

The Greater Quabbin Conservation Investment Zone Assessment



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Executive Summary

The Greater Quabbin region of Massachusetts, a largely forested part of the Commonwealth that reaches from the Nashua River watershed in the east to the Connecticut River Valley in the west, has a remarkably rich endowment of natural resources. The region provides a critical supply of fresh water to metropolitan Boston, hosts abundant recreational opportunities, includes expansive wildlife habitat, offers fertile ground for sustainable farms and forestry operations, and gives access to a wide variety of affordable and livable places to learn and work. Furthermore, land conservation efforts in the area have been measurably successful in protecting these irreplaceable resources for the future.

Yet, the region in recent decades has experienced only modest growth in economic activity. While it is the home to myriad sites that are very attractive, there are few well-known attractions and events that draw a steady stream of visitors -- and tourism revenue -- to the area. Opportunities in the region to produce sustainable sources of food, fiber, and energy are still emerging.

The purpose of this report is to suggest that a coordinated and more integrated approach to conservation and economic development in the Greater Quabbin is not only feasible, but holds considerable promise. We recommend that a Greater Quabbin *Conservation Investment Zone* approach be advanced by the citizens, towns and civic institutions in the area, based on a set of complementary strategies for both conservation and development. These strategies will build upon one another to make the region an even more distinctively green and welcoming part of the Commonwealth, a place where present and future generations will increasingly want to invest time and energy.

The Conservation Investment Zone approach that we recommend is based on four pillars that are already being pursued to varying extents in the area. These strategies are:

- *Aggregation* for conservation
- *Mitigation* for conservation
- *Compact Development*, and
- *Rural Economic Development*.

Several examples offered here can illustrate how these aforementioned strategies have been employed in existing or ongoing initiatives, and can in the future be employed in emerging initiatives.

Aggregation for Conservation

The Greater Quabbin has already benefited from a series of aggregation projects, largely with leadership from the Mount Grace Land Conservation Trust in partnership with local, state and federal government agencies, as well as non-profit conservation organizations and academic institutions. For example, the state-funded Tully Initiative, completed in 2002, protected 9,100 acres in the vicinity of Tully Lake, an area providing spectacular views of the local landscape via the Tully Trail. More recently, Mount Grace received news that the federal Forest Legacy Program administered by the United States Forest Service will provide in Fiscal Year 2013 roughly \$5.1 million to acquire easements from 23 landowners on as much as 3,275 acres of land that will help connect conservation tracts stretching from the Quabbin Reservoir to Mount Wachusett. This is the fifth multi-landowner, or aggregation, project funded by the Forest Legacy Program. Prospectively, Mount Grace is awaiting word on its application for funding from the 2014 round of Forest Legacy awards, which will go further to assure that the Greater Quabbin area is perpetually endowed with a contiguous mosaic of protected lands. Also this year, in the Town of Leyden, the Working Farms and Forest Conservation Initiative will receive over \$1 million to protect an aggregation of 800 acres of picturesque landscape, under eleven separate ownerships. The Leyden Working Lands Initiative is a true partnership

between land trusts, landowners, town officials, and state agencies; indeed, in combination with other sources, funding from the state's new Landscape Partnership Program was a key catalyst for the successful orchestration of the Leyden project.

Building on the Greater Quabbin's solid foundation in landscape-scale conservation, a number of initiatives discussed in this report could further leverage private and public funding for land conservation. Strong partnerships with institutional landowners – civic, educational, and religious – can do a great deal for conservation. Many religious groups share the same environmental goals for protecting cherished natural landscapes, as was the case with the 2010 conservation project at St. Scholastica Priory & St. Mary's Monastery in Petersham. At the other end of the spectrum, a seemingly less likely partner in the Conservation Investment Zone might in fact be recreational motorists. By working with the Massachusetts Off-Highway Vehicle Advisory Committee, interested towns, and groups like the North Quabbin Trails Association, a possible acquisition of non-environmentally sensitive land can potentially: a) help to control illegal riding incidences on existing conservation land; b) expand future conservation alliances, c) favorably impact the regional economy, and d) retain additional land in forest cover with new funding sources.

