

## Case Profile

### FIVE PILLARS OF SUCCESS

## The Emergence of the Mount Grace Land Conservation Trust as an Exemplary Land Conservation Organization



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Cover photograph of Tully Mountain Outlook, Orange, MA (Tully and Packard Ponds from Tully Mountain), 16 September 2016, by “Coolkayaker1,” available on Wikimedia Commons at [https://en.wikipedia.org/wiki/Tully\\_Mountain#/media/File:Tully\\_Mountain\\_Outlook,\\_Orange,\\_MA.jpg](https://en.wikipedia.org/wiki/Tully_Mountain#/media/File:Tully_Mountain_Outlook,_Orange,_MA.jpg). Figure 3 (map of the Tully Trail) reproduced with the permission of The Trustees of Reservations. All other photos and figures in this report are courtesy of Mount Grace Land Conservation Trust.

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## CASE OVERVIEW FOR EDUCATORS

**Topic:** The Emergence of the Mount Grace Land Conservation Trust as an Exemplary Land Conservation Organization

**Subtopics:** Land Conservation Organization Governance

**Timeframe:** 1986 to 2021

**Primary Learning Goals:** To illustrate to land conservation practitioners the attributes of an exemplary local/small regional land trust that has grown rapidly since its inception more than three decades ago.

**Secondary Learning Goals:** To exemplify how key attributes, or pillars of success, are integrated into the professional practice of Mount Grace. These five pillars include: (1) administrative capacity, (2) financial acumen, (3) stewardship expertise, (4) ability to share knowledge and experience, and (5) cross-cultural competence.

**Primary Audiences:** Land conservation practitioners, students in the field of land conservation, managers investing philanthropic, governmental, or private resources into land conservation initiatives.

**Prerequisite Knowledge:** Basic understanding of land conservation practices in the United States and around the globe.

**Summary:** After 35 years in operation, the Mount Grace Land Conservation Trust has emerged as an outstanding example to other local and smaller regional land conservation organizations, both in the United States and internationally. It is recognized as a leader among capable and influential land trusts by visitors from Boston to Belize and beyond. This trajectory is especially impressive given Mount Grace's humble beginning in the mid-1980s as a three-person volunteer effort to protect a local tree farm.



*Mount Grace's Skyfields Arboretum headquarters sits in the midst of an expanse of protected forest in Athol Massachusetts.*

## TABLE OF CONTENTS

|   |    |
|---|----|
| Introduction.....                               | 1  |
| Administrative capacity .....                   | 4  |
| Financial acumen .....                          | 13 |
| Ability to share knowledge and experience ..... | 22 |
| Stewardship expertise .....                     | 26 |
| Cross-cultural competence.....                  | 31 |
| Conclusion .....                                | 38 |
| Appendix A.....                                 | 40 |
| Appendix B.....                                 | 41 |
| Appendix C.....                                 | 42 |
| References .....                                | 43 |
| Endnotes.....                                   | 46 |

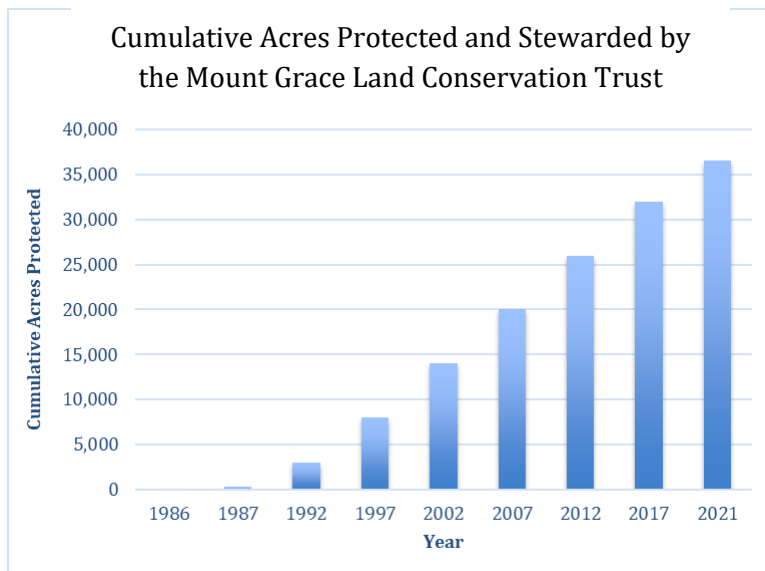


## Introduction

In 1986 the fate of the nation’s second oldest tree farm—the Lawton Tree Farm in Athol, Massachusetts—rested on a delivery from local businessman Jim Tedford. A small group of community members from Athol and nearby towns stood in the office of a local bank, tensely waiting for Tedford’s promised share of the collateral that would allow the newly formed Mount Grace Land Conservation Trust (Mount Grace) to pre-acquire the 365-acre parcel and save it from development. Mount Grace, which was formed earlier that year with a \$13 bank deposit, had already closed a deal to hold an easement on the Fittz property in Orange. It was fortunate to have a volunteer team of locals that had spent weeks pouring time and resources into the Lawton Farm conservation effort and had been assured that it would receive financial support for the deal from the state. Two local business owners had provided \$100,000 in collateral, and the Trust was ready to close on the deal. It was just a few dollars short. Then, Tedford appeared. He pulled up clutching a paper bag. Inside was \$50,000 in cash, enough to make the transaction.

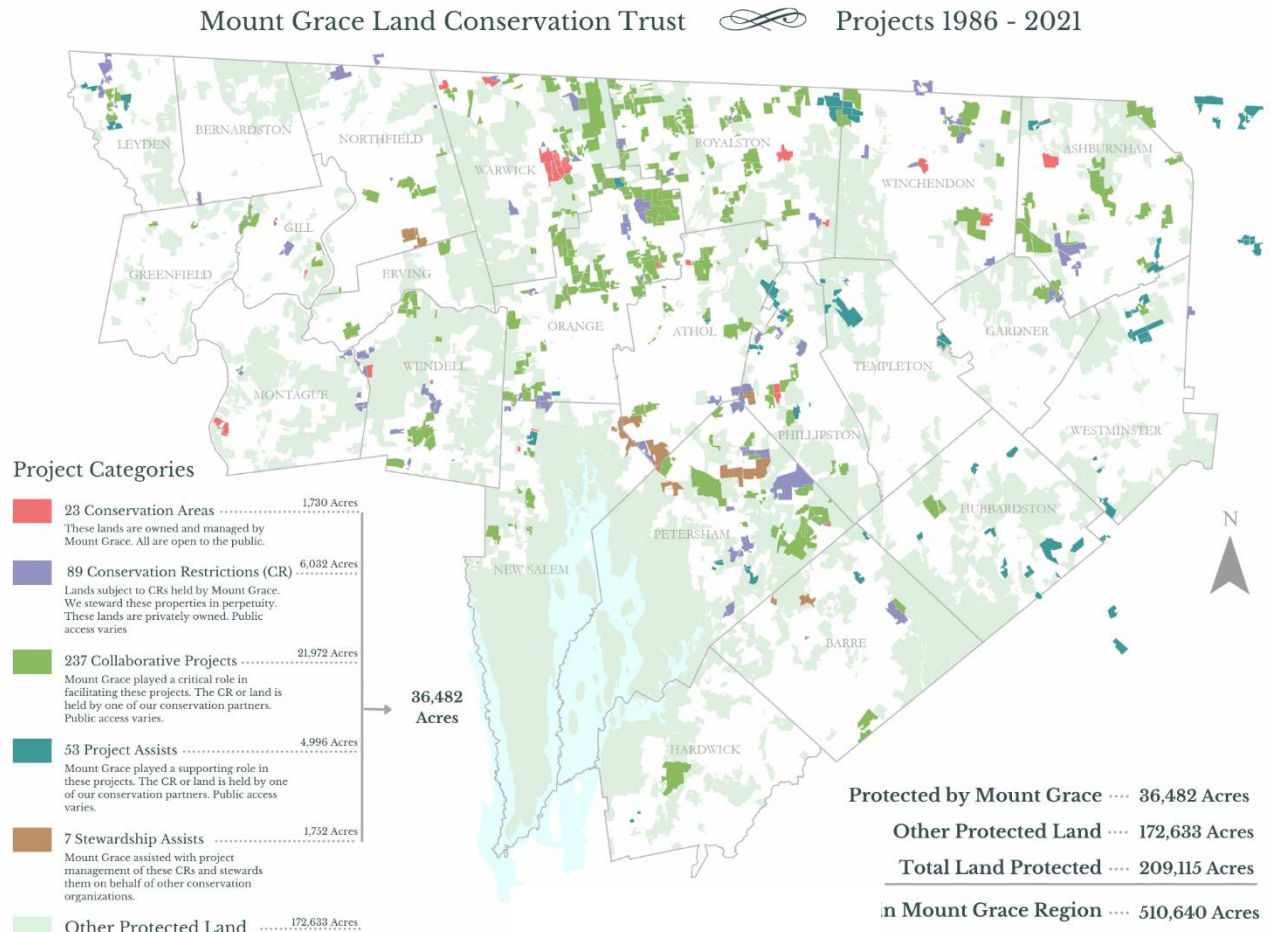
That afternoon, Mount Grace made its first land purchase, permanently conserving the area that would later become the Lawton State Forest, with the deal closing in 1987.

