

PARTNERSHIP REPORT

1. PARTNERSHIP NAME

Quabbin to Cardigan Initiative – Massachusetts Region

2. LANDSCAPE

a. FOREST THREATS

Residential development, climate change and insect pests constitute the major threats to the Massachusetts forests in the Quabbin to Cardigan (Q2C) initiative. Our partnership has focused primarily on the threat from parcelization, fragmentation and development of our area’s forests. From www.q2cpartnership.org:

The predominately rural Q2C region is a last frontier in the suburbanization of central New England (see Forests on the Edge, USFS,2005). The Q2C’s private forests are undergoing widespread subdivision into smaller tracts; some areas are already experiencing significant development and unsustainable timber harvesting. If present trends continue with no parallel effort to conserve large forest ownerships while they are still relatively intact, the result will be the irreversible fragmentation of the region’s forests, and degradation of its exceptional habitat, watershed, recreational and economic values.

Fortunately, many landowners with important forest resources are willing to conserve instead of develop their land. The two main barriers to land conservation are 1) landowner awareness of conservation options, and 2) landowner incentives for conservation including payment for conservation easements. Land conservation organizations and agencies working in our region have hundreds of landowners willing to conserve their land if only additional funding or other incentives were available. Right now, the existing incentives can’t meet the demand, even though Massachusetts is one of the better states in terms of incentives available to landowners.

Conservation of the large blocks of forests in the Q2C region also helps address the most important environmental issue society faces today: we know that larger areas of protected land strengthen the landscape’s resiliency to climate change, and secures the forests that are so necessary for absorbing carbon.

For more on forest threats to our region see the MA Department of Conservation and Recreation’s Assessment of Forest Resources in Massachusetts: <http://www.mass.gov/eea/docs/dcr/stewardship/forestry/assessment-of-forest-resources.pdf> and Mass Audubon’s Losing Ground Report: www.massaudubon.org/our-conservation-work/community-outreach/sustainable-planning-development/losing-ground

b. CONSERVATION FOCUS AREAS

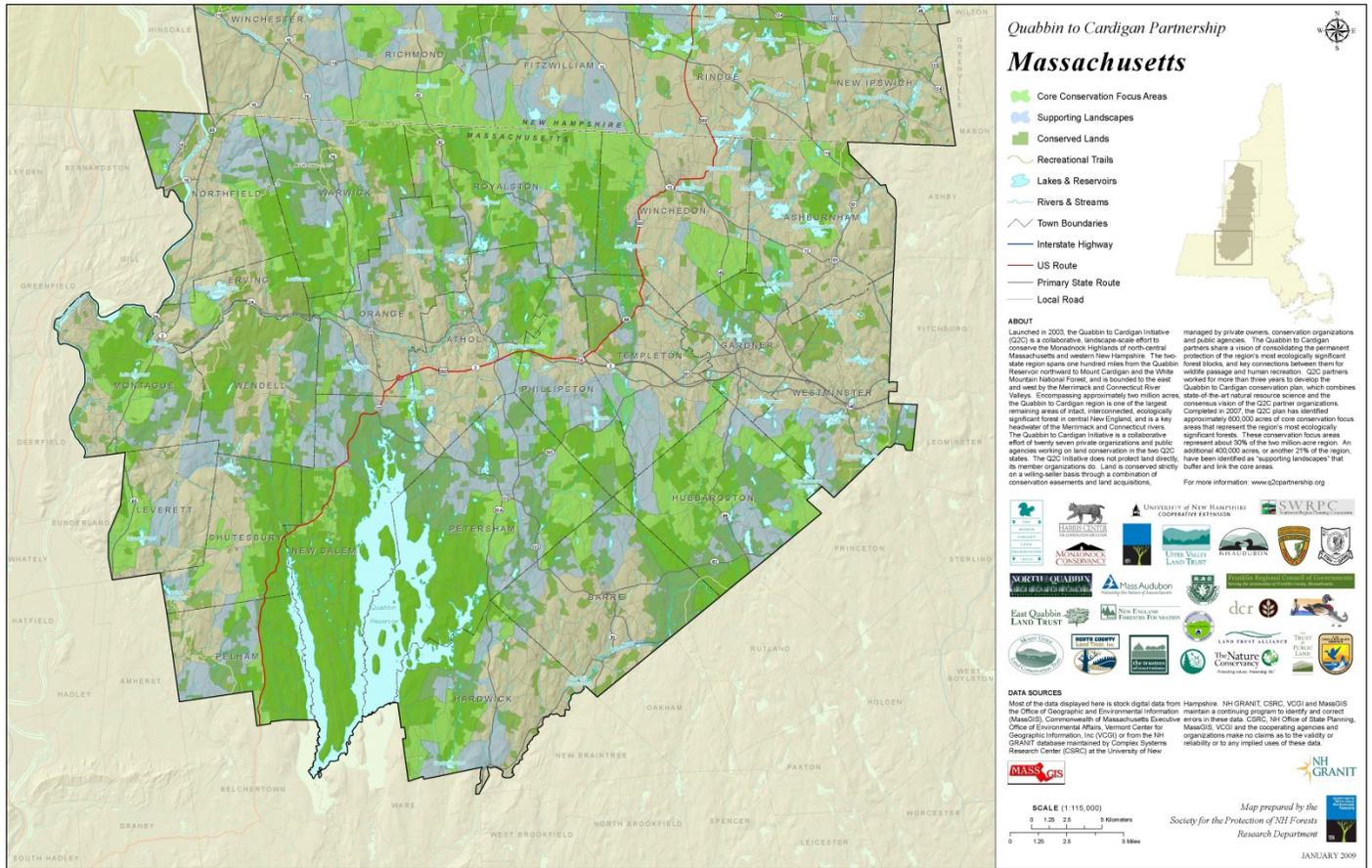
Our outreach and engagement efforts focused on landowners with parcels in the Q2C “core conservation focus areas” and Q2C “supporting natural landscapes”. Identified through an analysis by the Society for the Protection of New Hampshire Forests’ GIS department, these areas have high values for protecting endangered and threatened species, filtering public water supplies, timber production, and public recreation.

c. MAP OF LANDSCAPE

Please see map below

d. MAP OF FOCUS AREA

Please see map below:



