed closely by the proposal for the earned income tax proposal to fund open space and natural resource protection. The majority of residents were in favor of open space preservation, as well as for the tax to accomplish this goal. A minority of residents who were opposed to the enactment of the new Official Map appeared to be confused on how the Official Map process worked and how it was related to the proposed open space referendum. While the Official Map and the development and funding of an open space program were somewhat linked, the two initiatives were not directly related, and rather could certainly be considered as mutually exclusive. Speakers at public meetings on both initiatives explained that the two measures did not result in regulatory overload, but rather established two effective tools that would work together to protect the targeted and very sensitive areas throughout the township. As noted, the referendum passed by approximately 67 percent.

Bushkill Township was certainly aggressive in its approach to preservation. However, based on the record high rate of land development within the community, timely implementation of these protection measures was imperative. The township officials heard the concerns of the residents and, through effective public education, were successful in gaining the necessary understanding and support for the new legislation.

NEXT STEPS Although the township did not hire any professional consultants to help in the referendum process, Heritage Conservancy was hired to assist the EAC in the preparation of an open space plan to guide the use of funds in the most efficient and logical ways. Specific scoring criteria were developed to evaluate the relative importance of properties submitted for the purchase of conservation easements.

They also realized that there is a substantial delay between the voters’ approval of the tax and the flow of money into the township for use. After the tax is approved, the supervisors have to enact an ordinance to authorize the tax. Then there is a delay in the actual collection of the money based on the taxpayers’ filing and the collection through the tax collector. There can be further delays in the negotiation time between the municipality and landowners.

The township is working with both Heritage Conservancy and Wildlands Conservancy to help property owners understand the benefits, the constraints and the process of selling conservation easements under the township’s preservation program.

The township money is stretched with the county’s funding programs for natural resource and farmland protection. However, the township is addressing state and county requirements related to public access to privately held lands which have received public funding for conservation.

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Contributors: Supervisors Brian Kocher and Jason Smith were interviewed for this report. Both were involved in the campaign for the referendum, as well as the development of the Township’s Open Space Plan. Bill Sweeney, EAC member, was also active in the campaign and provided additional information.
Lower Mount Bethel Township
A Grassroots Victory

PASSED: A 0.25% EIT IN THE PRIMARY ELECTION OF 2006
ANNUAL REVENUES: $150,000 LAST REPORTED

A small, ad hoc group of committed individuals organized and ran a campaign that resulted in a 76 percent approval for farmland and open space funding. These were working people with family obligations who spent their time providing information to the public on the benefits of land conservation. Paid consultants were not hired to do the heavy work.

These people received valuable information from Bob Doerr of Williams Township, who led a successful open space campaign in 2004. The committee members prepared an information brochure that explained the benefits of protecting open space. These benefits included the economic or fiscal advantages related to the cost of community and school district services and tax savings. One member of the group ran the numbers to show that more houses meant increased need for community services which, in turn, would result in increased taxes. Land conservation decreases the rising demand for costly services.

According to ad hoc group member Michele Szoka, the group met with seniors at several group lunches. “We connected with seniors and explained this doesn’t affect them financially,” Szoka stated. It was explained that an earned income tax would not impact any nonworking taxpayer and the land conservation efforts would provide benefits for them. On Election Day, seniors, also considered as “super voters” by the ad hoc committee, came out and voted to support for the referendum.

Two well attended public meetings were held to discuss this referendum proposal. At a meeting on May 25, 2005, these volunteers explained the quality of life issues and the importance of protecting farmland and natural areas in the community. A Heritage Conservancy representative described how tax money spent on conservation would save a greater amount in school district taxes. A second public meeting was held on April 26, 2006. Speakers at this meeting included State representatives Robert L. Freeman and Richard T. Grucela who encouraged the township voters and taxpayers to protect those important, productive and sensitive lands in the community. A Heritage Conservancy staff person again described the tax benefits. It was also explained that the zoning ordinance was antiquated and did not do the job of protecting these resources. Even if the ordinance would be updated, zoning does not provide a complete way to preserve critical areas.

The open space funding program would focus on the protection of farmland and natural resource areas. Money for recreation purposes would be sought from other sources.