Despite the touch-and-go nature of its first transaction, this small, determined band of conservationists had succeeded in establishing what would, over the course of several decades, blossom into one of the most capable regional land trusts in the United States. Over the subsequent 35 years, Mount Grace increased its conserved land by a factor of 100, having helped protect 36,482 acres in Central Massachusetts by the close of 2021 (see Figure 1).



*Figure 1: By 2021, Mount Grace had cumulatively protected and stewarded some 36,482 acres – 100 times more than the 360 acres it had protected in 1987, after completing its first purchase to protect the Lawton Tree Farm (Data sources: Mount Grace Annual Reports, 2017, 2021)*

In 2021, the organization employed nine full-time staff members and hosted four TerraCorps members. It is the fiscal sponsor of the North Quabbin Regional Landscape Partnership—the first Regional Conservation Partnership (RCP) in the state—which it helped to create in 1997. And in 2013 it was among the earliest land trusts in Massachusetts to earn the Land Trust Alliance accreditation, a qualification which it continues to hold today.



*Figure 2: By the end of 2021 Mount Grace had assembled 23 fee-owned conservation areas, executed 89 conservation restrictions (easements), engaged in 237 collaborative projects, completed 53 project assists, and performed 7 stewardship assists across its territory, from the town of Westminster in the east to Greenfield in the west, Hardwick in the south, and the New Hampshire border in the north. These lands complement other conservation lands protected by public, private, non-profit, and academic institutions in the region. (Source: Mount Grace Land Conservation Trust Annual Report, 2021)*

Mount Grace has, over a third of a century, contributed to land conservation initiatives using a variety of methods, as illustrated in Figure 2. These include:

- Fee ownership of Mount Grace conservation areas,
- Conservation restrictions (the term used in Massachusetts for conservation easements),
- Collaborative projects with other entities such as the Massachusetts Department of Conservation and Recreation,
- Project assists with a variety of land conservation interests, and
- Stewardship arrangements.

Mount Grace's dynamism can be attributed to a chain of strong leadership and networking savvy, as well as a commitment to develop innovative and effective land conservation practices. The authors of this profile have organized this 35-year effort into five groups of achievement – the five pillars of success noted in the title to this case profile: (1) administrative capacity, (2) financial acumen, (3) stewardship expertise, (4) ability to share knowledge and experience, and (5) cross-cultural competence.

Recently, Mount Grace has committed to engaging in ongoing work and discussions regarding the current moment's most pressing issues. Land conservation practices have historically harmed and disenfranchised Black, Indigenous, and People of Color (BIPOC) communities and Mount Grace has been working to diversify its knowledge base, question who it works for, and draw in communities that have been excluded from its work in the past. Climate change has also intensified the urgency of land conservation and Mount Grace has prioritized tools and strategies that allow land trusts to respond to and mitigate the global climate crisis.

Mount Grace's holistic approach to land conservation is detailed in the following pages to provide a roadmap to organizational excellence for small and regional land trusts, both domestic and abroad. Each section represents one of five pillars for success as illustrated by Mount Grace's 35-year growth trajectory. While each land trust operates in a unique context of challenges and strengths, the lessons that can be drawn from this narrative will help any organization identify, commit to, and realize best practices, increase capacity, and make the greatest impact with the resources available.



## Administrative capacity

The Mount Grace Land Conservation Trust was created as a grassroots response to the proposed development of a 360-acre forest in Athol, Massachusetts in 1986. The Lawton Tree Farm was slated to be converted into a 200-unit subdivision before the all-volunteer organization purchased the area and conveyed it to the state to become the core of the Lawton State Forest. It did not take long for the organization, fueled by ambition and a can-do attitude, to realize just how big of a role it had stepped into. Over half of land in the state of Massachusetts is forested—81% in the Mount Grace region of north-central Massachusetts—but less than a quarter is permanently conserved, and Mount Grace was quickly faced with new and urgent projects.<sup>1</sup>

### **Box 1. Board Structure**

Mount Grace's board structure is integral to its ability to operate cohesively as it focuses on multiple areas of interest and promotes broad community engagement. As of 2022, board members convene every other month for a total of six meetings per year. Each member also serves on one or more committees or subcommittees, focused on a particular area of interest.

A land committee is responsible for evaluating potential projects against Mount Grace's core mission and conservation values. The finance committee, along with the investment subcommittee, ensures that funds, financial statements, and the budget are managed with integrity. And the stewardship committee—which had been focused for years on monitoring properties, promoting recreation and enhancing public awareness of local sites—is shifting to assure that stewardship plans and program implementation protocols used on Mount Grace's ever-widening portfolio of land advance well-articulated ecosystem management and forest resilience practices.

Additional committees include the executive, capital campaign, community engagement, development and recruitment, and facilities committees as well as the building efficiency and climate subcommittees. Each is composed of a mix of board members and non-board community members, with the board president being an *ex-officio* member of each. Most committees meet monthly, though some come together less frequently. By bringing together board and non-board members to discuss focus areas, Mount Grace actively engages with the community. This structure also helps Mount Grace recruit new board members when needed.

Diversity, equity, inclusion, and justice are integral to Mount Grace's leadership structure and are reflected in its board make up. There is consistently at least one farmer on the board and Mount Grace is working toward a goal minimum of three people of color on its board to better represent the region's diversity. Gender, LGBTQ+, and socio-economic diversity have regularly and reliably been considered in recruiting for the Mount Grace board.