3. PARTNERSHIP

a. MEMBERS AND KEY ROLES

i. COORDINATOR – NUMBERS OF MEETINGS

The North Quabbin Regional Landscape Partnership (NQRLP) coordinated the design, planning and implementation of grant. We held 8 partnership meetings and 10 smaller working group meetings focused on grant implementation. Jay Rasku served as the grant coordinator and point person with NQRLP, and worked closely with Andrea Buglione and Matthias Nevins, the Mount Grace Land Conservation Trust Regional Conservation Coordinators (an AmeriCorps-funded position) who provided critical capacity for grant activities.

ii. FOCUS AREA LEADERS

Other leaders in the initiative included:

- Helen Johnson, MA Department of Conservation and Recreation Service Forester. Helen created and helped implement some of the more innovative outreach events including the “Stew Club” and “Forestry Café”.
- UMass Amherst Keystone cooperators. The Keystone project educates forest owners and community leaders about forest ecology, sustainable forest management, wildlife habitat enhancement, and land protection, through a combination of lectures, field trips, discussions and take-home resources. Keystone cooperators who helped plan and implement grant activities included Bob Curley (Open Space Committee Conference), Ben & Susie Feldman (Stew Club), Phil Hubbard (Open Space Committee Conference), Jassy Bratko (Gardner Estate Planning Meeting), Jono Neiger (Land Tour), Joanne McGee (Open Space Committee Conference), Steve Funderbunk (Woods Forum), Bonnie House (Open Space Committee Conference), Tom Musco (Stew Club), and Heather Reed (Woods Forum).

- Municipal Board Members and Officials. Those board members and officials that helped plan and implement the grant activities who are not listed above as Keystone Cooperators, included: Dana MacDonald, Pelham Conservation Commission Chair (Woods Forum), Dave Small, Athol Open Space Committee Chair (Open Space Committee Conference), Chris Polatin, Gill Conservation Commission (Stew Club), Carrie Novak, Templeton Open Space Committee Chair (Gardner Estate Planning Meeting), John Henshaw, Templeton Open Space Committee (Gardner Estate Planning Meeting), ML Altobelli, Westminster Agriculture Commission Chair (Gardner Estate Planning Meeting), Janice Stone, Shutesbury Open Space Committee Chair (Woods Forum), Ted Cady, Warwick Planning Board (Open Space Committee Conference), Dan Leahy, formerly Wendell Open Space Committee (Woods Forum), David Koonce, Winchendon Conservation Agent (Gardner Estate Planning Meeting), Donna Francis, Montague Agricultural Commission Chair (Woods Forum), Rod Leehy, Hardwick Open Space Committee (Open Space Committee Conference), Mike Barry, Northfield Conservation Commission (Open Space Committee Conference), Jerry Wagener, Northfield Open Space Committee Chair (Open Space Committee Conference), Bob Clark, Chair Petersham Open Space Committee & Conservation Commission (Open Space Committee Conference), Joanne Sunshower, Shutesbury Planning Board (Open Space Committee Conference).
- Ben Wright, Kestrel Land Trust, planned and implemented the Pelham Neighborhood Meeting.
- Kari Blood, Kestrel Land Trust, helped plan and implement the Woods Forum.
- Kristin DeBoer & Kari Blodk, Kestrel Land Trust, helped implement the Leverett Estate Planning meetings.
- Rich Hubbard, Franklin Land Trust, helped implement the Leverett Estate Planning meetings.
- Janet Morrison, North County Land Trust, helped plan and implement the Gardner Estate Planning Meeting.
- Cynthia Henshaw, East Quabbin Land Trust, helped plan and implement the Hardwick Estate Planning Meeting and the West Hardwick Neighborhood Meeting.
- Gary Howland, Ashburnham Conservation Trust, helped implement the Gardner Estate Planning Meeting.
- Mary Alice Wilson, Rattlesnake Gutter Trust, helped implement the Woods Forum and the Leverett Estate Planning Meetings.

iii. **OTHER VENDORS AND ROLES**

iv. **OTHER PARTNERS**

The Massachusetts Department of Conservation and Recreation's Working Forest Initiative Program provided key funding and support for the Estate Planning Events.

4. FOCUS AREA –Massachusetts section of the Quabbin to Cardigan Initiative

Summary of Goals and Actuals:

Desired/ Actual Outcomes Summary								
	Estate Planning Workshops	Stew Club	Neighborhood meetings	Woods Forum	Land Tour	Forestry Café	Open Space Committee Conference	Totals
Event Number Goal	2	4	2	1	1	1	1	12
<u>Actual Event number</u>	5	4	2	1	1	1	1	<u>15</u>
Attendee Goal	60	60	20	30	20	40	50	280
<u>Actual Attendees</u>	245	47	29	98	19	25	55	<u>517</u> {324 unique landowners}
Landowner Action Goal	7	10	5	7	5	5		39
<u>Actual Landowner action</u>	32	19	16	Needs follow-up	4	Needs follow-up		<u>71</u>
Estate Attorney 1-1 mtg. Goal	12							12
<u>Actual Estate Attorney 1-1</u>	20							<u>20</u>
Town Project Goal							20	20
<u>Actual Town Projects</u>							9	<u>9</u>

- a. **STRATEGY # 1:** Forest Stewardship Program Landowner Network or “Stew Club” landowner engagement meetings – 4 meetings total.
- b. **LANDOWNER GROUP TARGETED:** Woodland Retreat landowners with Forest Stewardship Plans.
- c. **DESIRED OUTCOMES FROM STRATEGY:**
 - # of landowners (15) attend; and are educated about a) resources to implement their Forest Stewardship Plan goals and b) conservation options.
 - # of landowners (7) take concrete steps to implement their Forest Stewardship Plan (FSP) goals, which may include utilizing EQIP, WHIP and other wildlife habitat improvement programs.
 - # of Landowners (3) take concrete steps towards permanent conservation of their land.
 - Involve DCR Service Forester.
- d. **MESSAGES USED (AND HOW THIS TIES TO YOUR TARGET AUDIENCE):**
 - Used words and images recommended for Woodland Retreat owners (such as “caring for the land”), and avoided words and images that are recommended for Working the Land owners (such as “maximizing income from timber”).

NORTH QUABBIN STEW CLUB

Good food. Good people. Good ideas.



Sunday, March 2, 2014

At the home of Abbie Rorer & Charlie Buell
In Petersham, MA

Agenda

2:00 pm Meet & Greet
2:30 pm Walking Tour of the Property
5:00 pm Dinner and Discussion!