Right before Election Day, there was a major effort to stuff newspaper boxes with information that would help voters understand the issues and support the measure.
ZONING CONTROVERSY  While the community was in the process of discussing the open space referendum, the township had been considering an amendment to the zoning ordinance for quite some time. The zoning amendment was controversial and people opposed to the zoning issue attended the public meetings to speak out against the zoning and the referendum. Those who supported the referendum were concerned that the public might not understand that the two proposals were not linked and that support for the referendum would not build. Based on the positive and overwhelming support for the referendum, the voters understood that the referendum was separate and important, but angry interchanges at the public meetings raised anxiety and concern for the referendum.

ONGOING LAND PROTECTION  From other sources of funding, close to 3,000 acres of land have been protected. The earned income tax revenues will produce about $150,000 per year and be critical to the on-going land conservation efforts before all the important, good lands are gone and the costs of conservation increase substantially.

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Contributor: Michele Szoka, an active member of the ad hoc group that conducted the public information and outreach effort, was interviewed for this report. John Mauser provided additional information and comments.

Moore Township
A Quiet Success

PASSED: A 0.25% EIT IN THE PRIMARY ELECTION OF 2005  ANNUAL REVENUES: INFORMATION NOT PROVIDED

The Moore Township story is a short one. At a meeting of the board of supervisors, a motion was passed to put a question on the ballot for an earned income tax devoted to farmland and open space protection. Nothing much more was done to explain or promote the measure. It passed.

The township has lots of good agricultural soils and the current board of supervisors plans to put all the money raised into farmland preservation. In addition, a Farmland Preservation Board is in the process of being formed.

Wildlands Conservancy is actively helping interested landowners make their case to the township for the sale of conservation easements on their properties.

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Contributors: Supervisor Maynard Campbell and Zoning Officer Jason Harhart provided information for this report.
Lower Saucon Township
A Well-Established Base

PASSED: A 0.25% EIT in the General Election of 2006
ANNUAL REVENUES: $560,000 LAST REPORTED

In the late 1990s, a citizens group came together and got involved in issues related to growth, sprawl and conservation. When the idea came up to ask voters to approve an open space referendum, that group was an established coalition of volunteers and the base needed to conduct a successful campaign. A subgroup formed the Residents for Open Space, a registered political action committee (PAC). The Pennsylvania Campaign Expense Reporting Law requires that any group or individual that accepts more than $250 worth of contributions or spends more than $250 to influence the outcome of a referendum must register as a political action committee with the County Board of Elections and must submit reports documenting expenditures and contributions. This group developed and paid for signs and other material that supported the referendum. The township’s Environmental Advisory Council provided information and educational assistance on conservation matters. The township paid nothing for the promotion and materials.

CLARIFYING WHAT THE REFERENDUM WAS ALL ABOUT

The PAC strongly emphasized quality of life issues. They stressed that a commitment to preserve land was important to do now and would be a gift to future generations. Preservation is forever. The quality of life in Lower Saucon Township is the reason why so many people moved into the community. About sixty percent are fairly new residents, many living in the more developed west side of the township. During the campaign, the new people supported land preservation, which would likely take place in the more rural and open east side. Conservation in their community mattered. Many of the long-time residents were not so committed due to unknown impacts on their property. However, a supervisor and life-long resident, Sandra Yerger, had preserved her larger property. This commitment added credibility to the preservation issue.

There was also a lack of understanding of what a “conservation easement” entailed. There was a misunderstanding that easements might involve condemnation of properties. It was explained that the purchase of easements did not involve condemnation. In fact, Act 153 of 1996, the state’s authority for municipalities to purchase easements, prohibits the use of condemnation to acquire easements. Still, “conservation easements” had a negative connotation and the term, “conservation agreements” was used to imply that the property owner had to agree and the “conservation agreement” would incorporate the individual’s interests and situation.

There was also a major concern that the use of county and state funds requires public access to properties when conservation easements are sold. It was explained that the “conservation agreements” would not require unlimited public access but might permit limited access for environmental education or for fisherman within limited areas around streams. The agreements could also exclude access for recreational vehicles or access to certain protected areas, such as critical wildlife habitats.
MAKING THE CASE  The township first wanted to ask the public what conservation issues were important to the community. Two written surveys were sent to township residents. The first was sent to a fairly small sample and got a 90 to 95% response. The second, larger sample also got the same level of response, which showed a high level of interest in conservation issues.