In the beginning, board president Keith Ross did much of the organization's heavy lifting as a volunteer. With modest funding from a combination of local fundraising, individual gifts, and grants, Mount Grace was eventually able to pay Ross. As its first employee, he took on the title of president. Ross worked to hire additional staff as the scope of his work increased. By 1994 Mount Grace hired development staff and brought on Leigh Youngblood—who was quickly promoted to director of land protection, and eventually to executive director. The team was supplemented by a membership coordinator and 15-member volunteer board.

### *Creating a Regional Vision and Partnership*

Toward the end of 1992, David Foster, an ecologist and director of Harvard Forest, attended his first directors meeting as Mount Grace's newest board member. He left the meeting with one key concern: Mount Grace's portfolio of land and completed projects was growing rapidly, then pushing the 2,000-acre mark, but the group lacked a regional map of conservation land that would allow it to act strategically. How could the land trust effectively prioritize efforts to protect high conservation value parcels without a tool enabling it to view the region comprehensively?<sup>2</sup>

The solution to Foster's concern appeared the next morning, when Alisa Golodetz, a Hampshire College student, came to the Forest headquarters in Petersham. Golodetz was searching for a conservation-oriented thesis topic. Foster saw an opportunity to leverage a student's time and drive to produce a timely and critical resource for the conservation group. He proposed that she develop the map he envisioned needed as a guide for Mount Grace as part of a larger analysis of the history and changing nature of land protection in the North Quabbin Region. A year later, a hand-colored topographical map of the northern Quabbin reservoir was posted in a hallway outside the main conference room at the Forest. It has remained there for nearly three decades.

The map itself was only the beginning. It catalyzed a partnership between Foster and Golodetz who continued to work together to publish her thesis "History and Importance of Land Use and Protection in the North Quabbin Region of Massachusetts."<sup>3</sup> The article explored ecological and cultural factors that would shape the trajectory of land conservation in the region in the decades to come. It was peer reviewed by key Massachusetts conservation scientists, practitioners, and policy experts<sup>4</sup> and was published in *Conservation Biology* in February 1997.

The article came to a bold conclusion. Its authors warned that there was a narrow window of time available to meaningfully protect the state's undeveloped space.

An examination of the first 93 years of land protection reveals a unique and important conservation opportunity to protect large, typical portions of the landscape. Nevertheless, many years of land protection without coordination or a broad-scale plan has created threats. As development pressures increase, the opportunities for this area will only be fully realized with a clearly established vision, coordination among landowners, involvement of local residents, and participation of planners at the local, state and regional levels. Planning and coordination must occur soon before land available for acquisition decreases and management problems increase.<sup>5</sup>

At about the same time as the paper was published, the Massachusetts Department of Environmental Management held a regional conservation strategy meeting, recommending the formation of a regional conservation council in the North Quabbin area. Agency planner Andy Backman encouraged Youngblood and John O'Keefe, director of the Fisher Museum at Harvard Forest, to help lead the effort. In May of that year, Foster and Bruce Spencer, Mount Grace's board chair, hosted a public meeting regarding the council. Some 40 people attended, many of whom were interested in taking part in the initiative. That evening, the North Quabbin Regional Landscape Partnership (NQRLP) was launched.<sup>6</sup>

The NQRLP welcomed members representing a wide variety of organizations. Non-profit partners included Mount Grace and The Trustees of Reservations; the United States Army Corps of Engineers, the National Park Service, and the Massachusetts Department of Environmental Management represented the public sector; and academic institutions willing to participate included the Harvard Forest and UMass Amherst. Cross-sectoral collaboration took many forms. For example, Brian Hall, a Geographic Information Systems expert at the Harvard Forest has played a significant role sharing his expertise with Mount Grace and the NQRLP, mapping and analyzing conservation opportunities in the region, and training staff to use emerging GIS-based tools.

As the home base for the newly formed NQRLP, Mount Grace was bolstered by a wide array of organizational and individual allies. The partnership allowed organizations to pool resources, knowledge, and expertise to streamline land protection efforts. The first successful initiative of the new partnership came a few months after its formal creation, when Charlie Tracy of the Rivers and Trails program of the National Park Service stepped forward to help Youngblood fund an initiative to protect a relatively large parcel on and around Tully Mountain.

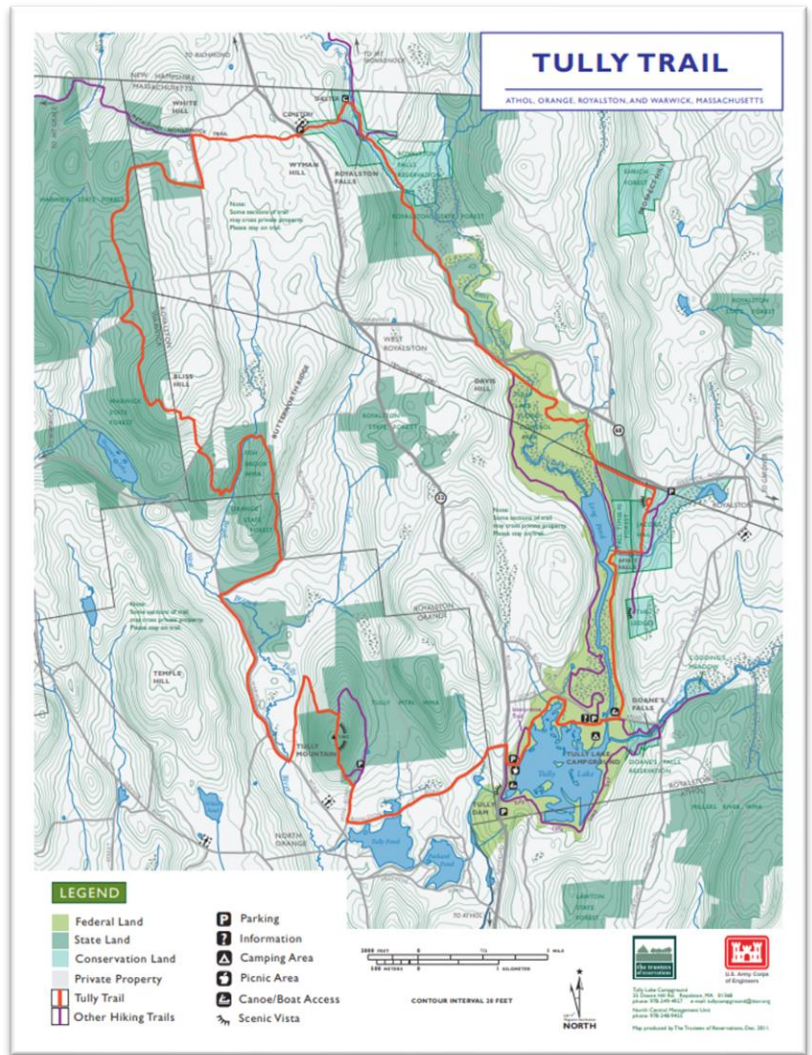
By March of 1998, Mount Grace signed an option-to-buy agreement with the heirs of Roy and Marjorie Wetmore, paving the way for the Massachusetts Department of Fish and Wildlife to purchase a large parcel on and around Tully Mountain.<sup>7</sup> Several public and non-profit officials, including Massachusetts Secretary of Environmental Affairs Trudy Coxe, celebrated the purchase when it was finalized on July 29 of that year, boosting Mount Grace's visibility.