What to Expect

Join us for an on-site tour of Abbie and Charlie's land. Come see a woodlot marked for harvest, wildcrafted highbush blueberries, check out neighboring Harvard Forest Climate Change experiment, and see Abbie's rare plants greenhouse.

"Stew" represents three things: land *stewardship*, stew for nourishment, and stewing of ideas. We are a group of people who talk about the joys and challenges of caring for land, swap ideas and resources, and share great food.

Please RSVP or call for more info: Matthias Nevins,
978-248-2055 x27 and conservationist_ameriacorps@mountgrace.org

Please join us for the inaugural meeting of the
Greater Quabbin "Stew" Club
Good food. Good people. Good ideas.

*off Route 32 at the Athol/Petersham line (413)-358-8859

Saturday, April 6, 2013
Home of Ben & Susie Feldman
586 Briggs Rd.*
Athol, MA

Agenda
2:00 pm Meet & Greet
2:30 pm Walking Tour of the Property
5:00 pm Dinner and Discussion!

What is the Stew Club?
"Stew" represents three things: land *stewardship*, stew for nourishment, and stewing of ideas. Join us for a behind-the-scenes look at the trails and wildlife habitat our hosts are creating on their property, talk about the joys and challenges of caring for land, swap ideas and resources, and share great food.



Space is limited. Please RSVP or call for more info: Andrea Buglione,
978-248-2055 x21 or conservationist_ameriacorps@mountgrace.org

e. MATERIALS AND CHANNELS USED (DISCUSS WHICH CHANNELS AND MATERIALS WERE USED AND WHY, REFERRING TO THE TELE WORKSHOP)

We used a postcard delivered by mail to 325 landowners with Forest Stewardship Plans in the area. We also asked our local supporters from the Keystone training, members of local town municipal boards, and supportive landowners to invite people individually by phone or in person.

f. TIMELINE AND BUDGET

4 events total over the course of the grant, with a budget of \$125 for food and mailing. Only because of postage donated by MA DCR Service Forestry Program and food mostly donated by attendees did the budget work.

g. SUMMARY OF WHAT HAPPENED

Stew Club #1 – Ben and Susie Feldman's Place, 350 acres located on the Petersham/Athol/Phillipston line: April 6 2013, 15 landowners attended, toured the Feldman's land with special attention paid to the extensive network of trails and excellent forestry under the direction of forester Mike Mauri. Over dinner, the group brainstormed what the Stew Club should do next, and all agreed to keep meeting up at different owner's lands and homes to learn what colleagues were accomplishing, meeting up to 3 times a year. Ben and Susie Feldman were active hosts, and DCR Service Forester and NQRLP coordinators played supportive roles and helped facilitate the discussion

Stew Club #2 – Abbie Rorer and Charlie Buell's Place, 60 acres located in Petersham: March 2, 2014 with 17 landowners attending. All attendees were educated about management options for their land. These attendees also received a brief introduction to land conservation options. Department of Conservation and Recreation (DCR) service forester Helen Johnson facilitated the event but the landowners who hosted the event led the attendees on a walk through their property. After walking the land the group returned

inside to eat and share personal experiences in an informal and supportive setting. The event was concluded with a discussion on land management.

Stew Club #3 – Northfield Town Forest

April 27, 2014, with 13 landowners attending. This event was structured as a day-long intensive workshop for Stew club members on how to manage a woodlot for personal cordwood harvesting. The workshop was broken up into two parts, a classroom session and a hands-on component in the Town Forest. The event was led by three foresters: two state service foresters and one private consulting forester. The attendees enjoyed the detailed introduction to cordwood harvesting techniques and the hands-on field experience of choosing and marking trees for a firewood cut.

Stew Club #4 – Chris Polatin and Colleen Sculley’s Place, 89 acres in Gill, Massachusetts

May 3, 2014, with 8 landowner attendees. The event was hosted by two young landowners who have been actively managing their recently purchased 100 acre property. This final event in a four-part series brought together participants from the previous three events. The hosts of this event are currently working to place and Conservation Restriction on their property and were able to speak to the benefits of private land conservation. Four attendees at this final event also had conservation restrictions on their land. Although the turnout was lower than we had hoped the many of the attendees had attended previous events and were excited to be a part of a growing network of engaged landowners.

The major highlights outlined above show that this series of four events, focused on developing a network of engaged forest landowners who have a state issued forest stewardship plan (FSP), has been a success. These events were designed to be informal and informative. The target landowners have taken an initial step towards better stewardship of their land and these events help landowners develop a network of peers to assist them in making a sustained effort to steward their lands.

We now have a working list of active landowners who have taken the initial steps to implementing best management practices on their land. We will continue to develop these relationship and work to expand this peer-to-peer network in the future. The active involvement of the Massachusetts Department of Conservation and Recreation throughout this event series was extremely important to help build awareness around services this organization provides to landowners in our region.



Stew Club #2

h. CHALLENGES AND SOLUTIONS/ ADAPTATIONS

At two of the four events, landowners attended who had mobility issues, and were not able to join the rest of the attendees for a walk. For a future Stew Club event, a “stew club” landowner with an extensive woods roads

network and a number of “people carriers” (old army vehicles, etc.) has volunteered to host, which could be marketed to landowners with mobility constraints.

i. ACTUAL OUTCOMES:

i. BY THE NUMBERS (SEE FORM B) - WHAT WERE THEY AND WHAT DO THEY SAY

Strategy 1 Stew Club Events	Numbers of Landowners
Number of Events	4
Received Post Card	325 for each event (landowners received 4 invitations total, one for each stew club event)
Were called before Stew Club	10-50 before each event (not consistent)
Attended Stew Club	47
% Attendees in Target Attitudinal Group	60% (about 40% gave high marks for income generation as well)
Attendees who received a postcard	95%
Attendees who got a postcard plus phone call	10%
Attendees who are moving forward – ie meeting with a land trust, implementing their forest stewardship plan, applying for an NRCS grant, pursuing a CR, meeting with an estate planning attorney	19
# acres/in process for protection	95 acres (by August 2014), 350 acres (by July 2015 if grant is awarded)

ii. **MEDIA AND PRODUCTS (POST CARDS, FLYERS, LETTERS USED)** – about 325 postcards were sent out for each event.

