

## **Workshop Descriptions**

### **Session A; Friday, March 19, 2021 (9:15 am - 10:30 am)**

#### **A1. The Intersection of Conservation and Indigenous Peoples' Access to Land**

*Ciona Ulbrich, First Light and Maine Coast Heritage Trust*

In this country, there is a 400 year history of Indigenous dispossession from the land. Conservation has undeniably been a part of this theft, but in this moment we have an opportunity to build a movement that recognizes history and truth and works to make amends. How can we as conservationists engage with Indigenous communities to move forward and transform conservation? What steps can we take to restore land access and stewardship for Indigenous people? I will draw on ongoing collaborations to share land and resources between Tribes and conservation organizations in Maine and elsewhere to answer these questions.

#### **A2. Protecting Natural Climate Solutions**

*Brendan Annett, Buzzards Bay Coalition*

*Caitlin Chaffee, Narragansett Bay National Estuarine Research Reserve*

*Steve Long, The Nature Conservancy*

The problem of climate change requires large scale global solutions which we all need to contribute to at various levels as individuals, as organizations and through our governments. Land conservation organizations are well positioned to play an important role in this by advancing Natural Climate Solutions, which include the conservation, restoration and management of land to increase carbon storage, reduce greenhouse gas emissions and improve the resilience of ecosystems helping both human and natural communities to better adapt to climate impacts. State governments have begun partnering with municipalities, land trusts and other conservation organizations to identify, innovate and implement these Natural Climate Solutions in our forests, grasslands, wetlands, rivers, coasts and farmlands. In this session participants will be introduced to the variety of activities that are occurring in both Massachusetts and Rhode Island to encourage the protection, restoration and management of lands specifically for the purpose of addressing problems associated with climate change. Successful existing examples of projects that have been implemented will be described to help prompt discussion of how our organizations can better incorporate these solutions into our work moving forward.

#### **A3. Working with Farmers**

*Joyce Meader, The Livestock Institute of Southern New England*

*Guy Steucek, Dracut Land Trust*

*Stephen Hall, Nallie Pastures*

*Kesiah Bascom, OffBeet Compost*

Demand for locally produced, fresh, wholesome and nutritious food is strong. Local food production can benefit a community a number of ways. Access to land is the primary roadblock to new farmers and land trusts represent a good source of ground. Farming can be an excellent way to manage open space, but can also lead to environmental degradation. This workshop will address how a land trust can work with farmers to maintain a property, generate income, produce wholesome products, observe governmental statutes, be inclusive, equitable, and diverse, using regenerative farming protocols. The presenters will

discuss conservation farm leases that protect soil, water and wildlife and forest stewardship plans that manage woodlands to enhance wildlife habitat and improve forest health for future timber harvest.

#### **A4. State & Local Funding Options in Massachusetts & Rhode Island: Profiles of a successful local bond campaign and state grant opportunities**

*Melissa Cryan, MA EEA*

*Alex Chuman, Aquidneck Land Trust*

*Gretchen Markert, Aquidneck Land Trust*

*Nathaniel Thomas, MA EEA*

This workshop consists of two parts: Aquidneck Land Trust (RI) will speak about successfully working with municipalities in its service area on local open space bond campaigns, most recently in November 2020. We'll cover working with town leadership, the outreach campaign to voters and how we used a development impact analysis to make the case for more open space conservation, and how successful bonds have translated to land acquisition successes. Massachusetts staff will discuss how the Division of Conservation Services has used both funding and Open Space and Recreation Planning to implement and incentivize the state's Environmental Justice policies over the years, in addition to general overviews of the conservation and recreation grant programs offered by the Division.