In the first half of 1998, the initial effort to protect the Tully Mountain property was being wrapped up. But more expansive ideas were gaining interest from NQRLP partners. The group's board meetings were abuzz with a concept from Dick O'Brien, then central regional director of the Trustees of Reservations, and Rick Magee, interpretive coordinator for the U.S. Army Corps of Engineers. For years the two had been formulating a plan to create the Tully Trail, a hiking path that would circle Tully Lake in Royalston, Massachusetts, and connect several key locations across the region.

With Tracy’s enthusiastic participation, the concept continued to gain momentum, becoming the NQRLP’s second significant initiative. O’Brien presented a formal proposal for endorsement of the trail at a 1999 NQRLP meeting. The project created a true partnership of the National Park Service, The Trustees of Reservations, the U.S. Army Corps of Engineers, the Massachusetts Department of Environmental Management, Mount Grace Land Conservation Trust, the Massachusetts Division of Fisheries and Wildlife, and the Appalachian Mountain Club.<sup>8</sup>

Mount Grace was a key player in recruiting and managing dozens of volunteers who got their hands dirty building the 22-mile Tully Trail (see Figure 3), which was substantially completed in 2001.<sup>9</sup> It used a grant from the Massachusetts Department of Environmental Management Trails and Greenways to bring on a graduate student to fill a four-month position as coordinator of volunteers. Gary Culver was responsible for on-the-ground trail layout, conducting outreach and recruitment, and organizing and supervising volunteer workdays.<sup>10</sup> In this position, Culver made considerable headway expanding Mount Grace’s community presence. He worked with organizations as varied as the Athol YMCA, local selectmen’s boards, AmeriCorps, and a spontaneously formed group known as the “Tully Trail Hiking Club.”<sup>11</sup>

Several political leaders took notice of this ongoing effort by Mount Grace and the NQRLP. In 1999, Republican Paul Cellucci, who grew up Hudson, became Governor of Massachusetts. He appointed Democrat Bob Durand, also from Hudson (about 45 miles southwest of Tully Lake), as his Secretary of Environmental Affairs. Cellucci issued Durand what he called ‘marching orders’ to make sure 200,000 additional acres of open space in Massachusetts was protected over the next ten years.<sup>12</sup>



*Figure 3: The Tully Trail in Athol, Orange, Wendell and Royalston, MA. Map produced by The Trustees of Reservations, December 2011.*

Durand himself tells the story of how he approached Youngblood to undertake the effort:

It was in the fall of 2000. I met Leigh Youngblood at Ralph Longg's restaurant in Athol with Chuck Anastas, my chief of staff, and Arthur Bergeron, my undersecretary for land protection. I had the power of five state agencies and 3,500 employees. Leigh had herself and one staff person. I told Leigh our predicament: we wanted to protect 200,000 acres of land and create a couple of bio-reserves of 15,000 acres or more around Massachusetts, and we only had a few years to do it. I asked her if she could spend over a million dollars on protecting 1,000 acres of land within the Tully area in a year, and we promised more funding the following year if she could – a lot more funding. You could see the wheels turning and, honestly, she said 'I can try, but I'm going to need more help!'<sup>13</sup>

Once the effort, dubbed the Tully Initiative, was underway, it built momentum quickly. The campaign was structured as a collaborative effort with the state and other interest organizations. It was the state that acquired conservation restrictions in the region, based on a standardized offer distributed and negotiated by a Mount Grace team.

Durand remembers being overwhelmed by what Mount Grace was able to accomplish in such a short amount of time with Youngblood at the helm. In six months, the land trust had protected 4,200 acres across 80 tracts and held by 43 different landowners in four towns. "Who was this woman?" he wondered of Youngblood. In the end, he concluded that it was her willingness to take a risk that other, even larger, land trusts would not have dared—along with access to several high-powered partners, including the New England Forestry Foundation, and state, federal, and local agencies—that made the feat possible. On December 3, 2002, Durand and his team dedicated the North Quabbin Bioreserve, the first of two bioreserves established during his tenure as secretary.

After two years, the Tully Initiative had protected 9,100 acres, helping to defragment the region's landscape. "It has left a lasting legacy in this valley," said Durand, who called the accomplishment a national model for larger landscape-scale land protection. The result protected and enhanced biodiversity and created recreational opportunities, together, maintaining the Tully Valley's unique rural character.<sup>13</sup>

The project changed Mount Grace as well. The rigor of the work had put pressure on the land trust to increase its staff and the influx of state funding for the Tully Initiative allowed it to do so. Over the course of the project, Mount Grace expanded to include two conservation professionals, two development and administration staff members, and a part-time land steward, responsible for overseeing and monitoring 16 conservation areas and 30 easements, stretching over 3,434 acres. The bulk of the land acquired through the Tully Initiative was stewarded by the state and other conservation non-profits.





*A view of the 207-acre Vento property from across Tully Lake*

When the Tully Initiative was completed in 2002, Mount Grace was able to retain its expanded staff size. But the work that lay ahead required it to keep building its forces.

### *Responding to growing urgency with help from an anonymous donor*

A few years later, in 2005, the urgency of Mount Grace's work was emphasized by two reports on the state of conservation in Massachusetts. The Open Space Institute (OSI) released "Western Massachusetts: Assessing the Conservation Opportunity," which called out funding cuts resulting in a three-year backlog of land to be conserved.<sup>14</sup> It showed that 65% of farms and 80% of forests west of Worcester were not yet conserved and identified Mount Grace's Quabbin region as facing the greatest threat. Meanwhile, Harvard Forest published its report "Wildlands and Woodlands," calling for an additional 1.5 million acres of the state's land to be protected.<sup>15</sup> The latter report also highlighted the work of the NQRLP as an exemplary woodland council.

These reports prompted a needs assessment by the Land Trust Alliance, which determined that the region's land trusts needed to increase their organizational capacity. Much of the conservation work happening in Western Massachusetts was being completed by small all-volunteer organizations with limited resources and capacity. Mount Grace wanted to empower its less-resourced peers and spread staff capacity across the region. To support his commitment, it launched Common Ground, an initiative to establish a regional stewardship program that would leverage young and emerging conservationists to expand collaboration and engage more volunteers at Massachusetts land trusts in exchange for training and a stipend.

## Box 2. Creating MassLIFT and TerraCorps

By 2007, with its team of 10 full-time employees, Mount Grace was now one of the region's larger land trusts and its focus was not only on its own expansion but on bolstering the community. Fueled in part by the results of the OSI report, Mount Grace and the NQRLP envisioned a program that could be adapted to support the staffing needs of the region's smaller conservation organizations. A pilot Common Ground Initiative became a reality in September 2008 after the Massachusetts Service Alliance awarded Mount Grace \$57,700 to cover program costs and stipends for five volunteers serving in the newly minted Commonwealth Corps.

The corps was modeled after the national service-learning program AmeriCorps. Volunteers were deployed to host organizations for a year of service. Mount Grace's conservation-focused Common Ground Initiative hosted volunteers in four distinct roles. Land stewards monitored protected land; outreach coordinators engaged community groups; regional conservationists facilitated new projects; and service-learning coordinators worked with youth to foster an appreciation farming, forestry, and the land.



The program was a success from the start. In its first year, corps members initiated 22 new conservation studies and recruited an additional 320 volunteers for service projects. Common Ground was recognized for its work in 2010 when it won funding directly from AmeriCorps. This new partnership came up with \$260,000 in stipends that allowed for an additional 15 members serving in partner land trusts across Massachusetts. The program was renamed the Massachusetts Land Initiative for Tomorrow (MassLIFT).

