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LTA can be reached at 202-638-4725; fax: 202-638-4730; Web site: www.lta.org. General e-mail: lta@lta.org.

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Photo by Paul Rezendes

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Better Conservation Through Partnerships

by Martha Nudel

ON DECEMBER 3, 2002, ALMOST 100 PEOPLE braved frigid temperatures to dedicate the North Quabbin Bioserve, one of the largest contiguous tracts of forestland in southern New England and only Massachusetts' second bioserve, protecting an area large enough to allow landscape-level ecological processes to function.

The event capped a two-year partnership between the state's Executive Office of Environmental Affairs (EOEA) and Mount Grace Land Conservation Trust (MA), which acted as a broker for the state in negotiating the purchase of conservation easements and finalizing 104 deals to protect more than 9,100 acres in north-central Massachusetts—a testament to what a public-private coalition can accomplish.

With land trusts increasingly anxious to undertake landscape-scale conservation, initiatives that combine the expertise and funding abilities of nonprofit organizations and public agencies are an ever more effective means of protecting important lands. In the Tully watershed, a two-year initiative has proven the value of such cooperation and coordination.

"The initiative is an excellent example of a successful partnership between the land trust community and state agencies," said Leigh Youngblood, the land trust's executive director. "Working through the land trust, the state developed a cutting edge program in land conservation that accomplished significant 'de-fragmentation' of a landscape that was divided into hundreds of ownerships."

Bob Durand, then Massachusetts' Secretary of Environmental Affairs, launched the Tully Valley Private Forest Lands Initiative in late 2000 to help fulfill the governor's



More than 100 land conservation deals were negotiated by Mount Grace Land Conservation Trust (MA) for two state agencies as part of the two-year Tully Valley Private Forest Lands Initiative.

Courtesy of Mount Grace Land Conservation Trust

promise to protect 200,000 acres in a decade. Mount Grace was selected as the lead land protection negotiator for two state agencies, Fisheries and Wildlife and Environmental Management, only after winning the state's competitive bidding process. Two other nonprofit Massachusetts land trusts, The Trustees of Reservations and the New England Forestry

Foundation, became involved in land conservation deals when they had long-standing relationships with specific landowners.

At the initiative's launch, Mount Grace had two full-time staff members and an annual operating budget of just over \$100,000. By December 2002, when the initiative was finished, Mount Grace had six staffers, including two part-time positions, and a budget of \$260,000. The land trust hired a full-time land protection specialist to handle land protection deals not associated with the Tully Initiative and a temporary documentation specialist dedicated to the Tully Initiative. Ms. Youngblood hopes to retain all but one of the positions now that the contract has been completed.

A "Can-Do" Partner

Early in the conservation process, EOEA knew it needed a "can do" negotiating partner to talk with skeptical landowners and keep to a challenging timetable. Mount Grace, which, since its establishment in 1986, had concentrated on connecting green corridors and expanding existing conservation lands in its mostly rural 23-town region, had again proven its brokering ability during the 1998 state acquisition of Tully Mountain. (See sidebar, page 19)

"Mount Grace had been well known and well respected in

the area for years before the Tully Initiative,” noted Kristin Foord, EOEAs land project coordinator. “Local landowners are somewhat wary of state government involvement because the project area is just north of several towns that were taken by eminent domain in the 1930s and flooded to build an enormous drinking water reservoir for Boston. So having a trusted local nonprofit organization as the ‘face’ of the initiative made the project much more palatable to the landowners.”

EOEA had good reason to select the Tully watershed as a conservation focus area: its large blocks of forestland were vulnerable to haphazard residential development. In the last 15 years, the surrounding region lost 66,000 acres of forestland and the population grew on average by 6-10 percent each year as the suburbs of Boston, Amherst and Worcester burgeoned. *Thinking in Forest Time*, a 1999 research report by Harvard University, identified the area as being ideally suited for preserving large blocks of forestland to ensure a healthy local economy from timbering and to protect the region’s biodiversity.

“Bob Durand was captivated by the beauty of the Tully area,” recalled Ms. Foord, “and he was inspired to protect the expanse of forest. The Tully Loop Trail on Tully Mountain was an excellent anchor for the land protection effort. And strong local land trusts—the final piece of the puzzle—fit perfectly into place. All that made the Tully area the only one EOEAs ever considered for such an ambitious and innovative project.

“Bob was also impressed with Leigh Youngblood’s energy, ambition, outspokenness and innovative ideas,” Ms. Foord continued. “Her passion for land protection and her skill at negotiating complicated deals were also important factors in EOEAs decision to choose Mount Grace for the job.”

Organized To Conserve Land

Once Mount Grace was selected to lead the negotiations, basic organizational work had to be completed. Easement language was tailored for the initiative, recognizing both the natural and cultural elements of the landscape. The easements allowed for sustainable management of forestry and agricultural resources, and promoted recreation, fishing and hunting. “Hunting and forestry are integral to this rural region,” noted Ms. Youngblood.

The initiative had a direct impact on the land trust. “Our headquarters are located in the Tully watershed, so the favorable local attitudes about the initiative were transferred to us,” noted Ms. Youngblood. “We got a lot of the credit for helping a substantial number of local landowners get paid for protecting their private land.