#### **A5. Conservation Restrictions: Avoiding Current Red Flags for the IRS in Drafting and Filing**

*Diana Norris, Land Trust Alliance*

*Stephen Small, Law Office of Stephen J. Small, Esq., P.C.*

The easement donor and the land trust both have a very strong desire to protect the land. In addition, with a deductible easement the easement donor has a very strong desire to avoid an audit. In current IRS audit activity, and in recent "adverse" court decisions, we have seen the attention of the IRS and the courts drawn to a surprising number of "red flags" in conservation easement deeds and related documents. In this workshop we will (quickly) run through a short list of some of the "hot issues" in conservation easement work, make some recommendations, and give you some tips: (1) deemed approval; (2) proceeds; (3) baseline; (4) inconsistent use; (5) "movable" building areas; (6) substantiation (appraisal, 8283, etc., gift letter, effective date for deduction purposes, donations by cash or check), and filing; (7) amendments; 8) a few examples of how "running the numbers" on tax results is a very good thing for the donor to do.

#### **A6. Building a Major Donor Program from the Ground Up**

*David Allen, Development for Conservation*

Effective, sustainable, built-for-the-long-haul organizations are continually engaged in annual gift, major gift, and planned-gift activities with individual donors as their primary source of charitable gift revenue. Yet for many organizations, grant-writing, event management, and membership systems often seem more urgent, leaving major gift fundraising – building and sustaining relationships with individual donors – undone. Participants in this workshop will learn: the motivations behind major gift decisions; how to find major gift prospects; how to develop creative cultivation activities; and the differing roles of staff and Board. We'll also look at several of the basic tools needed for success. This workshop is appropriate for all levels of fundraising experience.

#### **A7. Building Climate Action Ambassadors Through Community Based Land Trusts**

*Kate Durkin Cook, Lowell Parks & Conservation Trust*

*Lucy Gertz, Mass Audubon*  
*Kris Scopinich, Mass Audubon*  
*Alexandria Vecchio, Mass Audubon*

This workshop will focus on the role community-based land trusts play in moving the communities they serve to take meaningful action to address climate change. In particular, the workshop will provide examples of how Mass Audubon and the Lowell Parks and Conservation Trust are leading youth to serve as conservation stewards and address climate change in their schools and communities. We will offer different examples of programs that our organizations have developed to increase climate action and connect those programs with conservation behavior research and best practices for moving people to action on this important issue. Finally, we will share how land protection and enhanced ecological resilience through nature-based climate solutions can provide opportunities for learning and engagement at all ages.

## **Session B; Friday, March 19, 2021 (1:45 pm - 3:00 pm)**

### **B1. Land Trusts & Food Justice: Expanding Access to Farming & Gardening Opportunities**

*Margaret DeVos, Southside Community Land Trust*  
*Hannah Spare, All Farmers*  
*Vidya Tikku, The Trustees*

Conservation organizations are uniquely positioned to acquire and/or protect an increasingly precious commodity -- arable land. Whether in urban gardens or larger-scale farms, making land available for food production can be a powerful way to expand access for long-excluded communities, forge relationships with new constituencies and address community needs. Join our panel as we reflect on motivating questions about for whom we are conserving land and maximizing community benefit in addition to acres. Learn about the day-to-day practicalities – from Board buy-in to building partnerships and internal capacity – needed to deepen your organization's impact and apply an equity lens to conservation work.

### **B2. Adapting to Sea Level Rise: Climate Adaptation and Land Preservation for Salt Marsh Ecosystems**

*Michael Bradley, University of Rhode Island*  
*Wenley Ferguson, Save the Bay*  
*Adrienne Pappal, MA Office of Coastal Zone Management*  
*Danielle Perry, Mass Audubon*

This workshop will address the threats coastal lands are facing due to climate change and actions Massachusetts and Rhode Island coastal managers are undertaking to preserve these habitats. We will describe the impacts of sea level rise on salt marshes and the ongoing efforts to preserve coastal lands and potential salt marsh migration corridors. Dr. Danielle Perry from Mass Audubon, will share the results of coastal climate vulnerability assessments describing expected sea level rise impacts on Massachusetts salt marshes as well as provide examples of Rhode Island and Massachusetts climate adaptation projects. Michael Bradley from the University of Rhode Island will discuss a web tool that will visualize salt marsh migration corridors and identify potential conservation opportunities. The presenters will discuss how these projects will improve the surrounding communities' resilience to sea level rise.