Mitigation for Conservation

Massachusetts has been using mitigation funds from potential or actual environmental impacts to address environmental and conservation challenges for several decades. The Massachusetts Environmental Trust, founded by the Commonwealth in 1988, has used a combination of funding sources, including environmental damage assessment fees, license plates sales and appropriations by the state legislature to dispense “over \$17 million through nearly 650 grants to organizations which have in turn made a remarkable impact on protecting and enhancing the state's water resources.”^{vi} More recently, initiatives in Southeastern Massachusetts have focused mitigation funds from disparate development projects that disturb box turtle habitat to protect large parcels of suitable habitat for that species.

In the Greater Quabbin region, there is at present a substantial emerging opportunity for mitigation in connection with the relicensing of the Northfield stored-hydro project along the Miller's River. Past efforts to secure mitigation resources for a similar Federal Energy Regulatory Commission relicensing site along the Connecticut River, described in the body of this report, resulted in substantial and ongoing funding for restoration and conservation in New Hampshire and Vermont.

Another emerging development for forest mitigation is the expanding market for carbon credits. Maintaining intact forests supports sequestration of greenhouse gas emissions (carbon) from the atmosphere. The Regional Greenhouse Gas Initiative (RGGI) recently voted to adopt more inclusive standards that allow eligible forest conservation projects to qualify as carbon offsets, based on the California model. Now, carbon emitters can buy credits from landowners who protect their land or demonstrate better land management practices. For landowners in Massachusetts, the eligibility for selling carbon credits is still challenging to attain, and the potential income generated from carbon credits is still relatively small, due to the price of carbon. However, the new RGGI inclusion of forest retention (i.e. land conservation) as an allowable offset is a step in the right direction and a potential source of funding for conservation.

Compact Development

The idea of compact rural development (and the related concept of “conservation design”) was brought to the attention of a national audience by the work of the Center for Rural Massachusetts (CRM) at the University of Massachusetts at Amherst and other landscape design and planning centers in the 1980s and 1990s. Randall Arendt, a planner at CRM in that era, wrote a book focusing on the topic, *Rural by Design: Maintaining Small Town Character*, which has become a classic in the field.ⁱⁱ Since that time, several towns in the Greater Quabbin and Connecticut River Valley have implemented these and similar ideas in town design and approved development projects. In the past several years, several towns in the region, including

Shutesbury, Wendell, and New Salem, have adopted in town meeting a form of zoning that more affirmatively protects open space and streamlines compact residential design. Applications for developments using such zoning in the towns of Shutesbury and Wendell are currently in preparation. Synergistically, compact communities are also ideal for district-style biomass heating. Biomass (wood pellets, wood chips, or scrap wood) is a renewable energy source that can be harvested directly from the property. Using wood fuel helps the forestry industry and keeps dollars circulating locally. This report proposes the pursuit of incentives for developers who integrate biomass heating in their compact designs.

Rural Economic Development

There are several excellent examples of natural-resource based economic development emerging in the Greater Quabbin. At places such as the Red Apple Farm in Phillipston and the Johnson's Farm Restaurant & Sugarhouse in Orange, business entrepreneurs are highlighting the agricultural and forest-based heritage and potential future of the area. Tourists to the region are reportedly looking, in increasing numbers, for a unique "country" experience that is hands-on, educational, and connects them to the natural world. This form of "immersion tourism" is directly related to eco-tourism, outdoor recreation, culinary adventure, and other "outside the box" experiences that the Greater Quabbin has potential to offer.

The Garlic and Arts Festival held each October in Orange exemplifies the growing number of people -- young and old -- looking for a fun outdoor experience that celebrates the region's natural heritage. The event helps brand the region as a tourist destination and a hotspot for artisanal, natural resource-based innovation. Events like the Garlic and Arts Festival, in collaboration with online information sources such as the North Quabbin Woods website sponsored by the North Quabbin Community Coalition, as well as local tourism organizations, can in the future be even more effectively leveraged to stimulate sustainable economic growth in the area.

New Markets Tax Credits are also considered in this report as a way to finance natural resource-based enterprises. One idea, described in more detail in the report, would catalyze a rot-resistant lumber facility to treat Massachusetts grown wood.