Mount Grace brought on a new team member to manage and coordinate the program. After 10 years, the program became an independent entity of AmeriCorps, renamed TerraCorps. Today, stipended program volunteers are still integral at Mount Grace and other regional land trusts. The program is also an effective career springboard for budding conservationists. Following their TerraCorps service, program members frequently transition into staff positions at their placement organization.



At this point, Mount Grace was also working to increase its capacity internally. In 2006, it brought on a consultant to design and implement a staff expansion plan. Key to implementation of the new design was the creation of two additional project staff positions, including a director for the NQRLP, and two development staff to head outreach and fundraising. Its stewardship position was also upgraded, going from part time to full time, and it diversified its board membership. To boost its community profile, Mount Grace decided to leverage state and federal service programs, such as AmeriCorps, which provided additional staff and allowed it to pass on knowledge and expertise to budding conservationists.

This expansion plan, which increased Mount Grace's staff from five to ten employees and doubled its operating costs, was initially funded by an anonymous angel donor. The donor committed to funding the first year of the staff expansion in full. Over the next four years, the size of the grants tapered off, with the expectation that the new development staff would fill in the gap by revving up fundraising activities.

In addition to the staff expansion, Mount Grace realigned the key responsibilities of its executive director to focus on fundraising and began to lean into ambassador projects. Ambassador projects are high-profile conservation initiatives carried out in concert with a project-focused fundraising campaign. The campaigns are designed to expand community outreach and increase membership. With expanded grant and donor research and newly established donor cultivation programs, Mount Grace was able to transition from the angel-donor model of support to covering its expenses independently.

### *Facing history and the current moment*

Mount Grace's most recent staff addition is a full-time climate and land justice specialist, hired to address rising awareness and urgency surrounding social and environmental crises that are especially pertinent to the conservation community-of-practice. The creation of this position is attributable, at least in part, to a study of the inequitable history of land conservation. The project was led by graduate students from the Yale School of the Environment (YSE), complemented by discussions with Peter Stein of the Lyme Timber Company, and overseen by Brad Gentry at YSE.

Today, Mount Grace is challenged with the need to increase its revenue streams to ensure it can provide competitive salaries to its staff. With the emergence of remote work, it recognizes the need to measure up to out-of-region wages. Funding for operating costs is also more difficult to obtain than project funding, especially for large, high-visibility initiatives. To accommodate its current financial needs, Mount Grace is in the process of establishing several new sources of revenue, including an increased endowment that will be enabled through the ambitious *The Land Forever* campaign.

### Box 3. Cultivating leadership



Keith Ross

Three key personalities have guided Mount Grace for most of its 36 years. Keith Ross, a professional forester, Mount Grace founder, and the first board president, served as the organization's first paid staff member. He was integral to Mount Grace's trajectory from its earliest days, working tirelessly to raise and power the land trust from its inception in 1986 until 1994, when he passed the baton to his protege, Leigh Youngblood. At that time, Ross moved on to serve as vice president and director of land protection at the New England Forestry Foundation but continued to serve on Mount Grace's board.

Leigh Youngblood, who was working on a degree in Conservation and Land Stewardship Economics at the University of Massachusetts Amherst, first approached Ross as a student. She was later hired by Mount Grace as a land protection assistant in 1994.<sup>16</sup> That fall, she was promoted to director of land protection, taking over the organization's top role from her mentor. Under her direction, Mount Grace grew rapidly. In 1995, Mount Grace reported protecting a cumulative total of about 7,000 acres; by 2020, when Leigh retired, the Land Trust had protected 35,000 acres across the region and was widely recognized as a national leader in land conservation.

In 2020, Emma Ellsworth—a native of western Massachusetts—took over from Youngblood, after working alongside her for a year as deputy director. Ellsworth had proved herself to be a skilled leader working as the international vice president of UNITE HERE, a labor union that represents 300,000 hospitality workers across the United States and Canada. Once she took the helm at Mount Grace, Ellsworth quickly earned the respect of her peers in the land trust community and of Mount Grace members, donors and community partners. Under her leadership, Mount Grace was awarded the Land Trust Alliance's 2022 Land Trust Excellence Award for staffed land trusts, distinguishing the organization as one of the best-managed land trusts in the United States.



Emma Ellsworth and Leigh Youngblood

## *Lessons from Mount Grace's administrative growth*

Mount Grace emerged at a time when its mission was particularly relevant to the changing landscape of Massachusetts. The state bloomed with development and its urban growth threatened the Commonwealth's extensive forests and farmland. Though it began with a small staff, Mount Grace was innovative and efficient in leveraging both internal and external sources of people power to maximize its impact.

Though ambitious for a small trust, the Tully Initiative proved an important turning point in Mount Grace's history. By leading this high-profile project, Mount Grace gained visibility and funding to build its in-house staff and create a lasting network of support that greatly increased its capacity. As much as Mount Grace has leaned into the community to bolster its own resources, it has also prioritized giving back. Both TerraCorps and the NQRLP trace back to Mount Grace and continue to serve as invaluable resources and infrastructure elements for conservation organizations across New England.

Though the size of its staff, which more than doubled since its inception, has remained relatively stable for the past decade, Mount Grace continues to evolve in response to new priorities. Most recently, positions have been added and adapted to promote diversity, equity, inclusion, and justice (DEIJ), to facilitate cultural and climate action, and to accommodate internal expectations for better pay and financial stability.

## **Financial acumen**

As the size and complexity of its staff grew over the decades, Mount Grace consistently worked to build robust funding strategies. It has operated consistently on a budget of community donations and grants, supplemented by a small endowment; however, funding for its large landscape-scale projects, often flowing from multiple sources, has called for careful handling and organization. The region is also developing rapidly, requiring land trusts to operate quickly and dynamically to conserve land when it becomes available. To meet its financial and managerial needs, Mount Grace turned to collaborative methods, leaned into government funding, and created its own revenue streams by developing new financial tools and strategies.

At the end of its first decade, Mount Grace began publishing annual reports that included detailed financial summaries of each year's costs and revenue. Its first annual report, for the year ending in May 1996, showed that its largest source of revenue was from contributions. It brought in \$34,645 in grants, total expenses hovered near \$74,000, and net assets were just larger than \$700,000 (see Appendix A). By 2005, a larger staff and revved up conservation activity had more than doubled Mount Grace's total expenses, which reached \$265,000. Its net assets had also grown, topping \$1.9 million (see Appendix B). By 2021, total expenses neared \$788,000, and net assets, boosted by an ongoing capital campaign, were in excess of \$4 million (see Appendix C).



### *Collaborating to mitigate competition and attract funding through ambitious projects*

The NQRLP has been key to enabling the most financially ambitious initiatives in the region. The speed of development in Massachusetts in recent years has put pressure on land trusts to increase the scale and pace of conservation.<sup>17</sup> Much of the most urgent work involves several landowners and partners. These multi-stakeholder projects can be arduous and drain financial and managerial resources when taken on individually.<sup>18</sup> Collaboration spreads stresses across a network of organizations, making it possible to undertake larger projects.

The NQRLP not only allows land trusts to share resources, collaborate on projects, and draw on each other's knowledge and experience, it also opens doors to funding opportunities. Together, member land trusts are able to access large pools of money for high-profile projects that protect land in aggregate. The partnership creates a ladder, allowing members to stand on each other's shoulders to reach high-hanging fruit that no individual organization would be able to attain on its own. This has the added benefit of reducing competition for smaller grants.