### **B3. White-Tailed Deer and the Future of Our Forests**

*Jeff Collins, Mass Audubon*

*Susan McCarthy, Mass Wildlife*

*Kristin O'Brien, Sudbury Valley Trustees*

White-tailed deer populations are above or approaching ecological carrying capacity throughout large parts of Massachusetts. Their intensive and selective browsing pressure can dramatically alter forest understory habitat, threaten rare plants, favor the spread of invasive plants, and lead to cascading negative impacts throughout the entire ecosystem. Perhaps of greatest concern, they suppress the growth of saplings that would become the next generation of our forests. We will provide some background on how deer populations are managed, factors that lead to high deer densities, and methods used to assess their impact on wildlife habitat. We will also discuss the experiences of Mass Audubon and Sudbury Valley Trustees in estimating deer density, assessing browse damage, and working with hunters to manage white-tailed deer.

### **B4. Anatomy of A Real Estate Transaction**

*Reggie Hall, The Conservation Fund*

New to land conservation work? Or just interested in learning more about the "nuts and bolts" of making deals happen? This session will dissect several typical land conservation projects, including both fee and easement transactions, looking at many recent case studies of projects from around the country. From start to finish, you will "learn the ropes" and receive helpful pointers including but not limited to project selection, negotiating the deal, project funding (including stewardship!), donor cultivation, and more!

### **B5. Conservation Restriction Enforcement Roundtable**

*Buzz Constable, Mass Land Trust Coalition*

*Steve Haire, Conservation Attorney*

*Rob Warren, The Trustees*

Stewardship enforcement issues range from inadvertent to intentional, minor to catastrophic, informally resolved to appellate litigation, with resolutions ranging from compromise to restoration to mitigation to financial damages. A panel of seasoned professionals from Rhode Island and Massachusetts will provide a brief overview of preparation for and procedures within CR and fee enforcement, including illustrations and the evolving case law. The roundtable format will allow attendees to summarize problems which have been faced, with discussion about alternative resolutions which may be most appropriate and various techniques to achieve them. Questions and brief fact patterns may be submitted in advance to [Buzz@massland.org](mailto:Buzz@massland.org)

### **B6. Building Engagement with Social Media and Email Campaigns**

*Michael Tobin, Wellesley Conservation Council*

*Hillary Truslow, Mass Audubon*

Hear how the Wellesley Conservation Land Trust (45+ acres protected) and Mass Audubon (38,000+ acres protected) have each learned to use Facebook, Instagram, Twitter, email software (including free MailChimp), local blogs, newspapers, and postal mail to get the word out, build name recognition, engagement, volunteerism, and ultimately raise more donations. We can't call them "best practices,"

but we think we've each developed some good practices from both a small and large land trust perspective that we'll share with you. From promoting events to driving engagement to donations and annual memberships, we walk you through how we're doing it with straight forward real-life examples. Is it time you improved your social media strategy and dropped Excel for a more robust mail list system? We'll leave time for questions and discussion on lessons learned.

#### **B7. Conservation Organizations Partnering to Address Affordable Housing Needs**

*Brendan Annett, Buzzards Bay Coalition*

*Don Keeran, Association to Preserve Cape Cod*

*Kristin DeBoer, Kestrel Land Trust*

Many conservation organizations work in regions where housing affordability is a significant and growing community concern. Land conservation can sometimes be seen as contributing to the problem by taking developable land off the market and raising property values. Short of revising their missions or developing internal expertise related to housing, how can land trusts demonstrate sensitivity and willingness to partner around broader community needs? Presenters will share the origins and results of APCC's work with Housing Assistance Corporation to map the best places to develop affordable housing while minimizing impacts on Cape Cod's environmental resources; a case study from Wareham where partnering with an affordable housing provider was integral to protecting a key riverfront parcel; and examples of projects in the Pioneer Valley where affordable housing and conservation were accommodated on a single parcel, with Community Preservation Act funding supporting both components.