An innovative idea to enhance the visibility and accessibility of sustainable enterprises and conservation assets in the Greater Quabbin region is the creation of a Quabbin Byway Trail -- a marked cycle and automobile pathway along existing roads and trails from, say, Wachusett Meadow Nature Sanctuary in Princeton, Massachusetts to Great Falls Discovery Center in Turners Falls. Done well, such a trail could highlight *known attractions, linked by a well-publicized trail* for visitors and local residents alike. Attractions might include inns, eating establishments, hiking trails, wildlife viewing areas, pick-your-own apple orchards, renewable energy facilities and museums that exist in the region. In doing so, the Quabbin Byway Trail, complete with such informational resources as: a concise brochure distributed by local gas stations, restaurants and stores; a dedicated website; and a smartphone app, could help to elevate the public image of the Greater Quabbin region.

While tourism holds promise for economic development, a number of other emerging strategies will help build the regional economic assets, particularly the forest economy. For example, community-scale biomass heating and solar photovoltaic installations have the potential to increase the value of woodlands, farmland and roadside corridors as demand grows for local, renewable energy sources. A grant model based on the Northern Forest Zone's work in biomass could leverage more private funding for energy efficient wood pellet boilers for homeowners. Furthermore, community biomass projects could partner town and institutional forest resources with municipal heating needs.

For high-quality wood markets, the new Commonwealth Quality Program has potential to transform consumer habits. In order for a Buy Local Wood movement to be as successful as the Buy Local Food movement, however, targeted educational outreach to architects, homeowners, and contractors is needed. A well-coordinated campaign for local wood, from artisanal

products to lumber, ought to build off the Commonwealth Quality Program and get support from groups like the Massachusetts Forest Alliance and the construction industry.

Looking Ahead

None of the ideas and initiatives highlighted in this report is without precedent. The strategies discussed in this report -- aggregation for conservation, mitigation for conservation, compact development and rural economic development -- have all been explored, with some notable successes, across Massachusetts and in the Greater Quabbin region. What we are recommending is a more integrated approach to conservation and development that has not yet been fully deployed in the region. We hope to see how each of these strategies can be linked together, so that they build upon one another. How, for example, can the presence of the Red Apple Farm enhance visitors' appreciation of the Quabbin-to-Wachusett open space corridor? How might a compact development in Shutesbury provide economic activity and add to the remarkable open space legacy of the town? And how can a thoughtful mitigation strategy at Turners Falls add to the viability of fish and floodplain forest habitat and the accessibility to the river for visiting hikers, kayakers and anglers there? Questions such as these present exciting challenges for the citizens and decision-makers who will shape the future of the Greater Quabbin region.

Acknowledgements

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The findings in this report are based in part on the foundation laid by those two earlier reports, the advice of committees, and field research. The report co-authors had help from a number of advisors and interviewees, including Sarah Wells (Mount Grace Land Conservation Trust), David McKeehan (Johnny Appleseed Country), Sean Mahoney (Mass DCR), Bruce Spencer and Pat Larson (North Quabbin Energy), Laura Marx (The Nature Conservancy), Gordon Boyce (Mass DCR), Congressman John Olver (retired United States Congressman from Massachusetts), and many more.

Table of Contents

Introduction	8
<i>What is a Conservation Investment Zone</i>	8
<i>The Greater Quabbin Region</i>	9
<i>The Four Assessment Categories</i>	11
Aggregation	13
<i>Implemented Projects in Aggregation</i>	14
<i>Quabbin to Wachusett Forest Legacy Project</i>	14
<i>Leyden Working Farms Lands Conservation Partnership</i>	15
<i>Emerging Innovations in Aggregation</i>	16
1. Institutional Landowner Partnership	16
2. Off Highway Vehicle Land Partnership	17
3. Due Diligence Fund	19
Mitigation	20
<i>Emerging Innovations in Mitigation</i>	21
4. Forest Carbon Credits	21
5. Federal Energy Regulatory Commission (FERC) Dam Relicensing: Mitigation Fund	22
Compact Development	24
<i>Implemented Projects in Compact Development</i>	25
<i>Natural Resource Protection Zoning (NRPZ) also known as Open Space Design</i>	25
<i>Emerging Innovations in Compact Development</i>	27
6. Continue Outreach to Towns about Zoning Options	27
7. Incentivize New Compact Developments with Biomass	27
Rural Economic Development	28
<i>Implemented Projects in Rural Economic Development</i>	29
<i>Commonwealth Quality Program</i>	30
<i>Red Apple Farm: Model for Conservation & Tourism</i>	30
<i>Forest to Fuel: Incentives for Household Biomass Heating</i>	31
<i>Neighborhood Forestry Project in Warwick, MA</i>	32
<i>Rural Tourism: Existing Capacity</i>	33
<i>Emerging Innovations in Rural Economic Development</i>	36
8. Creating Demand for Local Wood Products	36
9. New Possibilities in Rural Tourism	39
10. New Markets Tax Credits	42
Conclusion	45
Appendix	50