iii. **EVENT PRESS COVERAGE** - Press coverage was not a goal

j. LESSONS

Landowners really enjoyed visiting each other’s land. A lot of learning occurred as people walked together over the land and shared experiences. Most of the landowners were already “on board” with forestry and land conservation. In fact, over half the attendees already had conservation restrictions on their properties. The timing of the four events could have been more structured- there was a big gap between the first and second event, and the second through fourth event all happened relatively close to each other. A better structure would be an event every 3-4 months.

k. BENEFITS

The events solidified landowners’ passion for their land and created stronger advocates for forestry and land conservation. From a land trust perspective, we have a better sense of who the advocates for forestry and conservation are in the region and can call on them when needed at public forums and discussions about forestry.

l. RECOMMENDATIONS

NQRLP will continue to organize followup with attendees to help them access new programs and opportunities for land conservation and land management. Mount Grace AmeriCorps members are likely to continue organizing Stew Club events into the future. Likely, the invitations will be expanded to include landowners who are not yet enrolled in the forest stewardship program – in this way, landowner’s already “on board” with forest stewardship can engage those that are not yet there and encourage enrollment and further land management on their land as well as land conservation. We could also use the private foresters in the area to help recruit more attendees to the program. We already have four landowners ready to host the next event, from Gardner, Wendell and Petersham, and we will likely approach DCR Service Forestry and the Working Forest Initiative to see if there is a small amount of funding available (\$100-\$200 per event) to support these meetings.



Stew Club #4

A) STRATEGY # 2: Landowner Neighborhood Gatherings

B) LANDOWNER GROUP TARGETED: Woodland Retreat

C) DESIRED OUTCOMES FROM STRATEGY:

- “Model” landowner hosts meeting, and helps recruit 10-15 landowners to attend a social gathering where landowner also shares information about why they conserved their land or why they are inclined to.
- Galvanizing conservation scenario presented, which may include a future Forest Legacy or Massachusetts Landscape Partnership Grant application, and the MA state income tax credit for land conservation.
- 2 separate events, total of 20 landowners, 5 take steps to conserve their land

D) MESSAGES USED (AND HOW THIS TIES TO YOUR TARGET AUDIENCE)

For the Hardwick Neighborhood Gathering, handwritten letters were sent by the host. For the Pelham Neighborhood Gathering, a more formal invitation was sent by the host, with hand addressed envelopes. The letters stressed words like “your family”, “legacy”, and others that reach Woodland Retreat-ers

You Are Invited!

Dear Neighbor,

You are invited to a friendly neighborhood gathering to talk about an opportunity to preserve the woods on and near your land. Dinner, refreshments, and a raffle will all be provided along with information about:

- A state grant opportunity for you and your neighbors to conserve 500+ acres in your community
- First-hand experience from a local landowner who has conserved her land
- Group question and answer session and informal discussion

Your land is part of your legacy. Deciding what will happen to your land after you are gone may be the most important step you can take as a landowner – not just for your own benefit, but for your family, your community, and of course, the land.

There is no obligation or cost to attend. We hope you will join us to learn about this important chance to join your neighbors in conserving your woods.

We hope to see you there!

Ben Wright, Land Conservation Specialist
& Peggy Hepler, Trustee of Kestrel Land Trust



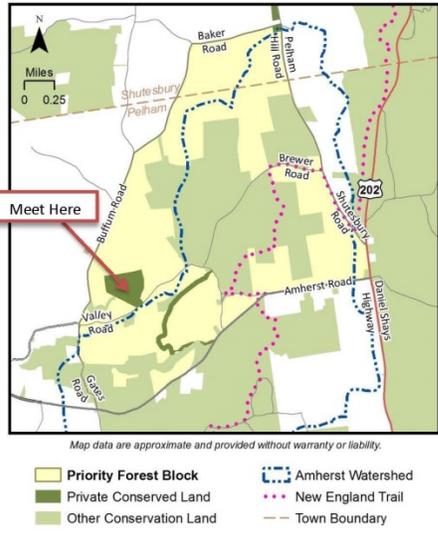
When: Monday, July 29,
6:30-8:00pm

Where: 6 Quarry St,
Pelham, MA

Who: Hosted by Kestrel
Land Trust and Pelham
landowner Peggy Hepler

RSVP Requested by Friday 7/26

Please contact **Ben Wright**,
Land Conservation Specialist
to RSVP or for more information:
413-549-1097 or ben@kestreltrust.org



E) MATERIALS AND CHANNELS USED (DISCUSS WHICH CHANNELS AND MATERIALS WERE USED AND WHY, REFERRING TO THE TELE WORKSHOP)

Hand addressed letters from a trusted neighbor.

F) TIMELINE AND BUDGET

Our goal was to hold two of these gatherings, each with a budget of \$100 for materials and food. That number could have been a bit higher to cover all the costs, something like \$200 is a safer bet.

G) SUMMARY OF WHAT HAPPENED

Neighborhood Gathering #1, Peggy Hepler’s place, Pelham MA:
 July 29, 2013 with 6 landowners attending as well as 6 unable to attend but interested in pursuing a land conservation project in the area. The event was organized by Kestrel Land trust. The target was 44 landowners in the Town of Pelham. As a result of mailings, phone and email conversations, and the event itself, all 6 landowner attendees indicated interest in pursuing a conservation project (acreage of those 6 landowners is 169 acres) and 6 landowners who did not attend also expressed interest.

Neighborhood Gathering #2, Kohn family place, West Hardwick MA:
 March 14, 2014, with 17 landowner attendees. The West Hardwick Neighborhood Gathering was organized in collaboration with two landowners who had previously approached East Quabbin Land Trust (EQLT) to discuss

their conservation options. The area of West Hardwick where the event was held had recently been identified as priority site for strategic biodiversity conservation efforts by NQRLP. EQLT worked with the model landowners on developing a post card that was mailed to 35 neighboring landowners. The event was designed to bring together local landowners for a dinner and discussion of conservation options with a particular focus on the Massachusetts Conservation Tax Credit program. Seventeen landowners attended the event. Cynthia Henshaw with EQLT facilitated a discussion on identifying local values, introduced the work of local land trusts, and explained in detail the use of conservation restrictions to meet landowner’s goals for conservation. A local resident who had recently conserved their property using the Massachusetts Conservation Tax Credit program told his story to the attendees and explained how the program allowed his family to conserve their property.