### **Session C; Saturday, March 20, 2021 (9:15 am - 10:30 am)**

#### **C1. All Person Trails**

*Lucy Gertz, Mass Audubon*

*Ray Lyons, Conservation Attorney*

Land trusts across our country are awakening to the needs of people with disabilities and taking action to invite them into their properties. Mass Audubon, for example, is steadily working to make wildlife sanctuaries and nature centers more welcoming and inclusive. We'll share what Mass Audubon learned while developing 16 All Persons Trails since 2008. In addition to funding, design, and construction, Mass Audubon developed a national model for creating self-guided, universally-designed, interpretive tours for trail users of all abilities. Accessible signage, seating areas, and other visitor amenities will be highlighted. We'll also touch base on topics such as designing your web page to help those with disabilities and "traps for the unwary" regarding wheelchairs, motorized devices, and service animals.

#### **C2. Environmental Justice in a Climate Changing World**

*Leah Bamberger, City of Providence*

Last fall, Providence, RI's Mayor Elorza released the city's Climate Justice Plan, one of the first reports that analyzes the root causes of climate change through a justice lens. The Plan was created in collaboration with the Mayor's Office of Sustainability and members of the Racial and Environmental Justice Committee. It aims to create an equitable, low-carbon, and climate-resilient Providence through

a comprehensive set of proposed policies and initiatives. This workshop will review plan development and describe the projects underway to implement the plan's strategies.

### **C3. Edible, Medicinal and other Culturally-significant Plants - Recognizing, Respecting and Restoring Traditional Uses**

*Russ Cohen, Naturalist, Wild Food Enthusiast & Native Edible Plant Propagator & Planter*

*Rachel Beth Sayet, Educator*

*David Vanderhoop, Sassafras Earth Education*

Before European colonization and settlement began four centuries ago, the indigenous inhabitants of the region now known as New England held its lands and waters, and the plants and animals living there, with reverence and respect, as do their descendants today. Tribal people deployed "TEK" (traditional ecological knowledge) to sustainably manage and harvest patches of wild plants for food, medicine, and other cultural practices. Access to land for these purposes has been greatly curtailed, however, mostly by land privatization and development, but also by some conservation land managers' well-intended, but perhaps unduly strict, prohibitions against foraging. This workshop will present an indigenous perspective on the land, and its gifts, and how we may give back in return. It will also cover at least a dozen species of native plants with food and/or medicinal values, and where such plants could be planted (or may already be found) on conserved lands. The workshop will also look at the feasibility of reopening land trust and other conserved lands to plant gathering and other traditional practices by Native Americans and others seeking to do so in a respectful way. Examples of Cultural Respect Agreements between land trusts and tribal groups will be shared.

### **C4. Basic Real Estate Transactions and Contracts for Land Trusts**

*Deborah Eliason, Eliason Law Office, LLC*

*Joanne Riccitelli, South Kingstown Land Trust*

This workshop will walk the participants through a simple real estate transaction involving the acquisition of a fee interest or conservation easement/restriction in real property. Some examples of documents will be provided and discussed, with an emphasis on important provisions. The goal of this workshop is to provide non-lawyers with a basic understanding of the acquisition process and provide practical advice on each step. We will address the basics of drafting a legal document so that legal review can be expedited. The cost of legal review can be reduced if attention is paid to the form of the document and checking and/or correcting the names of the parties, deed references, authorized signatories, etc. This workshop is intended to be a practical guide, but not an exhaustive discussion of the acquisition documents or process. Internal Land Trust communication and approval procedures are not addressed here.