INTRODUCTION

The purpose of this report is to suggest that a coordinated and more integrated approach to conservation and economic development in the Greater Quabbin region is not only feasible, but holds considerable promise. We recommend that a Greater Quabbin **Conservation Investment Zone** approach be advanced by the citizens, towns and civic institutions in the area, based on a set of complementary strategies.

This report summarizes ideas— existing and emerging -- relating to land conservation, mitigation, compact development, and rural economic development. It identifies a number of ways to leverage private investment and influence public policy for natural resource-based economic development and conservation. Economic viability for forest landowners is an overarching goal. To achieve forest conservation goals, it is critical to maintain and enhance the economic potential and asset value of forest land.

Based on work done by the Massachusetts Governor's *Commission on Financing Forest Conservation*, and thanks to a generous grant by the Jessie B. Cox Charitable Trust Fund at the Boston Foundation, the Greater Quabbin Conservation Investment Zone Working Group has met to discuss bringing rural economic development and conservation to the forefront in this region.

What is a Conservation Investment Zone?

To clarify, *CIZA* refers to the assessment (this report), while *CIZ* refers to the actual zone. A Conservation Investment Zone can be loosely defined as a specific region or territory actively working toward the following:

- Sustainable conservation and development of cities and towns, neighborhoods, working landscapes, and wildlife habitat within the defined region or territory.
- Seeking to provide and attract the natural, social, and financial resources that allow sustainable physical and economic development.
- Is led by a working group, coalition, or appointed commission, of individuals associated with federal, state and local agencies, non-profits, private businesses, academic institutions, and others.

There are several examples of large-scale Conservation Investment Zones in the United States. These include the **Northern Forest Zone** (Northern New England), the **Dry Forest Investment Zone** (Oregon and Northern California), and the **Central Appalachian Forest Zone** (five states in the Appalachian Mountain region). Each has had unique successes over the past 5-10 years in promoting rural forest-based enterprise and landscape-scale land conservation.

Assessment Goals

1. **Catalog** ongoing efforts in the Greater Quabbin region relevant to landscape-scale aggregation, mitigation, compact residential development, and rural economic development.
2. **Identify** the most significant measures to implement in the next 3-5 years to increase the pace of forest conservation and promote innovative sustainable development initiatives.