### *Leveraging government funding*

Mount Grace has successfully attracted funding from several federal grant programs to enable some of its most expansive and relatively expensive conservation projects. It established an impressive track record of obtaining these funds both individually and as part of the NQRLP. On multiple occasions, Mount Grace has been awarded funding from the federal Forest Legacy Program (FLP). The program, administered by the U.S. Forest Service in collaboration with state agencies, aims to encourage private land protection through easements and land purchases and covers up to 75 percent of the project costs for selected initiatives.<sup>19</sup>

In 2013, the NQRLP submitted an application for the Quabbin to Wachusett (Q2W) project. The two-phase initiative was aimed at conserving a 20-mile forest corridor stretching from the Quabbin Reservoir to the Wachusett Reservoir. The application was ranked second in the nation and first among Massachusetts proposals.<sup>20</sup> Across both phases, the NQRLP was awarded over \$7 million in Forest-Legacy funding. In total, the partnership brought in and managed over \$10 million in both public and private funding, enabling it to successfully complete the project by 2018.

Q2W created a model for FLP funding that can be applied in the Northeast where land is highly developed and fragmented. It also demonstrated Mount Grace's ability to attract competitive federal funding, manage significant public and private funds, and act as a fiscal agent on behalf of municipal partners.

State funding is also a major source of revenue for Mount Grace. The trust has been directly involved with more Massachusetts Landscape Partnership Program (LPP) funded efforts than any other land trust in the state. LPP grants fund projects that protect 500 acres or more through public and non-profit partnership, which aligns with Mount Grace's operating profile.

Most recently, Mount Grace acquired LPP funding to enable the Greater Gales Brook Conservation Project, a collaborative initiative to protect 700+ acres in the Millers River watershed.<sup>21</sup> The project highlights the organization’s ability to lead a joint-fundraising campaign, utilize an internal revolving loan fund to pre-pay landowners’ expenses, and coordinate a \$1.4 million budget on behalf of all partners.



*A moose sighting on this field adjacent to the lands of the Greater Gales Brook Conservation Project is proof of the initiative’s role in protecting open space for diverse species of flora and fauna.*

### ***Developing innovative tools and strategies; embracing risk***

Mount Grace is often on the front lines of innovation, developing and pioneering frameworks and technology to expand the horizon of what is possible. One such development is a tracking tool nicknamed the “Big Momma” spreadsheet. The tool allows staff to capture line-item level details of expenses and funding sources for each project within a landscape-scale initiative, while simultaneously providing a snapshot of the aggregate budget. Mount Grace developed the Big Momma to manage LPP grant funded projects and it has since become integral in its leadership of subsequent initiatives. Staff use the tool to track required matches, nimbly and effectively allocate funding, predict and address funding gaps, and aim for consistent financial contribution from participating landowners.

Mount Grace has also increased its risk tolerance to best leverage financial resources. In 2022, the organization pre-acquired a priority parcel it had been eyeing for over two decades. Its state-agency partner could not meet the full fair-market value, which meant Mount Grace faced a

\$100,000 shortfall unless it could raise the difference. In the early 2000s, it had taken a similar risk in purchasing a parcel and had lost \$90,000. Since then, it tightened its risk-assessment procedures and became more adept at setting ambitious but pragmatic fundraising goals. After careful consideration, staff, board members, and the finance committee agreed to take on the risk and purchase the parcel. Ultimately, Mount Grace was able to raise the additional funds within three months of owning the land and suffered no losses from the transaction.

Mount Grace is also often willing to take chances on new sources of state funding as they emerge, such as the Massachusetts Conservation Land Tax Credit Program and the Massachusetts In-Lieu Fee Program.

Other tools and strategies Mount Grace has built or utilized include:

- The Local Landscape Collateral Fund, which allows supporters to pledge Certificates of Deposit as collateral for project loans when the funding source functions as a reimbursement.
- The Leigh Youngblood Conservation Opportunity Fund (modeled on the Revolving Loan Fund), created by a donor with the intent of facilitating project development by eliminating upfront costs for private landowners. Owners are compensated for their land or conservation restrictions and make reimbursements to the fund after their land is conserved. This helps fuel future projects.
- Bridge financing, or the use of external loans from local banks and the Conservation Fund to complete projects. This has eliminated the participation barriers for rural towns where a municipal partner—instead of Mount Grace—will hold the fee interest or conservation restriction for a real-estate transaction.
- Bundling due diligence expenses with partners to make more efficient use of monetary and human resources, and
- Joint fundraising campaigns.

Despite its enthusiasm for emerging opportunities, Mount Grace is careful in assessing risks and forging new paths. Carbon offset programs are gaining popularity in conservation across the country and Mount Grace initially considered taking advantage of these government incentives. Such programs seemed to be a solution to its limited donor base and intermittent funding streams and would simultaneously further its commitment to combating climate change.

Over 18 months, Mount Grace explored this possibility. There were meetings with offset developers and land trusts that had successfully executed offset projects, as well as internal consultations with Mount Grace's forester and climate subcommittee. What the organization found was that there were several barriers and drawbacks to these programs. Most options threatened flexible land use and included land-area minimums that would complicate Mount Grace's participation.<sup>22,23</sup> Additionally, it determined that many offset programs did not accurately reflect climate impacts and would be inconsistent with Mount Grace's stance on the

urgency of climate action.<sup>24,25</sup> While it is still tracking emerging programs that might better serve its mission, Mount Grace elected not to pursue the set of options under consideration.

### *Driving membership and fundraising capacity*

Mount Grace is also supported by the community members who recognize its service and have the capacity to give back. In the year ending May 2021, more than half its revenue, about \$514,720, came from gifts and memberships. Since its inception, Mount Grace has engaged with its members through newsletters and other media outreach. *Views from Mount Grace* goes out to members seasonally. It updates the community on its activities and accomplishments, reflects on the land and environment, and recognizes larger donations.