### **C5. Building Relationships with Your Elected Officials**

*E. Jenny K. Flanagan, Warren Land Conservation Trust*

*Stephen Kulik, Retired State Legislator*

*Emily Myron, The Nature Conservancy*

Both land trusts and their state/local elected officials benefit from a strong, reciprocal relationship. This workshop will be focused on how land trusts can build these relationships, with a goal of both supporting their on-the-ground work and influencing relevant policy decisions. Learn best practices for reaching out to and engaging your legislators, regardless of the size of your land trust. Panelists will share experiences ranging from strategic relationship building by an all-volunteer land trust to engaging

on statewide policy. The panel will also include a retired state legislator, who will share his experience collaborating with land trusts to pass critical legislation to advance conservation. Participants will leave the workshop with a clear toolkit for how to begin engaging their legislators, how to collaborate with them, how to turn your local story into a compelling message, and how to build a long-lasting relationship.

#### **C6. Strategies for Sustaining Small Land Trusts**

*Connie Manes, Organizational Development Consultant & Kent (CT) Land Trust*

*Bob Wilber, Stow Conservation Trust*

*Mike Huguenin, Mattapoissett Land Trust*

Between managing membership and fundraising, recruiting and training good volunteers, and staying on top of best practices for land protection and stewardship, running a successful land trust is no small feat. How do you attract the resources needed to maximize impact? How do you stay vital when the trusted leaders are ready to pass the torch? Consultant Connie Manes and leaders of two all-volunteer land trusts will share challenges, successes, and lessons learned, and encourage you to share your own.

#### **C7. Engaging the Next Generation**

*Rachel Calderara, Brockton High School Envirothon Program*

*Yvette Garcia, Groundwork Lawrence*

*Trevor Smith, Land Escapes*

Learn how members of the conservation community and land care professionals are connecting with the next generation to provide outdoor experiences and opportunities to explore green careers. Wildlands Trust has been partnering with Brockton High School's Envirothon program since 2015 to support youth as they learn about forestry, soils, water and wildlife, and research environmental issues impacting their community. Groundwork Lawrence's Green Team is a year-round program that offers part-time, paid positions for high school aged youth to learn about and lead local environmental and public health initiatives, challenge peers to do community service, and participate in hands-on improvement projects. The presenter is a program alumna, so she is able to share a unique perspective. The private sector offers valuable training opportunities for underserved young adults who are eager to make a difference. A regenerative landscape designer and entrepreneur will share how he includes these young adults in desperately needed green infrastructure projects.

### **Session D; Saturday, March 20, 2021 (1:45 pm - 3:00 pm)**

#### **D1. Indigenous and Settler Partnerships at the Intersection of Place Based Learning and Mindfulness**

*Micah Mortali, Kripalu School of Mindfulness Outdoor Leadership*

*Shawn Stevens, Stockbridge Munsee Band of Mohicans*

In this workshop join Stockbridge Munsee Mohican Representative, Shawn Stephens and Founder of the Kripalu School of Mindful Outdoor Leadership founder, Micah Mortali for a conversation of our complicated relationship with place. Drawing on Indigenous and Settler perspectives, Shawn and Micah will share their experience helping to foster deepening connections between modern humans and the natural world.

#### **D2. Funding for Climate Resilience**

*Facilitator: Bob O'Connor, MA EEA  
Mitch Hartley, US Fish & Wildlife  
Shaun O'Rourke, RI Infrastructure Bank  
Kara Runsten, MA MVP (Municipal Vulnerability Preparedness Program)*

Communities, landowners and residents are looking for ways to reduce increasing impacts from climate change. Land conservation, stewardship and restoration activities can be an important way to reduce impacts like increasing heat islands and coastal and inland flooding. Land conservation and stewardship can also build resilience in forests and farms. This workshop will outline existing funding programs.