Lots of planning, at several levels, provided the basis for the township’s conservation efforts. In 2000, the county published a Natural Areas Inventory (NAI) that identified six top priority natural areas. These are identified in the Comprehensive Plan for Lehigh and Northampton Counties, 2004. The township also had a natural resources and open space plan which identified unique and vulnerable resources including streams, wooded hills and hill tops, unique plants species, vernal pools and seeps, and important habitat areas. The protection of these critical features and areas would be consistent with the goals of the township, the county and the Highlands Coalition, which represents 180 conservation organizations in Pennsylvania, New Jersey, New York and Connecticut.

The Highlands Coalition is dedicated to protecting the 3 million acre Highlands as a source of clean drinking water, wildlife habitat and recreational opportunities for millions of Americans. Water related issues were also compelling for Lower Saucon residents. These included clean drinking water, stormwater management and flood abatement. In very direct ways, land conservation helps achieve these interests.

In order to use any funds raised through the referendum, the township had established goals, criteria and procedures for the evaluation of land. The evaluations would be done by an appointed Open Space Board, which is a subcommittee of the Environmental Advisory Council and is made up of township citizens. Their goals are to focus on qualitative aspects (top quality resource areas, speed of completing “conservation agreements,” connectivity among protected resources, cost) rather than quantitative (protecting the most acres). The criteria are flexible enough to permit the Open Space board to address the high quality land preservation in a timely and cost effective manner.

While the primary thrust of the case for conservation was to maintain and enhance the quality of life in the community, the PAC also wanted to make the case that conservation spending also had economic or tax benefits along the lines of the ideas put forward in Heritage Conservancy’s Opportunity Knocks: Open Space is a Community Investment. One of the PAC members prepared an analysis which showed that dollars spent to conserve land reduces the need for a larger number of school district dollars. This was also done independently by a school board member (another statistician) using actual Saucon Valley data. His conclusions supported the PAC’s findings. The evaluation was submitted to the school district’s treasurer who confirmed that school taxes would likely be saved. The PAC members presented the evaluation at a school board public meeting which was supplemented by a letter to the editor by the school board president. The president’s letter supported the open space referendum and encouraged township residents to vote in favor of the measure. The school board’s support was extremely helpful by adding community leadership weight to the effort.

The PAC members produced a Microsoft PowerPoint® presentation that was used in public meetings to show the many and varied important natural areas located in the community. They also produced written literature, which used local information, photos and statistical data to support the cause. It was felt that a local focus would make the case in a much more convincing way than by using examples from other areas.

Public meetings were held where this PowerPoint presentation and local information were presented. Heritage Conservancy staff spoke at these meetings to describe the environmental, land use, sprawl abatement, fiscal and related benefits resulting from land conservation.

PAC members went to speak with various groups in the community to generate support. It was explained to seniors that an earned income tax would not be placed on social security payments and would likely have no cost impact on them. The members went to fire halls and got their members’ support for the referendum.

The quality of life in Lower Saucon Township is the reason why so many people moved into the community.
Yard signs are important and are most effective when placed in people’s yards rather than in public places. In addition to conveying the message, they show residents’ support.

What is done on Election Day has a critical impact on the referendum’s success. On voting day, referendum supporters manned five polling places all day and two for part of the day. They talked to most people to answer questions and encourage passage. This personal, face-to-face support can make or lose a referendum.

All this was accomplished through the time and efforts of the PAC and EAC members. Township tax money was not involved. Consultants were not hired. The township solicitor provided legal advice without charge.

**A MINOR CRISIS** With all the public outreach and information, an incorrect story in one of the small, local papers caused a stir. It was reported that all the taxes would be increased by 25% (which would have been a significant amount of money), rather than just a quarter of a percent on the 1% earned income tax (which would be a substantially smaller amount of money). Tom Maxfield, a PAC member, quickly wrote a letter to the editor to correct this critical matter and the paper published his explanation. Fortunately, this all occurred well in advance of Election Day. Misleading information or inadvertent errors, when published just before Election Day, are very difficult to address.

**MORE THAN LOCAL BENEFITS** As noted above, land conservation will help achieve a number of water related goals of the township, but Lower Saucon’s conservation efforts are likely to provide benefits for surrounding communities. Hellertown’s reservoir and water recharge area are located in Lower Saucon. For Bucks County communities, a wellhead protection area for Springtown’s water system and part of the headwaters area of Cooks Creek, which is an Exceptional Value stream and runs through an Exceptional Value watershed, are located in this township. What occurs in this portion of Lower Saucon will have effects on these other water systems.