“In other words, the state brought financial resources to exponentially accelerate our mission,” she continued. “And our supporters in the region and beyond—people who have seen the results—are rewarding our organization with increased financial support.”

During a three-month phase to test the feasibility of such broad scale conservation, 25 landowners, all in the center of the project area, were handpicked to receive extensive infor-



Courtesy of Mount Grace Land Conservation Trust

The Tully watershed’s large blocks of forestland had been vulnerable to haphazard development.

mation about conservation easements and forest stewardship. The information packets were followed up with telephone contact. Ultimately, five land protection projects closed.

Using the experience culled from the three-month test, Mount Grace mailed condensed informational packets during the initiative’s first year to 400 other owners of 20 or more acres; 38 landowners eventually sold conservation easements on their property. A total of 540 landowners were approached for the first time or re-contacted during the second year, which saw 61 closings.

“Our materials mentioned that landowners could get appraisals without any obligation to sell a conservation easement. That was important to many people,” said Ms. Youngblood. “We also mentioned their neighbors who were participating and stressed that easements would allow continued forestry and farming on their land. The general concept of easements, although new to many, resonated with landowners who appreciated the natural beauty of the area.”

A Daunting Timetable

The Tully Valley Private Forest Lands Initiative took place under the daunting constraints of the state, which usually requires that all projects follow a specific identification, prioritization and approval process. While the state also requires all active projects to be finalized by the end of fiscal year in June, the two-year Tully Initiative spanned three fiscal years. Moreover, Mr. Durand set an ambitious agenda: 5,000 acres to be protected in the first year alone, and development rights purchased for no more than \$1,000 per acre. Mount Grace was not assured a second-year contract unless it demonstrated real results in the first year.

“Looking back, the state’s stringent guidelines caused interested landowners to come to decisions pretty quickly,” reflected Ms. Youngblood. “Certainly we lost some projects because the time for decision-making was too short for some, usually for people on working farms where the consequences of a permanent easement had very significant impacts. We didn’t have a lot of time to spend with individual landowners.”

But Ms. Youngblood also believes the two-year timeframe

(continued on page 21)

Inspiration on a Mountaintop

The North Quabbin Regional Landscape Partnership, formed in May 1997 by 25 public and nonprofit organizations, may well have given birth three years later to the Tully Valley Private Forest Lands Initiative.

Created to coordinate regional land conservation, the North Quabbin partnership consists of public agencies and nonprofit conservation and educational organizations, including Mount Grace Land Conservation Trust and the Massachusetts Department of Environmental Management. The partners began their work by fashioning a mission statement: "Collaborate to identify, protect and enhance strategic ecological, cultural and historic open space within the rural landscape of the North Quabbin region."

They then endorsed conservation of Tully Mountain as their signature project with Mount Grace taking the lead. Located about three miles from downtown Athol, Tully Mountain is on the edge of the North Quabbin corridor, the largest contiguous expanse of forestland in southern New England.

Owned for nearly a half-century by Roy Wetmore, Tully Mountain was a beloved landmark with an informal hiking trail that had never been posted against trespassing. When Mr. Wetmore and his widow died, their nephew, a noted conservationist and one of several heirs, negotiated the sale of 330 acres on the mountain, guaranteeing it would never be cordoned off from public use.

In March 1998, Mount Grace made a \$160,000 nonrefundable deposit on an option to buy the land while negotiating its acquisition by the state Division of Fisheries and Wildlife. The state purchased the land in July 1998 and reimbursed the land trust for the deposit. Eventually 1,200 acres on the mountain were protected.

The first phase of the Tully Mountain acquisition was heralded by a public celebration that drew many state environmental officials and local residents, including 78-year-old Robert Stone, who had walked up and down Tully Mountain almost daily for 38 years.

Building the Loop Trail

With a strong push from the National Park Service, the North Quabbin partnership also worked to create the 18-mile Tully Loop Trail to connect local trail segments from the mountain's summit to the cascading waters of Doane's Falls. When the idea was aired in 1998, just half of the trail was built on protected land. Today, less than one mile of the trail crosses land that is not publicly protected.

Mount Grace and a private conservation buyer joined to help the Department of Environmental Management protect the second phase—180 acres in the Wetmore estate and a one-mile stretch of the Tully Trail—by a combination of a conservation easement and fee title. This time, the celebration took place at a prominent overlook along the Tully Trail, giving then Secretary Bob Durand a spectacular view of this breathtaking valley. He was so inspired that he conceived the ambitious and innovative Tully Valley Private Forest Lands Initiative.

While nearly all of the Tully Trail land has been protected by state agencies, each partner played an active role in its development. Mount Grace organized volunteer trail building days while The Trustees of Reservations published a map for public distribution. The state Division of Fisheries and Wildlife authorized construction of a parking area, and the National Park Service funded a professional trail designer. The US Army Corps of Engineers leased lakeside land alongside the trail for a wilderness campground, while the New England Forestry Foundation trained forest guides and promoted economic uses of open space, including locally made wood products.