### **D3. You Too Can be a Naturalist**

*Jane Calvin, Lowell Parks & Conservation Trust  
Cory Elowe, University of Massachusetts  
Benedict Gagliardi, The Edna Lawrence Nature Lab at Rhode Island School of Design*

Thanks to some fantastic resources, becoming a naturalist is easier than ever! In this workshop we'll talk about some of the emerging tools that land trusts can use to engage the public in citizen science. We'll discuss iNaturalist to encourage nature observations and identification, eBird to draw in birders alongside The Murmuration project to crowdsource local birding knowledge for greater accessibility, and Epicollect5 to easily make your own custom data collection app.

### **D4. Federal Funding Opportunities for Land Protection and Stewardship using the USDA Natural Resources Conservation Service Programs**

*Joseph Bachand, USDA-NRCS  
Brunilda Velez, USDA-NRCS*

The USDA-Natural resources Conservation Service (NRCS) implements voluntary conservation programs to help protect, restore, and conserve lands. Some of these programs can be used by local land trusts, local and state governments, non-governmental organization, as well as private landowners, to place conservation easement on properties, to protect agricultural lands, wetlands, forestland and implement conservation practices. NRCS staff will review these programs to assist workshop participants in understanding the opportunities and benefits of accessing these federal funds.

### **D5. Attorneys Panel on Contemporary Issues & Solutions**

*Charles Allot, Aquidneck Land Trust  
Buzz Constable, Mass Land Trust Coalition  
Kathleen O'Donell, Attorney  
Stephen Small, Law Office of Stephen J. Small, Esq., P.C.*

Leading conservation attorneys (both on the panel and those who customarily attend and contribute) from RI and MA will converse about cases, issues and best legal practices involving land conservation and operations of land trusts and conservation professionals. Note that issues relating to the charitable conservation contributions are the focus of another session, we will focus on other conservation law issues in this panel. Questions and issues may be submitted in advance to Buzz@massland.org. Topics related to recent court cases in Massachusetts, real estate and conveyancing law, organizational operations, due diligence, contractual and statutory obligations and responsibilities, taxes, and acquisition techniques will be entertained. Consistent with past success, there will be ample opportunity for other issues that may be suggested by participants.



## **D6. Reflecting Commitment to DEI in Strategic Plans and Actions**

*Chris Canfield, Conservation Trust for North Carolina*

*Jenny Hansell, Berkshires Natural Resources Council*

*Nyssa Patten, Newton Conservators*

DEI Planning? Us too! Three conservation organizations working at different scales (statewide, regional and local), and in different stages of Diversity, Equity and Inclusion (DEI) planning and implementation, will explore challenges and successes related to setting internal and external commitments to equity and justice in their work. Topics will include acknowledging and addressing identity, power and communication dynamics; revising strategic priorities; defining concrete goals and meaningful metrics; and building new relationships, capacity and programs. This session recognizes the value of learning from both successes and failures, with honesty and humility. While each organization is unique, we believe there is value in coming together to learn from each other and discuss this topic openly. A concise list of resources and example plans will be shared.

## **D7. Addressing Environmental Justice through Tree Equity**

*Molly Henry, RI DEM Division of Forest Management*

*Cassie Tharinger, Providence Neighborhood Planting Program*

*Rachel Calabro, RI Dept. of Health*

This Fall, American Forests (AF) launched the first-ever Tree Equity Score (<https://treeequityscore.org/>); a standardized way to measure how well a neighborhood or municipality is delivering the many climate, health, and economic benefits that trees provide. In addition, AF launched a companion planning tool for Rhode Island, the Tree Equity Score Analyzer (TESA-<https://rhode-island.treeequityscore.org/>), an interactive planning tool that supports both policy and project-level interventions to achieve Tree Equity.

Presentations from Cassie Tharinger (Providence Neighborhood Planting Program), Rachel Calabro (RI Department of Health, RIDOH) and Molly Henry (American Forests), will provide an overview of new Tree Equity resources for Rhode Island and discuss how these tools along with other valuable datasets such as ambient air temperature are being integrated into RIDOH's health equity programs and the PVD Tree Plan, Providence, Rhode Island's forthcoming strategic urban forest master plan.