H) CHALLENGES AND SOLUTIONS/ ADAPTATIONS

I) ACTUAL OUTCOMES:

a. BY THE NUMBERS (SEE FORM B) - WHAT WERE THEY AND WHAT DO THEY SAY

Strategy 2 Neighborhood Gatherings	Numbers of Landowners
# of Events	2
Received Post Card	79
Were called before Gathering	79
Attended Gathering	29
% Attendees in Target Attitudinal Group	Approximately 75% (higher in Pelham)
Attendees who are moving forward – ie meeting with a land trust, implementing their forest stewardship plan, applying for an NRCS grant, meeting with an attorney, pursuing a CR	16
# acres/in process for protection	169

b. MEDIA AND PRODUCTS (POST CARDS, FLYERS, LETTERS USED)

A hand addressed letter was used to invite landowners. Follow phone calls were made as well

c. EVENT PRESS COVERAGE

No press coverage was attempted

J) LESSONS

These low-cost events generate a very high show-up rate for the number of landowners targeted – between 20 and 50% in our experience. Having a well-respected and well-liked host who is pursuing land conservation is the most difficult aspect of these events, as well as having a concrete program or initiative the landowners who attend can join – in these cases it was joining up with a Landscape Partnership Grant effort or a Conservation Land Tax Credit program.

K) BENEFITS

These meetings are a great way for land conservation specialists to meet other landowners in an important focus area.

L) RECOMMENDATIONS

Conduct more of these outreach events in our region.

A) STRATEGY # 3: Enhancing recreational values on your land tour, or “Land Tour”

B) LANDOWNER GROUP TARGETED: Woodland Retreat

C) DESIRED OUTCOMES FROM STRATEGY

- # of landowners (20) educated about recreational land management options for their land.
- # of landowners (5) take concrete steps towards managing their land.
- “Model” landowner hosts event, and helps recruit 20-40 landowners to attend tour where landowners visit 1-3 properties demonstrating trail design and building/ or pond design and building.
- Forest Stewardship program and NRCS programs promoted.

D) MESSAGES USED (AND HOW THIS TIES TO YOUR TARGET AUDIENCE)

After months of attempting to organize a “pond building” tour with no success, we changed course and decided to try a “permaculture” workshop. It appeared to us that many woodland retreat landowners might approach land management under this relatively new term.

E) MATERIALS AND CHANNELS USED (DISCUSS WHICH CHANNELS AND MATERIALS WERE USED AND WHY, REFERRING TO THE TELE WORKSHOP)

We used a postcard advertising method, sending it out to any landowner with 10 acres or more in an 8-town region.

F) TIMELINE AND BUDGET

Our budget was \$800, which was about right for the event.

G) SUMMARY OF WHAT HAPPENED

We used this event to see if Permaculture is a good way to engage people in small-scale activities to create wildlife habitat or grow perennial food sources. The event had a good show-up rate considering it was pouring rain. The landowners who attended did not have significant acreage. Two local landowners led nineteen (19) participants on guided tour of their property. The site was a small scale homestead and farm operation in which permaculture techniques were utilized. This site introduced landowners to way they could manage a small property in a way that protects significant natural features while increasing the sites ability to produce food and fuel wood among other things. The second site was a larger scale operation where the landowner has been running a small scale sheep operations and has been doing active forest management. The landowner worked to place an APR on the land, entered the Forest Stewardship Program (FSP), has worked with NRCS to develop silvo-pasturing sites along their forest/field edge, and has large mushroom yards. Together these two landowners introduced landowners to sustainable land management at varying scales. This event was targeted towards landowners who own 10 acres or more and are eager to take that next step towards sustainable land management.

H) CHALLENGES AND SOLUTIONS/ ADAPTATIONS

I) ACTUAL OUTCOMES:

a. BY THE NUMBERS (SEE FORM B) - WHAT WERE THEY AND WHAT DO THEY SAY

Strategy 3 Land Tour	Numbers of Landowners
Number of events	1
Received Post Card	985
Were called before Tour	0
Attended Tour	19
% Attendees in Target Attitudinal Group	100%
Attendees who received a postcard	100%
Attendees who are moving forward – ie meeting with a land trust, implementing permaculture on their land, applying for an NRCS grant, meeting with an attorney, pursuing a CR,	4
# acres/in process for protection	0

b. MEDIA AND PRODUCTS (POST CARDS, FLYERS, LETTERS USED)

We used a postcard to advertise the event



Forest and Farm Tour



A Guided Walking Tour of Two Amazing Properties in Leverett and Montague

See how local landowners have worked on their properties to enhance wildlife habitat AND increase productive yields of food, fuel and fiber.

THE TOUR:

- **HICKORY GARDENS:** Jono Neiger and his family moved onto their 3-acre property in Leverett in 2004. Since that time they have been busy planting gardens, orchards, kiwi vineyards, a forest garden and renovating their home to be more energy efficient and ecological. Jono is a founding partner of the Regenerative Design Group, a faculty member at the Conway School of Landscape Design and has a diverse background in ecology, conservation, restoration, land stewardship, permaculture, horticulture, and landscape design.
- **BROOK'S BEND FARM:** Suzanne Webber and Al Miller bought this 90-acre farm in Montague in 2003 and have gradually diversified what it offers. They manage 65 acres of forestland and have recently worked to improve wildlife habitat along the edges of their fields using forestry and silvo-pasturing. The farm is home to many diversified enterprises and is a demonstration site for forest management and permaculture techniques.

EVENT DETAILS: Saturday April, 26 from 10 A.M. —2 P.M. **FREE!!** RAIN OR SHINE

10 A.M. Meet at *Hickory Gardens*: 163 Rattlesnake Gutter Road, Leverett

12 P.M. Lunch Provided!

12:30P.M. Carpool to *Brook's Bend Farm*: 119 Sunderland Road, Montague

2 P.M. Wrap Up

Please RSVP, Space is Limited

Contact: **Matthias Nevins** with the
North Quabbin Regional Landscape Partnership:
978-248-2055 ex 27
conservationist_ameriacorps@mountgrace.org

c. EVENT PRESS COVERAGE

We did not seek press coverage.

J) LESSONS

Permaculture appears to be a good topic and activity to engage with younger landowners. The word “permaculture” is probably too “out there” for the average 50-60 year old woodland retreat landowner. By using different language, however, those older woodland retreaters (who have land with more acres than the landowners that attended our workshop) might attend and learn some great and easy activities they can take with their families to create wildlife habitat, create perennial gardens to supply food, etc.

K) BENEFITS

There is a bridge to be made between simple permaculture activities and woodland retreaters, and we got close to building it in this workshop.