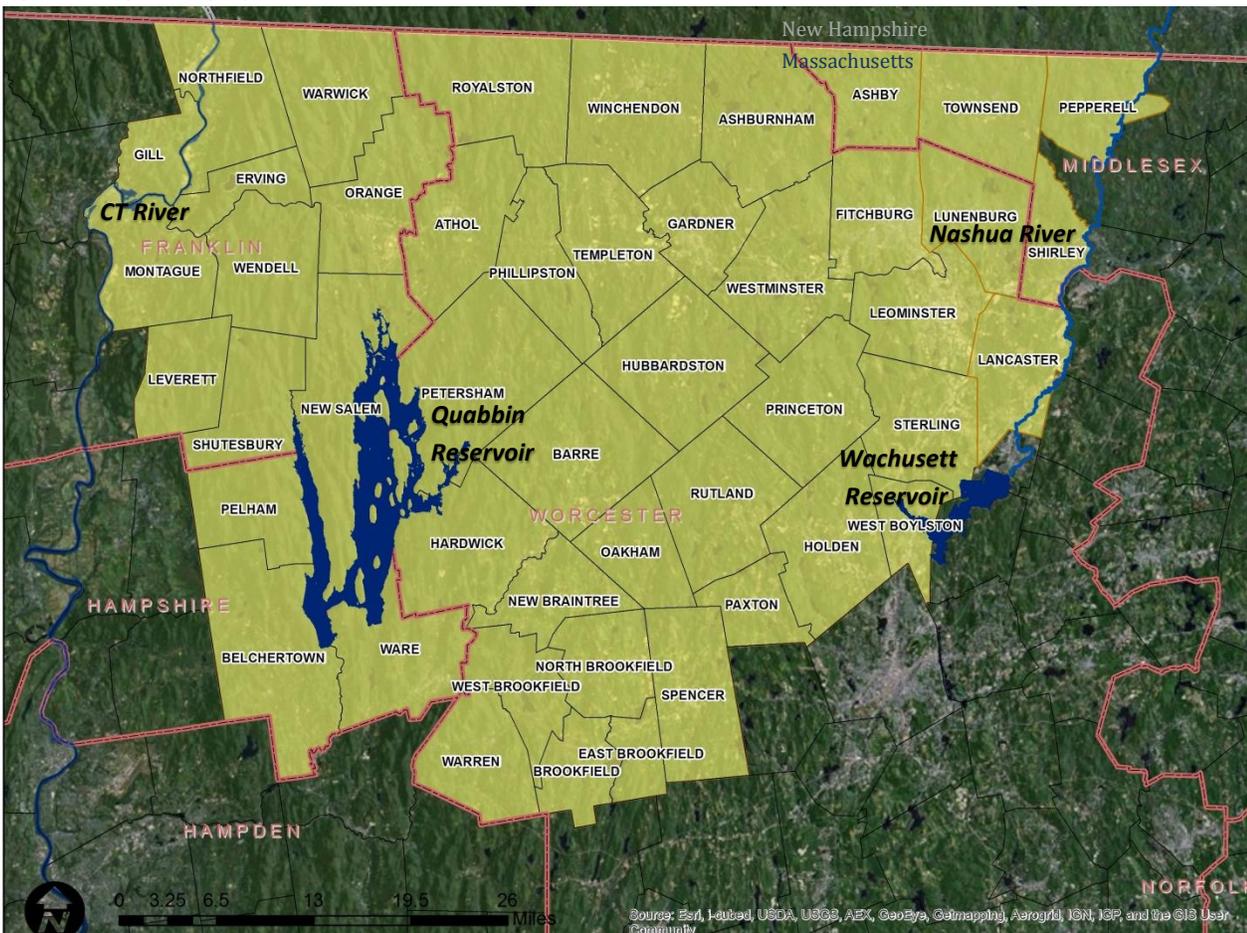
Example goals and elements of Conservation Investment Zones.

Northern Forest Zone (Northern New England and New York) ⁱⁱⁱ	Dry Forest Investment Zone (Oregon and Northern California) ^{iv}	Central Appalachian Forest Zone (KY, TN, OH, VA, WV) ^v
Innovation in the wood industry Carbon credits Community-scale biomass and education on renewable energy Building regional capacity, including tourism	Improve forest health Community-based natural resource management Biomass from small-diameter trees Creation of business related to land management/sustainability	Improve forest management Increase income for landowners and forest workers Locally produced wood products industry Revenue from carbon markets

The goals of the Greater Quabbin Conservation Investment Zone overlap with those of the three larger CIZs. One common denominator is that all deal with *natural resource-based economic development*. The Greater Quabbin is much smaller geographically and may not be able to leverage investment to the same extent, but, where the larger CIZs have greater prospects for involvement in carbon markets, for example, the Greater Quabbin has great potential for working with private landowners to aggregate parcels for conservation.

The Greater Quabbin Region

Figure 2. Map of the proposed Greater Quabbin Conservation Investment Zone.



The Greater Quabbin Conservation Investment Zone pilot area is located within the central part of Massachusetts, from the Connecticut River in the west to the Nashua River in the east, and from the New Hampshire border in the north, to Route 9 in the south. The communities in the Greater Quabbin region have historical, cultural, and economic similarities. There is significant political and organizational overlap within the region. For example, the Greater Quabbin CIZ region includes parts of Worcester, Franklin, Hampshire, and Middlesex counties. Regional planning entities that serve the region include Montachusett Regional Planning Commission, Franklin Regional Council of Governments and Central Massachusetts Regional Planning Commission.



Regional context of the CIZ.