**ZONING** In the prior year, the township adopted a Natural Resource Overlay Zone that limits disturbance in areas containing certain sensitive natural resources. While those standards would protect the resources, development would still take place on the unrestricted portions of a property. Sometimes, it is important to protect an entire piece of land and the use of funds to buy the land or to purchase conservation easements provides the mechanism to accomplish total protection while compensating the owner.

As such, the zoning regulations and the strategic acquisitions of sensitive lands work hand-in-hand for the community and landowners.

**ONGOING CONSERVATION WORK** Prior to the referendum approval, one property was protected using PA Department of Conservation and Natural Resources (DCNR) money and parts of other properties have been protected through the development process. A number of pieces have been acquired for recreation, but the township would like to focus more on the use of conservation easements. Six or seven properties are under consideration.

Letters have been sent to all owners of properties ten acres or larger to invite them to discuss the possibility of selling conservation easements. The Open Space Board works with the landowners and is responsible for evaluating properties based on the criteria established for entering into “conservation agreements.”

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Contributors: Interviews were held with or information received from Sandra Yerger and Tom Maxfield, both are township supervisors and were members of the group that organized and conducted the campaign that resulted in the successful referendum.
Upper Mount Bethel Township
Save or Pave

PASSED: A 0.25% EIT IN THE PRIMARY ELECTION OF 2007
ANNUAL REVENUES: $58,000.00 IN THE FIRST YEAR, 2008;
ANTICIPATED $207,000.00 IN 2009

World-renowned cultural anthropologist Margaret Mead once said, “Never doubt that a small group of thoughtful, committed citizens can change the world. Indeed it’s the only thing that ever has.” Although changing the world was not their goal, three people in Upper Mount Bethel Township took the initiative to change the path that the township was headed. It was evident that the scale and pace of development were about to ratchet up. The choice was clear... “Save or Pave.”

These volunteers knew that steps could be taken to protect important land resources. This started with the Northampton County open space funding initiatives in 2000 and 2002. There had also been five successful referendums in other townships. Neighboring Lower Mount Bethel’s experience was a particularly good example. However, the event that clenched the need to take some kind of action was the filing of a curative amendment challenge to the township’s zoning ordinance. The developer’s challenge would have resulted in a 1,200 home development. This threat to the township focused public attention into taking an active role in the community’s future.

Environmental Advisory Council members Judy Henckel and Michele Arner and Tax Collector Janet Pearson assumed the roles of prime movers to raise local tax dollars to protect important lands in Upper Mount Bethel. All three were active members in the community. The Board of Supervisors appointed these three to be the Open Space Steering Committee, but the supervisors at that time were either ambivalent or mildly supportive of the need to raise local money for conservation.

The Open Space Committee built the efforts on three activities. They were networking to learn as much as possible about running a fund raising campaign from county and conservation organizations and from experiences of other municipalities. They also focused on providing the public with as much information on the proposal as possible. In addition, development of grassroots support for the earned income tax was critical.

**NETWORKING**  The interchange of ideas among municipalities was most helpful. People who played key roles in successful open space referenda in Bushkill, Lower Mount Bethel, Lower Saucon and Williams townships were anxious to share ideas that worked. Mike Kaiser and Melanie Martin of the Lehigh Valley Planning Commission provided valuable information. Staff people from Heritage Conservancy and Wildlands Conservancy provided both information and advice. Heritage Conservancy’s publication *Public Finance for Open Space: A Guide for Pennsylvania’s Municipalities* described relevant laws, financing considerations and a recommended campaign time line. The Open Space Committee members noted they “didn’t have to reinvent the wheel” when there was so much experience and willing help available. No consultants were hired for the campaign.
INFORMATION FOR THE PUBLIC  In order to develop public support, the committee had to reach the public with lots of relevant information. But without any budget for the preparation and distribution of information, the committee had to be creative, resourceful and a bit generous. On home computers, the committee members produced a number of information sheets, posters, hand-outs and palm cards. These pieces used pictures to show the township’s natural beauty and the “alternatives” with lots of homes, cars and traffic lights. Posters appeared in the bank, the tax collector’s office and other public places. Support letters were published in the Easton Express and two free weeklies. Articles were included in the township’s biannual newsletter.

An important point is that, although the development of information for the public involved much effort, there was no cost to the township. Any costs involved in paper and printer ink were born by the committee members. Printed material included a caption “Paid by Citizens for Open Space” to note that no township dollars were used.