L) RECOMMENDATIONS

Next time we would probably advertise the workshop without mentioning permaculture.

A) STRATEGY # 4: Planning the Future of our Land Estate Planning Workshops

B) LANDOWNER GROUP TARGETED: Woodland Retreat

C) DESIRED OUTCOMES FROM STRATEGY

- 2 events that prioritize landowners from Q2C Focus Areas and Supporting Natural Landscapes
- # of landowners (30) educated about land management, land conservation, and other estate planning options
- # of landowners (7) take concrete steps towards estate planning including contacting a forester or land trust or estate planning attorney, enrolling in chapter 61, etc.
- Work with “Model” landowners and KEYSTONE trainees to recruit 30-50 landowners
- Follow up one-on-one meetings with estate planning attorney (6-8 meetings out of each event = 12-16 individual landowner meetings with estate planning attorney total)

D) MESSAGES USED (AND HOW THIS TIES TO YOUR TARGET AUDIENCE)

We used language designed to reach Woodland Retreat landowners, with words such as “legacy” and avoiding phrases like “timber harvesting income”.

E) MATERIALS AND CHANNELS USED (DISCUSS WHICH CHANNELS AND MATERIALS WERE USED AND WHY, REFERRING TO THE TELE WORKSHOP)



F) TIMELINE AND BUDGET

The grant provided \$1600 for individual landowners to meet with estate planning professionals one on one. The Massachusetts Department of Conservation and Recreation Working Forest Initiative Grant provided the funds for the organizing of the estate planning outreach event where landowners could sign up for these one-on-one followup meetings.

G) SUMMARY OF WHAT HAPPENED

The estate planning workshops accomplished their goals, with high turnout primarily because of strong community leadership conducting outreach to individual landowners. Those personal invitations brought in a fair number of Working the Land folks.

H) CHALLENGES AND SOLUTIONS/ ADAPTATIONS

The challenge has always been to provide landowners just enough information to keep them moving forward but not too much to overwhelm them. Thanks to Paul Catanzaro and Wendy Sweetser Ferris, we have a very good outline for Estate Planning Attorneys to use which helps with this issue.

I) ACTUAL OUTCOMES:

i. BY THE NUMBERS (SEE FORM B) - WHAT WERE THEY AND WHAT DO THEY SAY

Strategy 4- Estate Planning Events	Numbers of Landowners
# of Events	5
Received Post Card	2,931
Were called before Event	200
Attended Events	245
% Attendees in Target Attitudinal Group	70%
Attendees who received a postcard	95%
Attendees who are moving forward – ie meeting with a land trust, applying for an NRCS grant, meeting with an attorney, pursuing a CR,	52
Attendees who met with an attorney (subset of above number)	20
# acres/in process for protection	765

ii. MEDIA AND PRODUCTS (POST CARDS, FLYERS, LETTERS USED)

A postcard was sent to landowners.

iii. EVENT PRESS COVERAGE

Press coverage was not a goal

J) LESSONS

When holding an event like this, it's essential to have a template for Attorneys to follow and to keep them to 30 minutes of talking, more for questions. Creating property maps for attendees that show important natural resources is time intensive, but attendees really appreciate it and it helps the initial conversations at the event with land conservation specialists move ahead much quicker. Another tip is to advertise that the event will run for 2 hours but end 30 minutes early for dessert, and people will stay around and have those essential conversations with their peers and with the professionals in the room. It also didn't hurt to say that everyone who attended received a free dinner. Signing up people at the event to meet with an estate planning attorney worked well – it keeps the momentum up and moves people one more step towards conservation. A peer landowner who has been through the process and can share their story is essential. Having local leaders recruit attendees makes all the difference.

K) BENEFITS

A number of land conservation projects have come out of these events

L) RECOMMENDATIONS

Set up more 1 on 1 meetings with landowners following the event, including with land trusts. It is not widely known among landowners that a land trust will meet for free. Setting up a day of meetings between landowners and a land trust after an introductory forum would be beneficial.



Gardner Estate Planning Meeting (Left), Leverett Estate Planning Meeting (Right)

A) STRATEGY # 5: Woods Forum

B) LANDOWNER GROUP TARGETED: Woodland Retreat

C) DESIRED OUTCOMES FROM STRATEGY

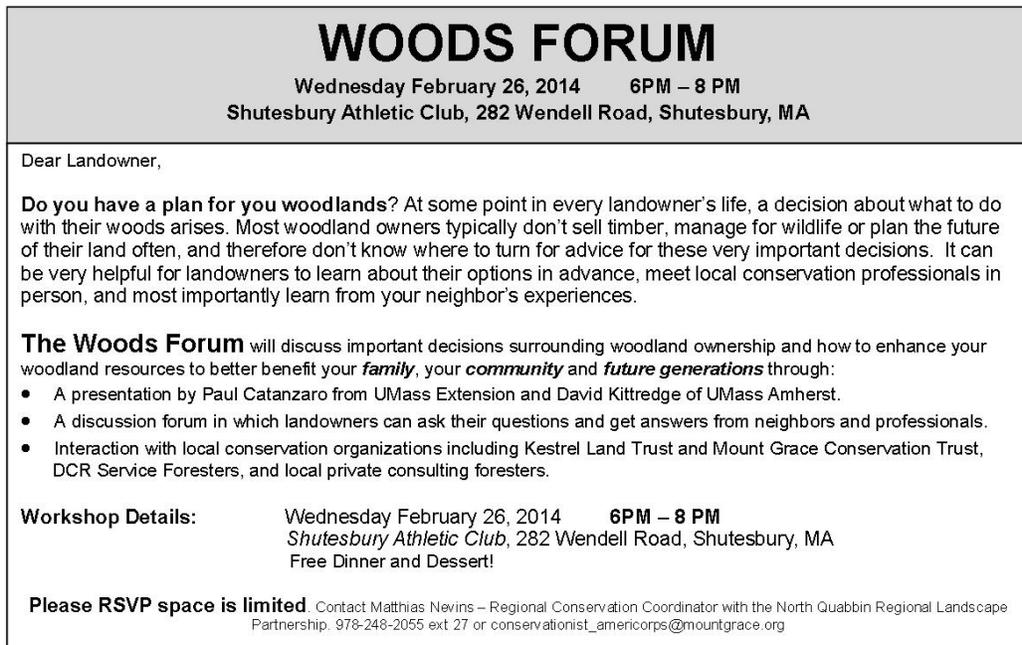
- # of landowners (30) educated about land management and land conservation options.
- # of landowners (7) take concrete steps towards land management and land conservation.
- Work with "Model" landowners, and KEYSTONE trainees to recruit 30-60 landowners.
- Peer landowners sign invitations, make followup one-on-one invites.
- Ideally, timed in response to a current issue (storm damage, invasive species, tax time (chapter 61), FSP funding announcement, etc).
- 1 event

D) MESSAGES USED (AND HOW THIS TIES TO YOUR TARGET AUDIENCE)

See previous comments.