This region is an exciting place to pilot a Conservation Investment Zone, for a few principal reasons:

- There is a high concentration of organizational resources and a strong track record to pursue the idea (e.g. regional land trusts, regional tourism councils, and sustainable energy advocates).
- Considerable activity in the fields of aggregation, mitigation, recreation, compact development and rural economic development has already been launched and is ongoing in the region. Focused conservation interest in the area is also established at the federal level, with the Forest Legacy program.
- Emergence of collaborations in sustainable development, tourism, conservation, and food systems.

Examples of Sustainable Development Collaborations in the Greater Quabbin

Franklin County Sustainability Plan

Quaboag Valley CDC Tourism Promotion

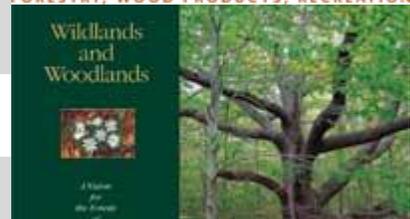
Rural 11 Prioritization Project – Central Massachusetts Planning Commission

North Quabbin Community Coalition, North Quabbin Woods – Economic Development Task Force

Tier I Economic Assessment

Wildlands & Woodlands: A Vision for the Forests of Massachusetts

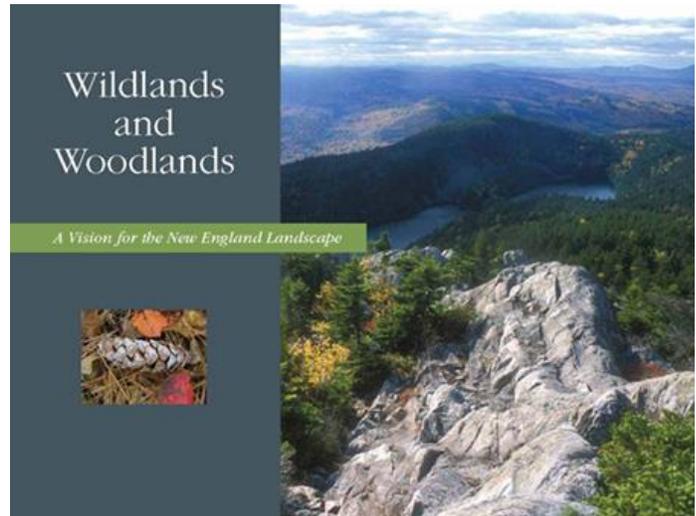
Forever Farmland Initiative of the Pioneer Valley



Background of the CIZ Idea and the Working Group

Between 2010 and 2012, the Governor’s Commission on Financing Forest Conservation (made up of private, public, and non-profit sector leaders) met to consider a wide range of options for financing of forest conservation in the state. In 2012, the Commission made a series of over 35 recommendations for bolstering initiatives in land aggregation, mitigation, compact development and rural economic development. These same four “pillars” are the basis for topics discussed in this report.

The Commission got its start from a roundtable meeting, held at Harvard Forest in Petersham MA, to discuss the Wildlands & Woodlands initiative. According to Jim Levitt, “the launch of the Wildlands and Woodlands visions for Massachusetts and New England has defined a new conservation paradigm for the region – one that brings together scholars, conservationists, and private sector interests to double the pace of forestland conservation in New England.” The Greater North Quabbin is one of the best places in the state to put the Wildlands and Woodlands vision to action.



The Wildlands & Woodlands Initiative, piloted by Harvard Forest, is an important foundation for the Conservation Investment Zone.

Since January 2013, the Greater Quabbin CIZA Working Group has been meeting monthly to brainstorm ideas and discuss the feasibility of the Conservation Investment Zone. Members of the Working Group include Leigh Youngblood (Mount Grace Land Conservation Trust), Jim Levitt (Harvard Forest Program on Conservation Innovation), Jay Rasku (North Quabbin Regional Landscape Partnership), Andrea Buglione (MassLIFT AmeriCorps), Al Rose (Owner, Red Apple Farm, Phillipston, MA), Peter Gerry (Owner, Pete’s Tire Barn, Orange, MA), Bob O’Connor (Massachusetts EOEEA Director of Land & Forest Conservation), Cinda Jones (President, W.D. Cowsls, Inc., Land Company, Amherst, MA), and Jeff Lacy (Massachusetts DCR, Division of Water Supply Protection)

The Four Assessment Categories

We have followed the four categories used in the *Report on Financing Forest Conservation*: **Aggregation, Mitigation, Compact Development, and Rural Economic Development**. Many of the *implemented projects and emerging innovations* contained in the report fall into more than one category. In fact, the most significant ideas are those that are not easily partitioned into one category, but rather, tie into multiple categories synergistically.