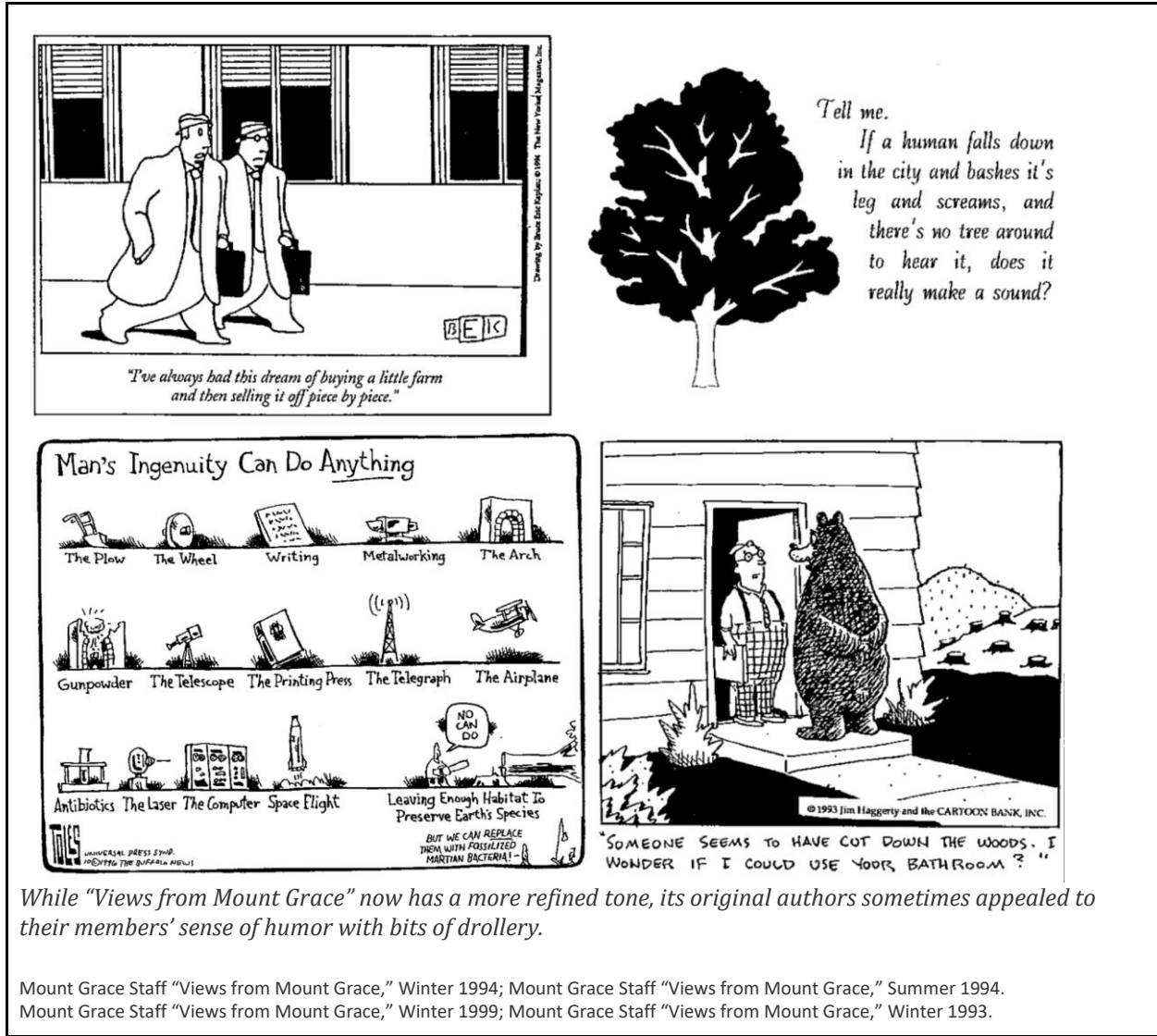
The bulk of individual gifts to Mount Grace typically comes at the end of the fiscal year in April and May, and again at the end of the calendar year, in November and December. Mount Grace sends out appeal letters twice annually, in April and November. It begins each appeal season by raising a pool of funds to offer gift matching for donations of a certain type or amount.

As it built its staff over the years, Mount Grace also expanded its fundraising capacity. Today it employs a full-time major gifts and grants manager and a membership and administration coordinator. It has also recently refocused the role of its executive director to commit greater attention to attracting individual donations as well as supporting foundation outreach.

Board and non-development staff are also being incorporated into Mount Grace's fundraising strategy. Staff and board members meet with mid-level donors for annual appeals; board members lead fundraising meetings; and "friends of" groups have been established to recognize members who support fundraising for ambassador projects within their communities.

Mount Grace also has a number of business-partnership models that enable ongoing workplace giving, including:

- Gift Matching programs, under which employers pledge to match employee gifts, effectively doubling a donor's impact,
- Commonwealth of Massachusetts Employee Gifts, a program that incentivizes state employees to support nonprofit organizations, and
- Business sponsorship, which facilitates partnerships with local businesses that are interested in sponsoring events, becoming a member, promoting employee volunteer opportunities, or otherwise supporting Mount Grace's work.



While "Views from Mount Grace" now has a more refined tone, its original authors sometimes appealed to their members' sense of humor with bits of drollery.

Mount Grace Staff "Views from Mount Grace," Winter 1994; Mount Grace Staff "Views from Mount Grace," Summer 1994.  
 Mount Grace Staff "Views from Mount Grace," Winter 1999; Mount Grace Staff "Views from Mount Grace," Winter 1993.

To further ensure its fundraising strategies are as efficient as possible, Mount Grace opens its doors to critique. Every few years, Mount Grace’s fundraising is advised by external consultants who review its procedures and practices for bringing in funding. The consultants look at Mount Grace’s materials and facilitate conversations about what is going well and where Mount Grace is considering changes and identify areas for improvement.

**Maximizing the impact of funding by valuing co-benefits**

The Food and Agriculture Organizations of the United Nations defines four areas of ecosystem services, or benefits nature provides to society.<sup>26</sup> *Provisioning services*, such as food, water, and timber, supply material benefits to humans. *Cultural services* are non-material benefits which society reaps from being immersed in nature, such as aesthetic enrichment, inspiration, and cultural and spiritual identity. *Regulating services* keep people healthy by maintaining clean air and soil and pollinating crops. *Supporting services* are the framework for all other ecosystem



services. They provide flora and fauna with living spaces and promote genetic diversity. Mount Grace uses ecosystem service concepts such as these in planning its conservation agenda, prioritizing projects that have a positive impact in these four areas. Examples of projects that increase the impact of each dollar spent by promoting co-benefits include:

- Provisioning services: The Q2W initiative, which protected a 20-acre forest corridor from the Quabbin Reservoir to the Wachusett Reservoir, hinged on conserving woodlands that serve as a natural filtration system for the drinking water of 2.5 million people in the metro-Boston area,
- Regulating services: At Mount Grace Headquarters—Skyfields Arboretum—the land trust funded, designed, and created pollinator gardens to support ecosystem health,
- Supporting services: Mount Grace manages a mosaic of forest resources and their associated habitat value; it has installed a slash wall to enhance tree regeneration, forest resiliency, and habitat quality. Most recently, it began utilizing mitigation funding, collecting fees on projects that impact aquatic resources and reallocating those dollars to purchase forestland with high-quality aquatic resources,
- Cultural services: Partnerships established with municipalities help to build parks and provide access to natural spaces—Mount Grace conducts this work with an eye on historical patterns of exclusion and discrimination that it hopes to disrupt; Mount Grace has also added line items to several grants to pay Indigenous partners for their contribution of cultural and traditional knowledge while working to help Mount Grace develop conservation and management plans.

### *Campaigning to build endowment*

While people and organizations are often eager to support high-profile conservation projects, it can be more difficult for land trusts to attract funds to support day-to-day operations. Mount Grace strives to provide fair and competitive salaries to its staff. Today, in the emergent world of remote work, the organization must compete with out-of-region pay and its need for a reliable source of funding for daily operations is ever more urgent.

Because piecing together small sources of funding to keep its head above water is no longer a sustainable option, Mount Grace launched *The Land Forever* campaign. The campaign aims to attract \$3.5 million, the majority of which will be added to its existing endowment to create a permanent new income stream. At the same time, outreach conducted for the campaign will deepen connection with donors and increase the fundraising skills of board and committee members.

### *Creating a brand of integrity and reliability through accreditation*

Transparency and accountability are cornerstones for every land trust that strives to bring in funding from diverse and competitive sources. Landowners, grantors, and donors need to be sure their contributions will be used in the way they are intended for years, decades, or—in many cases—in perpetuity. Mount Grace relies on donations of land and funding from myriad sources, including individuals, state, local, and federal government, nonprofits, and private businesses. To do so it has had to foster careful and trusting relationships and maintain its image as a reliable and capable community resource. In 2013, it took advantage of a new opportunity to commit to transparent and accountable practices. Five years earlier, the Land Trust Alliance (LTA) Accreditation Commission had emerged to serve as a watchdog for land trusts in the United States.