E) MATERIALS AND CHANNELS USED (DISCUSS WHICH CHANNELS AND MATERIALS WERE USED AND WHY, REFERRING TO THE TELE WORKSHOP)

We sent postcards to everyone with 10 acres or more in eight towns, and local leaders called individuals



F) TIMELINE AND BUDGET

Our budget of \$700 would have been enough if we had capped attendance, but we decided to use other funds from other events and let as many people attend as the space would hold. We went over budget estimates for this event by \$500, because of the increased cost for food.

G) SUMMARY OF WHAT HAPPENED

The Woods Forum was held February 26, 2014 in Shutesbury, MA. The event was targeted to landowners in surrounding towns with 10 acres or more. The event was co-sponsored by Kestrel Land Trust. Woods forums are designed to bring forest landowners together for a discussion on woods-related topics that the audience wants to get into. At this event, two UMass Amherst Extension Professors facilitated, letting the attendees dictate the content of the discussion. We had other professionals on hand as well in order to answer questions that fellow landowners could not, including several private consulting foresters, state service foresters, a NRCS representative, and several land protection specialists.

The event was a success with over 100 attendees (98 landowners).

H) CHALLENGES AND SOLUTIONS/ ADAPTATIONS

I) ACTUAL OUTCOMES:

i. BY THE NUMBERS (SEE FORM B) - WHAT WERE THEY AND WHAT DO THEY SAY

Strategy 5 Woods Forum	Numbers of Landowners
Number of Events	1
Received Post Card	647
Were called before Woods Forum	55
Attended Woods Forum	98
% Attendees in Target Attitudinal Group	70%
Attendees who received a postcard	80
Attendees who are moving forward – ie meeting with a land trust, applying for an NRCS grant, meeting with an attorney, pursuing a CR,	Followup needs to occur

ii. MEDIA AND PRODUCTS (POST CARDS, FLYERS, LETTERS USED)

Postcard mailed out, and about 40 posters were hung at key places in the 8 towns.

iii. EVENT PRESS COVERAGE

Press coverage was not pursued.

J) LESSONS

A strong facilitator is essential for a woods forum to work well. Having a number of local leaders involved from the very beginning in planning the event and outreach for the event paid off with a large attendance for the event.

K) BENEFITS**L) RECOMMENDATIONS**

100 people is probably the maximum number you would want for an event like this. It was probably too large for some people to feel comfortable sharing ideas.



Woods Forum

A) STRATEGY # 6: Open Space Committee Conference**B) LANDOWNER GROUP TARGETED: N/a****C) DESIRED OUTCOMES FROM STRATEGY**

- Geographic locations: 1 event that prioritizes volunteer municipal board members from Q2C Area, and other priority areas of the Keeping Forests as Forests grant (Mass Conn, Deerfield Watershed, Taconics)
- Volunteer Town Board members (50) learn about land management and land conservation options.
- Volunteer Town Board members (10) take steps to help landowners conserve or manage their land.
- Volunteer Town Board members (10) take steps to help their municipality conserve or manage their lands, with an outreach component for project to serve as a model for landowners in the community.
- Work with open space committee members, conservation commissioners, and KEYSTONE trainees to develop a peer-to-peer conference addressing forest management and forest conservation issues, open to members from other Keeping Forests as Forests priority areas, and to a lesser degree members from across the state.
- Conference goals would include: 1) encouraging towns to establish a town forest, 2) encouraging towns to actively manage existing town woodlands 3) encourage and train town board members and citizens to pursue land conservation projects 4) train town board members and citizens in landowner outreach tactics 5) present information about SFFI messaging work.
- Identify "peer" presenters to share experiences with attendees in a variety of workshops with the above goals in mind, with possibilities including 1) how to organize a landowner outreach event, 2) effective

messaging, 3) forestry tools and options, 4) land conservation tools and options, 5)Town Forest stewardship (with site visit), and 6) woodland stewardship and conservation funding tools.

D) MESSAGES USED (AND HOW THIS TIES TO YOUR TARGET AUDIENCE)

E) MATERIALS AND CHANNELS USED (DISCUSS WHICH CHANNELS AND MATERIALS WERE USED AND WHY, REFERRING TO THE TELE WORKSHOP)

2 mailings went out to all Massachusetts cities and towns. Some recruitment calling also occurred.

Free Event, Free Lunch! *An event for municipal and land trust volunteers interested in open space protection!*

Sponsored by:

The North Quabbin Regional
Landscape Partnership | Mount
Grace Land Conservation Trust |
Sudbury Valley Trustees |
Nashua River Watershed
Association | UMass Amherst |
MassLIFT AmeriCorps

**2013 Massachusetts
OPEN SPACE
CONFERENCE**

Saturday, June 8, 2013 | 10 am-3 pm*
Oakmont Regional High School
Ashburnham, MA
***Sign-In Starts at 9:30 am**

To Register: email Andrea at conservationist_ameriCorps@mountgrace.org
or call (978) 248-2055 x21, by May 31st.

Indicate your *three* workshop choices.

Session I 11:00 – 11:45

A. Conservation 101. What are the options for permanently protecting open space? What is a conservation restriction and how does it work? How do public and private partnerships work to get land conservation done? Get these and any other questions answered at Conservation 101.

B. Managing Town Land. This session will focus on many aspects of managing municipal land, from invasive species management to starting + maintaining a town forest! Hear from local volunteers who utilized grants to get their Town Forest started.

C. Funding & Grants: New Opportunities. Learn which state grants you should be applying for and how they can provide support for open space conservation projects. LAND grant, Conservation Partnership, the Mass Tax Credit, and other grant opportunities will all be covered!