Aggregation. “Bundle together for conservation multiple parcels of land.”^{vi}

Protecting multiple parcels of land in one initiative has been conducted successfully in the Greater Quabbin. It uses funding and organizational resources most efficiently and shows the most promise for creating corridors of protected habitat and scenic landscapes.

Mitigation. “Avoid, minimize, and then mitigate procedures for development of forestland.”^{vii}

Compensatory measures to offset forest conversion with conservation progress. Examples include forest carbon credits and a conservation fund through dam relicensing negotiations.

Compact Development.

“Development mechanisms that conserve forestland.”^{viii}

This component promotes sustainable development through incentives and zoning codes aimed at reducing disproportionate land consumption.

Rural Economic Development.

“Enhance the economic viability of woodland communities through systematic programs.”^{ix}

Rural economic development grows on landscape-scale conservation, community-scale biomass, natural-resource based businesses, eco-tourism and regional branding.

Criteria for Selecting the *Best Emerging Ideas*

The most promising ideas for advancing public and private investment in conservation, mitigation, compact development and economic development were selected based on a number of criteria, including:

- Regionally appropriate
- Most synergistic – i.e. address multiple objectives
- Precedents exist (in Massachusetts or elsewhere)
- Requires both public and private participation
- Relates to economic potential and asset value of forest land
- Considered feasible

The most promising emerging ideas that meet these criteria, as indicated by the Working Group, include:

Aggregation

1. Institutional Landowner Partnership, p. 16
2. Off Highway Vehicle Land Partnership, p. 17
3. Due Diligence Fund, p. 19

Mitigation

4. Forest Carbon Credits, p. 22
5. FERC Dam Relicensing: Mitigation Fund, p. 23

Compact Development

6. Continue Outreach to Towns about Zoning Options, p. 28
7. Incentivize Compact Developments with Biomass, p. 28

Rural Economic Development

8. Increase Demand for Local Wood Products, p. 37
9. Rural Tourism: New Possibilities, p. 40
10. New Markets Tax Credits, p. 43

AGGREGATION

Aggregation is a conservation strategy that deals with the conservation of multiple land parcels simultaneously in order to increase landscape-scale conservation. Aggregation allows larger areas of land owned by multiple landowners to be voluntarily conserved while using organizational and financial resources in a focused manner. It requires working partnerships between private landowners, state and municipal organizations, and non-profit land trusts. While it is a relatively new concept in practice, the Greater Quabbin region has already had some of the most tangible successes with land aggregation in the country.

The Tully Initiative (Nov. 2000-Dec. 2002) was one of the first success stories of aggregation in the state. The initiative was spearheaded by the Commonwealth of



Mount Grace Land Conservation Trust

Massachusetts and Mount Grace Land Conservation Trust, when then Secretary of Environmental Affairs Bob Durand set out to protect the highly intact Tully watershed in the North Quabbin towns of Royalston, Athol, Orange, and Warwick. In the end, over 9,000 acres were protected through conservation easements on more than 100 properties.^x



Photo Credit: John Burk



Mount Grace Land Conservation Trust

“Massachusetts is an early and successful testing ground for aggregation initiatives that bundle together for protection, as working woodlands and relatively unmanaged wildlands, multiple parcels of land that may be owned or managed by individuals or organizations in the public, private and non-profit sectors. Such aggregation initiatives help to finance the acquisition, easement and stewardship of properties across sectoral, jurisdictional and even national boundaries. These properties, managed in coordination at a landscape scale, can play critical roles in achieving regional conservation objectives.”

Report of the Massachusetts Commission on Financing Forest Conservation

“Indeed, without action at a landscape scale, the conservation gains made over the past 150 years could be permanently lost to hardscape development that threatens regional water supplies, wildlife habitat and sustainable development prospects that shape the exceptional quality of life in the state’s 352 cities and towns.”

-Jim Levitt, Harvard Forest

For a complete list of land trusts and partner organizations working on aggregation projects in Massachusetts, visit www.massland.org