BUILDING GRASSROOTS SUPPORT  The township’s comprehensive plan and a Parks, Recreation and Open Space Plan stressed the need to strictly regulate development in sensitive natural features such as woodlands, wetlands and steep slopes as well as to conserve farmland and the rural environment. A survey taken for the open space plan reported 83 to 93 percent support for various questions on conservation. Distributed information highlighted these public interests.

An appreciation of the importance of the natural environment may be a bit higher in Upper Mount Bethel than in other communities. Su Fanok of The Nature Conservancy played a key role in helping the township understand the uncommon value of its natural resources, be it habitat or water resources. The Nature Conservancy’s Study of Areas of Statewide Significance in Northampton County indicated that half such resources in the county were located in this township. See Map 7 Important Natural Areas and Map 8 Natural Features Plan in the Comprehensive Plan: The Lehigh Valley…2030, Lehigh Valley Planning Commission, 2004. The people began to understand that protection of the natural environment was more than just concern with endangered species and included critical concerns with matters including flooding and the protection of water quality. This awareness led to the establishment of the township’s environmental advisory council and to voter approval of money for conservation.

Public information included ten good, concise reasons to vote “yes” on the open space referendum. The importance of a number of quality of life matters were described to make the public aware of the natural beauty of their community, the quality of the local water and scenic views that might be overlooked as people go about their daily business.

In addition to these quality of life issues, a number of financial considerations were explained. Penn State Cooperative Extension’s “costs of community services studies” showed that residential development costs more for services than it generates in taxes. It was noted that the Bangor School District published the cost to educate one child was $11,300 and “with one child per home, we’re in the hole.”

The committee reached out to seniors to explain that an Earned Income Tax (EIT) would not apply to many in this age group, while the addition of many new homes would raise their township and school real estate taxes. An EIT would help manage their tax burdens. Seniors volunteered to offer support at the polls on Election Day.

It was also noted that manufacturing and service jobs have gone global, but tourism is still a local industry. Protection of the township’s natural and cultural features, especially at a gateway to a National Recreation Area with the Appalachian Trail and the Scenic Delaware River, support the local economy and jobs. Pennsylvania ranks fourth among the states in eco-tourism revenues.

Finally, the committee showed that the annual cost to the average family would be small. There were a few grumblers who opposed the referendum, but overall support was strong.

“Never doubt that a small group of thoughtful, committed citizens can change the world.”

—MARGARET MEAD, cultural anthropologist
THE ZONING OPTION  The Open Space Committee members didn’t trust zoning alone to protect important places in their community. Judy Henckel said “Zoning is very risky. Developers and their lawyers can take zoning apart.” However, the township is working with the Natural Lands Trust to incorporate Conservation by Design techniques into the township’s ordinances.

NEXT STEPS  With Heritage Conservancy, the Open Space Committee is in the process of supplementing the open space plan with clearly expressed criteria to be used in the evaluation of properties for conservation. This was a promise made during the referendum campaign. Issues that came up from the public during the referendum were the protection of water resources for their environmental values and for water supply. In cooperation with Portland Borough and Lower Mount Bethel Township, access points to the Delaware River will be looked into.

Coordination with the open space protection efforts of the county and surrounding municipalities is part of the township’s plan.

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Contributors: Judy Henckel, Supervisor and EAC member, and Janet Pearson, Tax Collector, were interviewed for this report and worked hard to get the referendum approved by township voters.
Plainfield Township
Courage to Try Again

PASSED: A 0.25% EIT IN THE GENERAL ELECTION OF 2007
ANNUAL REVENUES: $300,000 LAST REPORTED

In the primary election of 2006, a ballot question to enact an earned income tax failed to get voter approval. The margin against was fairly substantial. Shortly before the EIT proposal was put on the ballot, a controversial zoning amendment was passed and the vote against the open space referendum was backlash on the zoning issue. For those who supported the referendum, the defeat stung a bit, but a number of useful lessons were learned.

The most valuable lesson learned was that a successful referendum must be handled as a political campaign. The approach taken in 2006 was that as a good government initiative. The township’s 1972 comprehensive plan stressed the need for agricultural preservation, but the township back then didn’t know how to implement that goal through either zoning or easement purchases. The township participated in a multi-municipal comprehensive plan in 2004, which also gave agricultural preservation strong emphasis. With the goal of farmland protection held, but not implemented, for more than thirty years, implementation was the responsible thing for the township to do.