"None of the organizations would have undertaken a project like the loop trail on their own. It was just too large," said Leigh Youngblood, executive director of Mount Grace. "The partnership made this rapid pace of on-the-ground results possible."

The Partnership Carries On

The North Quabbin partnership has not stopped its work. The full partnership meets quarterly as does its executive committee. Meeting minutes are distributed to keep partners informed and to document actions. Partners are still suggesting new projects for endorsement.

For now, each North Quabbin partner has upkeep responsibility for the Tully Trail. "A relatively small, concerted effort by each organization resulted in an outcome that each could take pride in and credit for," Ms. Youngblood said. ■

Better Conservation *(continued from page 18)*

meant that progress was quick. “Highly motivated owners went forward in the first year because they knew that funding was not guaranteed for the second year,” said Ms. Youngblood. “In the second year, skeptical landowners saw those in the first year getting paid for protecting their land and happy with the process. That was certainly an incentive.”

The state also streamlined some procedures. For example, one appraisal company handled all the projects and offers were based on these appraisals. The public agencies had just five days to question the appraisals, or Ms. Youngblood was authorized to use her professional judgment to make an offer. If a landowner in the project area agreed to the price, the project was automatically approved by the state.

“Each week, I went down the list of projects with the state agencies and we moved projects forward, almost like an assembly line. Complications were dealt with in short order or the project was eliminated as not being feasible,” recalled Ms. Youngblood.

The intense months spent hammering out standardized easement terms at the initiative's inception produced a solid document that landowners considered reasonable. As much as possible, the “permitted activities” section anticipated landowners' practical concerns. For example, easements allowed landowners to timber a certain amount of cordwood for their own use without requiring a forest stewardship plan. Agricultural uses were permitted “by right” except converting forest to field, construction of agricultural buildings and activities that could degrade water quality.

Indeed, easements even banned use of motorized recreational vehicles—a common activity in this rural area—except when the landowner asked permission for himself and his family. “Our criteria were to protect as many acres as possible and to minimize the area where no public access was permitted,” stressed Ms. Youngblood. “Based on our long experience in the community, we anticipated which questions about restrictions would arise.”

Working As A Team

Organizational compromise between Mount Grace and the state agencies did not always come easily. For example, disagreements occurred on whether projects that encountered title problems were worth the extra effort. In another instance, Mount Grace found a donor to make a contribution to meet a landowner's counter offer—something the state agency could not do.

“While state land protection programs have fixed mandates and processes that are fairly rigid,” noted Ms. Foord, “the strength of a land trust is often its ability to be flexible and creative and structure unique deals in order to close a project. But a land trust must be willing to work within the state's fixed structure, and understand why the state land staff cannot meet them halfway.”

“When you take on a project like this, you have to keep foremost in your mind that innovative land conservation—by its very definition—entails doing things differently,” said

Ms. Youngblood.

When a deal was reached, Mount Grace notified the EOE project coordinator about the price and acreage. Utilizing the agencies' independent documentation systems, Mount Grace prepared all contracts, authorizations and easements, mailed them to landowners for their signatures and then e-mailed copies to the agency. The land trust was performing the role usually carried out by the agencies' land agents.

The legal staff of each agency managed the title issues, public notices and other procedural requirements after they received the signed paperwork.

“By contracting with Mount Grace to do the landowner outreach and negotiations, we not only derived the benefits, but we also freed the state agencies' regular land agents to continue their regular work,” stressed Ms. Foord. “A key factor in persuading the state agencies to enter enthusiastically into the Tully Initiative was because it was a project that was to be completed in addition to their annual list of land protection projects, which are often lined up a year or more in advance.


“The agencies' land agents would not have been able to devote the time needed to make the Tully Initiative a success while also completing their regular duties,” she concluded.

Building Relationships from the Start

After two years of work and many negotiations, 20 percent of the available land in the project area has been protected. The rural character of the Tully watershed is better preserved, and the Tully Loop Trail is 98 percent complete. Fragmented parcels of forest have been consolidated, which will make forest management far more cost efficient.

Although Mount Grace has not undertaken a financial analysis of the Tully Initiative's impact on its local support, Ms. Youngblood believes the land trust's profile has been substantially boosted. “It has reinforced our longstanding reputation as a results-oriented land trust,” she observed. Since its founding in 1986, Mount Grace Conservation Land Trust has protected more than 17,000 acres, including the acreage protected through the Tully Initiative.

“Landscape-scale conservation is very difficult to achieve alone, but by working in partnership and utilizing the strengths of each group, state governments and land trusts can imagine and complete larger and more ambitious projects than were previously possible,” concluded Ms. Foord.

Ms. Youngblood has some parting advice for land trusts that undertake landscape-scale conservation: “When the inevitable difficulties or unexpected elements emerge, the process will move forward if negotiations are based on a person-to-person working relationship. Don't just rely on the paperwork and contracts, but build trust and cooperation into the relationship from the start by conducting every negotiation as if it were riding solely on a handshake.” 

Martha Nudel, formerly LTA's director of communications, works for the Land Trust Alliance as a consultant, acting as Executive Editor of *Exchange*.