Session II 11:55 – 12:40

A. "CR" Monitoring 101. Learn how conservation commissions and volunteer land trusts carry out monitoring for conservation restrictions, utilize technology, and train other volunteers. We'll touch on the legal requirements for monitoring, talk about best practices, and discuss a few case studies.

B. Starting a Trails Committee and Managing Trail Projects. Hear about the formation of town Trails subcommittees and the work they're doing to partner with public and private groups to form dynamic trail networks, and how to start one in your community.

C. Landowner Outreach and Event Planning. What are the best methods for engaging landowners about land conservation and land stewardship options? How do you get people into a room? How do you balance technology/social media with more traditional methods of outreach?

Session III 1:40 – 2:20

A. (Re) Writing your Town's Open Space & Recreation Plan. Every town needs an Open Space Plan, but how can you write a solid plan with only limited time and resources? Learn the tools and tricks you need to succeed.

B. Community Preservation Act. This session will provide insight into the newest legal changes to the Community Preservation Act as well as discuss strategies for building community support for passing CPA in your town.

C. Volunteer Recruitment. Are you ready to take action on your Open Space Plan? From managing town land to to doing trail work to organizing great events, you need volunteers to make it happen. Learn how to get your crew together to get stuff done!

F) TIMELINE AND BUDGET

Our budget of \$2500 was about right for the event. We came in under that amount.

G) SUMMARY OF WHAT HAPPENED

Attendees gave the event high ratings. Open Space Committees are an underserved group, and yet have real influence at the local level regarding forestry and land conservation. The event workshops were run primarily by volunteer open space committee members themselves, and that peer to peer learning method was appreciated by the attendees.

H) CHALLENGES AND SOLUTIONS/ ADAPTATIONS

Not losing the momentum from the conference

I) ACTUAL OUTCOMES:

iv. BY THE NUMBERS (SEE FORM B) - WHAT WERE THEY AND WHAT DO THEY SAY

Strategy 6 Open Space Committee Conference	Numbers of attendees
Number of Events	1
Received Post Card	351 cities and towns
Were called before event	35
Attended event	55
Attendees who received a postcard	55
Attendees who are moving forward – ie working to implement open space plan, organizing landowner outreach events, enrolling town land in forest stewardship program, etc.	9
# acres/in process for protection	225 acres

v. MEDIA AND PRODUCTS (POST CARDS, FLYERS, LETTERS USED

vi. EVENT PRESS COVERAGE

Press coverage was not a goal

J) LESSONS

Developing skills and resources of local Open Space Committee leaders has huge payoffs for land conservation organizations. These folks are key resources for reaching out to important landowners, winning political support for conservation and forestry at the local level, etc. Followup takes a lot of time and we need to do more of it.

K) BENEFITS

L) RECOMMENDATIONS

The Commonwealth would be wise to set aside a few thousand dollars a year to continue developing these important land conservation advocates.



Open Space Committee Conference

A) STRATEGY # 7: Forestry Cafe

B) LANDOWNER GROUP TARGETED: Woodland Retreat

C) DESIRED OUTCOMES FROM STRATEGY

- Based on the Science Café model, which uses a game show model to educate people, a fun family event to educate folks about the landscape, what foresters do, forest ecology, wildlife, forestry, land conservation.

- Audience: kids and their parents, goal of 20 teams of 2. Look at 4-H quiz bowl & forestry invitational for other ideas. Team up with a grade or a classroom.
- Desired Outcomes:
- # of landowners (20) and their children (20) educated about land management (forestry) and land conservation information.
- # of landowners (5) take concrete steps towards land management and land conservation.

D) MESSAGES USED (AND HOW THIS TIES TO YOUR TARGET AUDIENCE)

We used woodland retreat language in posters in towns near the event, and launched a social media campaign to spread the word.

E) MATERIALS AND CHANNELS USED (DISCUSS WHICH CHANNELS AND MATERIALS WERE USED AND WHY, REFERRING TO THE TELE WORKSHOP)

F) TIMELINE AND BUDGET

The budget of \$272 was adequate, but did not allow for a mailing.

D) SUMMARY OF WHAT HAPPENED

In the end, after three AmeriCorps members spent a solid few weeks spreading the word, 13 teenagers and 12 landowners attended, mostly because of connections made with high school envirothon club members. The agenda involved spending 1 hour with a forester discussing harvesting, 1 hour with a woodworker talking about using local wood, and 1 hour with a builder who built his house from wood off his land. The event ended with a trivia game based on information shared during the event, with prizes awarded for those who knew the most answers about local wood.

E) CHALLENGES AND SOLUTIONS/ ADAPTATIONS

Perhaps the idea of teenagers and their parents attending a workshop about local wood was far-fetched.

F) ACTUAL OUTCOMES:

a. BY THE NUMBERS (SEE FORM B) - WHAT WERE THEY AND WHAT DO THEY SAY

Strategy 6 Forestry Cafe	Numbers of attendees
Number of Events	1
Attended event	25
Attendees who are moving forward – ie working to implement open space plan, organizing landowner outreach events, enrolling town land in forest stewardship program, etc.	Followup is needed
# acres/in process for protection	0

b. MEDIA AND PRODUCTS (POST CARDS, FLYERS, LETTERS USED)

We used posters, phone calls to teachers, advertisement in the paper, and social media to spread the word

c. EVENT PRESS COVERAGE

G) LESSONS

Having a team of teenagers, parents and teachers help design the event from the start would have helped with turnout.

H) BENEFITS

We tried something totally new, and learned a lot for our next family-focused activity

I) RECOMMENDATIONS

Having a local team to help plan and recruit others would be helpful.



Overall impressions from the grant:

- Those involved in the Massachusetts Q2C area have many landowners to follow up with as a result of the activities. This grant provided important capacity for the landowner outreach that is so necessary to build awareness about conservation options among landowners and to build relationships between landowners and their peers and those professionals that can help them achieve their land conservation and land management goals.
- The activities and process reinforced the need to have local champions helping to organize and recruit events. Those local spokespeople can be more important than a perfectly crafted message in bringing people to an event so that you have a chance to engage them in land protection.
- Moving ahead, we want to think more strategically about the order of events, and creating a series of events that brings people along a typical pathway to conservation: for example, an estate planning workshop followed by a one-on-one meeting with a land trust followed by a one-on-one meeting with an estate planning attorney followed by a more advanced estate planning workshop.
- We have so much demand for conservation, there's need for even more funding and tax incentives from our government partners

Thank you for the opportunity to participate in this project and learn from other RCPs!