But a good idea does not always translate easily into regulations or the spending of public dollars. If people are expected to support a tax increase for conservation, they should expect to be provided with all pertinent information related to that matter.

PUBLIC OUTREACH AND EDUCATION Three groups supported the effort on the second referendum. All the supervisors supported the measure and the board provided some money to produce an informational brochure as requested by the Environmental Advisory Council. In the brochure, the Board of Supervisors stated its support for passage of the referendum. The EAC, established in January 2007, and a concerned citizens group played active roles in public outreach and education activities. The concerned citizens group provided money for mailing a letter of support to township households.

In addition to the attractive and informative brochure, newspaper articles were written and published. A website was established for support. Calculations were prepared that showed the dollars spent on conservation would save more money in local and school district taxes. The working groups felt that a sufficient amount of literature stressed quality of life issues and a “pay now or pay later” case. However, it was felt that word of mouth—neighbor to neighbor—made a real difference in the success of the campaign.

No public meetings were held. Heritage Conservancy and Wildlands Conservancy provided informal, non-paid information and assistance. Other townships were consulted on how they prepared for successful referendums.

The referendum passed with 60 percent approval.
THE ZONING ISSUE  As noted, the zoning amendment resulted in quite a controversy in the community. The amended zoning provisions would result in compact development surrounded by open space, protected farmland and greenway land. The ordinance also provides for transferable development rights to transfer development potential into the sewered district in the township from the Farm and Forest District. Conventional subdivision is still permitted, but the compact development surrounded by protected land results in a greater number of homes. That difference in the number of homes resulting from conventional subdivision versus the incentives for the more compact form of development was the basis for the controversy.

Setting aside the differences in the number of homes resulting from the two zoning approaches, zoning was viewed as a holding pattern. Conservation of important lands needs to be certain and permanent. As such, the referendum was needed to complement the good zoning that helped protect farmlands and natural resources. Zoning can be changed. Purchased land or conservation easements are much more permanent.

Farmland preservation was the community’s primary goal. The township also enacted another zoning amendment that provided benefits for farmed properties. On preserved farms, more than one principal use is permitted. Area and employee standards are more permissive. These all enhance the income potential of conserved farms.

BUILDING ON PAST CONSERVATION WORK  The township has been resourceful in its land protection efforts prior to the passage of the referendum. In this mostly rural and farm community, between 1,900 and 2,000 acres of farmland have been preserved with county and state funds. There’s also about 7,500 acres set aside in Farm and Forest Land. The county has parkland in the township and Plainfield has a 100 acre park. Land conservation was not a new idea to the township people.

In anticipation of the flow of tax revenues for conservation, an EAC subcommittee is in the process of writing guidelines for easement acquisitions. The ranking system includes a “threat of development consideration.” There will be an emphasis on the use of easements on farmland and environmentally sensitive lands. Purchase of conservation easements is a way to stretch the dollars raised.

The Two Rivers Greenway Plan is based on the Lehigh Valley Greenway Plan. The township’s open space and farmland preservation planning uses these two plans as guidelines.

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Contributors: Matt Glennon, Supervisor and EAC member, and Jane Mellert, EAC member and former supervisor, were interviewed for this report. Additional information was provided by Terry Kleintop, EAC member.
Lessons Learned

THE EXPERIENCES OF THESE SEVEN MUNICIPALITIES PROVIDE MANY USEFUL IDEAS FOR OTHER COMMUNITIES TO USE. MANY OF THE IDEAS WERE COMMON TO MOST OF THESE EFFORTS, WHILE OTHER ASPECTS WERE USED OR ADDRESSED BY ONE OR TWO.

GETTING STARTED

- Start early. A year should provide sufficient time to do all that needs to be done. Six months is pretty tight to run a successful campaign.

- Identify or form a committee (EAC, standing Open Space Commission, ad hoc Open Space Committee, etc.) to be responsible for conducting the campaign. Consider forming a Political Action Committee (PAC) to raise and spend money on the campaign.

- Request support from the Board of Supervisors and ask for a commitment to put the question on the ballot.

- Keep in mind that this will be a political campaign and you need to develop support and provide relevant information to the public. It’s essential to make your case clearly and concisely.

- Decide if the referendum should be held with the primary or general election. Primaries tend to draw out issue voters; general elections turn out more voters.

- Decide if professional help should be hired.

- Whenever possible, separate any related amendment to a zoning ordinance from an open space referendum by at least a year.

EDUCATE YOURSELF

- Ask people from communities where successful referendums have been held about what they did, what worked and what didn’t.

- Solicit help from conservation organizations for advice, guidance and useful written material.

- Prepare and distribute a survey to identify what needs to be protected and how much the public is willing to tolerate in new taxes.

- Review the conservation goals in the comprehensive and open space plans. Update the goals if they no longer express the conservation interests of the municipality.

- Consult the municipal solicitor on requirements of Pennsylvania statutes and any other legal questions.

FRAME YOUR CASE

- Clearly articulate the quality of life issues that are important to protect through land conservation. Supplement that message with matters related to fiscal benefits and better management of both municipal and school district taxes.

- Enlist long-time residents, a local champion and people who have preserved their properties to speak in support of the referendum.

- Water issues are top concerns of the public. Explain how land conservation has direct effects on water quality and availability.

EDUCATE THE PUBLIC

- Explain what conservation easements are and how they are applied to properties.

- Explain that conservation easements can be tailored to the landowner’s situation.

- Explain that county and state funds to stretch local money would likely require some limited public access to conserved properties.

- Explain that condemnation cannot be used to acquire conservation easements under the Open Space Lands Act. Condemnation may be used to acquire land for recreation under the Second Class Township Code.
- Explain conservation goals included in the municipality’s comprehensive and open space plans. Explain the municipality’s goals for farmland, natural resources, open space and recreation.
- Explain the evaluation criteria for selecting properties for preservation, if criteria have been developed.
- Explain that Pennsylvania law requires that money approved by referendum has to be kept in a separate account, cannot be put into the general fund and must be used only for the purposes stated in the referendum.
- Explain clearly what types of land is targeted for protection.
- Explain the fiscal and tax benefits associated with land conservation.
- Explain how much it will cost the average family... in most cases it will be a small amount. Equate the annual, monthly or weekly costs to something practical and understandable, such as “The tax will be equal to the cost of one pizza a month.”
- Prepare a PowerPoint presentation or video for public meetings and for display on a municipal or special website.
- Hold public meetings. Enlist the help of outside speakers who have experience in related matters.
- Meet with special groups, like seniors, farmers, environmental groups and recreation organizations. Address their specific interests and concerns.
- Work with local newspapers to tell a good story about how land conservation will provide benefits for the community and surrounding communities, if that case can be made.
- Quickly respond to misleading or incorrect information that’s published in local papers.
- Prepare flyers, postcards, brochures, newsletter articles, letters to the editors of local daily and weekly papers, yard signs, palm cards and other written material. Use local photos, numbers and examples whenever possible.
- Address the zoning issue to explain why zoning isn’t the “silver bullet", but should be used in conjunction with strategic purchases of land and conservation easements. Describe how innovative zoning techniques, like Conservation by Design, open space requirements and resource protection overlays, provide conservation benefits.

DEVELOP SUPPORT
- If an EIT is proposed, explain to seniors that it’s not likely to apply to them and will help to control their real estate taxes. Ask them to work on the campaign and, most importantly, vote for the measure.
- Ask for support from other groups like farmers, environmental groups, watershed associations and recreation organizations.
- Present the proposal to the school board and ask for the support of the board, district superintendent and staff. Ask for support letters to the editors of local newspapers.
- Ask the county, the Kittatinny Ridge Partnership, the Highlands Coalition and others to support the township’s conservation efforts.

WEEK BEFORE ELECTION DAY
- Realize that the last few days before Election Day are critically important.
- Be prepared, as best as possible, for last minute opposition to come “out of the blue”.
- Prepare people to staff the polls. Provide them with useful information and hand-out material.
- Place yard signs on public land and, more importantly, on private properties, with permission.
- Stuff newspaper boxes.
- Organize phone banks for the weekend before.

ELECTION DAY
- Convey a “thank you” to those who supported and provided assistance to aid in the effort.
- Have well-informed people at all the polls to answer questions about the referendum and to encourage people to vote for the measure.
- Pass out palm cards which ask voters to vote “yes”.

Continued
DAY AFTER

- Again, publicly thank all those who supported the effort.
- Celebrate a successful referendum.
- If the referendum fails, figure out what went wrong and plan to try again.
- After the Successful Referendum:
  - Ask the Board of Supervisors, School Board and County Commissioners to agree to freeze millage rates on preserved properties under the provisions of Act 4 of 2006.
  - Update or prepare an open space plan.
  - Develop criteria to select properties for conservation if those criteria have not been established.
  - Appoint a committee to evaluate landowners’ applications for purchase of conservation easements.
  - Send letters to the owners of large properties to explain the conservation program and invite them to consider submitting an application to protect their lands.

Democracy at its Best

COULD THERE REALLY BE A BETTER WAY FOR PEOPLE TO DO SOMETHING POSITIVE FOR THEIR COMMUNITY? This is not big, outside government trying to control, but local folks determining their future. Bill Sweeney, Program Supervisor at the Jacobsburg Environmental Education Center and township EAC member who worked on the Bushkill Township open space referendum said, “This is democracy at its best. All you have to do is participate.”

Those who support and those who may oppose the proposal to raise money for conservation must make their cases to the public, but in the end, it’s the voters, not the elected officials or agencies from other levels of government, who make the final decision.

Why Wait?

THESE SEVEN LEHIGH VALLEY TOWNSHIPS, IN ADDITION TO AT LEAST 80 OTHER MUNICIPALITIES IN EASTERN PENNSYLVANIA, have asked and received voter approval for taxes to protect important lands in their communities. In many of these other municipalities, taxpayers have approved additional requests when the money began to run out or when they saw a need to increase the earned income tax rate to protect more land in a shorter time period. Many of these municipal officials have commented that they should have started preserving land years ago before much of the good lands were developed, prices have risen and municipal and school district costs have skyrocketed. As Will Rogers advised, “Buy land. They ain’t makin’ any more of it.” We might add, “It ain’t gettin’ any cheaper, either.”

Why wait to talk among your municipal officials if raising money for land conservation won’t maintain or improve the quality of life in your community? Why wait to talk with the public officials in these seven municipalities to learn about their experiences and why they were successful? Why wait to hold a public discussion or survey your citizens to find out how they feel about raising money for land conservation? Why wait to put a question on the ballot to let your voters decide if they are willing to raise public funds to protect important lands?

The issue is not to stop development; rather, it’s to balance responsible growth with the protection of key community resources. It’s that balance that is important. But the time to move forward is now. When the land is developed, its resource, scenic and agricultural values are truly gone...forever.
Useful References

Key pieces of legislation are Act 153 of 1996, Act 138 of 1998 and Act 4 of 2006. To download copies of these laws, go to www.legis.state.pa.us and “Legislation Enacted Since 1975.” Follow the prompts to fill in the act numbers and years of enactment.

Heritage Conservancy’s publication Public Finance for Open Space: A Guide for Pennsylvania’s Municipalities includes information on lessons learned for municipalities outside of the Lehigh Valley, the provisions of related state laws, various ways to finance conservation and other matters. Also see Opportunity Knocks: Open Space is a Community Investment and Growing with Green Infrastructure. These reports may be accessed on Heritage Conservancy’s website www.HeritageConservancy.org or copies may be requested from the Conservancy.

Timothy W. Kelsey, Professor of Agricultural Economic, Penn State’s College of Agricultural Sciences, has prepared a number of costs of community services studies throughout Pennsylvania. These studies help in the understanding of the relative costs associated with different forms of land development and can help make the case for raising funds for conservation. Copies of his short, very readable report, Fiscal Impacts of Different Land Uses: The Pennsylvania Experience in 2006, are available on the web at www.cas.psu.edu, by calling (814) 865-6713 or writing to 112 Agricultural Administration Building, University Park, PA 16802.

The important plans of the Lehigh Valley Planning Commission noted in this report may be secured on the web at www.lvpc.org, by calling (610) 264-4544 or writing to 961 Marcon Boulevard., Suite 310, Allentown, PA 18109-9397.

Acknowledgements

With over 50 years of experience in land conservation, historic preservation and environmental education, Heritage Conservancy is an accredited not-for-profit organization that specializes in preserving our natural and historic heritage. Wildlands Conservancy is a non-profit, member-supported organization that has been dedicated to land preservation, river restoration, trail development and environmental stewardship through education for the past thirty-five years. This report was prepared by Michael Frank, Director of Community Planning, Heritage Conservancy; and Scott J. Cope, Chief Program Officer, Wildlands Conservancy.

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