The commission developed its accreditation program as a way for land trusts to assure stakeholders that they are trustworthy and to challenge them to be their best. Organizations achieve accreditation by demonstrating excellence in governance, finance, transactions, and stewardship.

Mount Grace was among the first land trusts in the country to achieve accreditation, receiving its seal in 2013, ahead of 85% of its peers. It successfully renewed its accredited status in 2018 and is in the process of renewing again in 2023.

#### Box 4. Accreditation

Mount Grace embarked on its initial accreditation cycle in 2011, a process that involved fastidious documentation. Mount Grace underwent a yearlong examination of its systems for board and staff accountability; fundraising, recordkeeping, and stewardship practices; and project choice. This was followed by a public-comment period when community members communicated directly with the LTA regarding Mount Grace. They could share concerns about the organization or endorse its merit. The organization ultimately achieved accreditation in 2013.

For all applicants, accreditation is an eight-step process. Land trusts must be U.S.-based 501(c)(3) tax-exempt public charities or quasi-governmental organizations to be eligible. The land trusts are evaluated based on their performance across four major categories: governance, finance, transactions, and stewardship. Each category is further divided based on targeted “indicator elements” that provide clear and measurable goals for applicants to meet.

## A Mark of Distinction

The accreditation seal **AFFIRMS** national quality standards are met.



- SOUND FINANCES**
- ETHICAL CONDUCT**
- RESPONSIBLE GOVERNANCE**
- LASTING STEWARDSHIP**

[www.landtrustaccreditation.org](http://www.landtrustaccreditation.org)

The accreditation process is not simply a bureaucratic exercise; it is built to facilitate the development of better practices and documentation among applicants. As such, applicants often develop new protocols, tidy their administrative systems, and become more habitual about record keeping as they strive for accreditation. In its first application cycle, Mount Grace carefully evaluated its baseline reports (reports documenting the physical condition of a parcel during its initial protection) using a newly drafted checklist. Staff sifted through to identify missing content and created a master spreadsheet with the results. When possible, it filled in missing information and made note of where it was not available. Additionally, it took a critical look at its compliance with charitable solicitation laws and created a new plan to better adhere to best practices.

Even after an organization is approved, it continues to be responsible for upholding its established protocols and staying up to date on changes to LTA standards and practices.

In 2018, Mount Grace renewed its accreditation. Once again, it made several changes to improve itself throughout the process. Mount Grace will submit information regarding its next accreditation round in 2023.

## *Lessons from Mount Grace's financial strategies*

Mount Grace has its roots firmly planted across several sectors, drawing from myriad public and private funding pools. It has a track record of attracting capital from some of the most competitive government programs, including the FLP and LPP. Partnership has been a key tool for accessing these larger grants. As part of the NQRLP, Mount Grace has been able to work on ambitious projects that protect large swaths of the New England landscape and stand out as exemplary conservation initiatives even on a national scale.

In recent years the organization has tailored its staff and board focus to bolster fundraising capacity. This has included working closely with the community on ambassador projects that can be used to attract funding, as well as building donor cultivation programs to increase per-capita giving. Mount Grace has also displayed the LTA's seal of accreditation since 2013. The branding helps it embody its image as a transparent and trustworthy steward of the land and assures potential donors and grantors that Mount Grace will manage their gifts as intended in perpetuity.

Individual gifts from community members are also integral to Mount Grace's financial strategy, accounting for over half its annual revenue in 2021. It conducts regular, strategic outreach to the community throughout its fundraising cycle. This includes engaging with members through its seasonal newsletter and sending out appeal letters twice a year. Gift matching and the consideration of co-benefits are used to maximize giving and gift impact throughout the year.

## **Ability to share knowledge and experience**

As a leader in innovative land conservation, Mount Grace considers it a critical part of its mission to disseminate its knowledge and experience. Massachusetts is home to the Trustees of Reservations, the oldest regional land trust in the world, and is second only to California in the number of local and regional trusts within its boundaries. Mount Grace is situated in the center of this well-resourced state and realized early on that it was poised to serve as an asset to its neighbors. Mount Grace also recognized the potential benefits it could reap from peer organizations. But effective collaboration takes time and trust, so Mount Grace staff began pondering how they could reduce the burden of sharing stories and lessons among land trusts.

How could the North Quabbin conservation community build on its collective capacity instead of exhausting resources by having each local organization chase the same solutions? The answer was an innovative network of conservationists interested in collaborating to coordinate work and increase project capacity.

As noted above, in 1998, Mount Grace, Harvard Forest, and the Massachusetts Department of Environmental Management came together to form the first Regional Conservation Partnership (RCP) in Massachusetts, the second in New England after New Hampshire's Great Bay Resource Protection Partnership. Over 40 people attended the first public meeting regarding the partnership and stakeholders, including landowners and members of myriad organizations volunteered to form a steering committee.<sup>27</sup> In the early months of the NQRLP, a day-long, facilitated charette was held to create a vision endorsed by all the partners.

The original steering committee members adopted the following mission statement:

*"The members of the North Quabbin Regional Landscape Partnership will collaborate to identify, protect, and enhance strategic ecological, cultural, and historic open space in the rural landscape of the North Quabbin Region"*

What emerged was the North Quabbin Regional Landscape Partnership (NQRLP), a voluntary association of state and local organizations working together to conserve the Greater Quabbin Region. Today, Mount Grace facilitates regular NQRLP meetings to promote collaboration and knowledge sharing. The partnership has enabled targeted training programs; the development and implementation of multi-landowner, multi-partner projects; utilization of cutting-edge science and technology to quickly respond to challenges; the quick and reliable dissemination of information; high-quality landowner outreach programming; and the amplification of collaborative success stories, such as the story of the Tully Trail.

Since then, the NQRLP has initiated and successfully completed several large landscape projects including:

- The Southern Monadnock Plateau initiative, which worked with 19 landowners to protect a collective 2,270 acres using funding from the federal Forest Legacy Program,
- Phase II of Southern Monadnock Plateau initiative, which conserved another 2,000 acres belonging to 18 landowners, and
- Quabbin-to-Wachusett project—the highest ranked Forest Legacy project in the state and second in the nation—which was awarded \$7 million to protect 27 tracts of land in the North-Quabbin region.

### *Furthering outreach through hub work*

After the LTA published its Western Massachusetts land-trust needs assessment, which found that small, mainly volunteer trusts across the state lacked access to professional staff, Mount Grace responded to the proposal that larger trusts serve as "hubs." These professionally staffed hubs would share their expertise and staff capacity with smaller volunteer organizations. With private grant funding secured by Mount Grace, the NQRLP hired its first full-time coordinator in 2006, an individual with background in community organizing.



MassLIFT, (see Box 2), was a further response to the need for greater knowledge and resource sharing. The program's aim has been to support regional and local organizations in a way that respects their autonomy and unique individual strengths. MassLIFT, which trains emerging conservationists and places them in temporary positions at host organizations, was initially part of Mount Grace, but became its own entity in 2018, when it was spun off by the trust as TerraCorps. Today, Mount Grace's work is still assisted by a TerraCorps land stewardship coordinator and a regional conservation coordinator. The program serves the dual purpose of expanding the capacity of lower-resourced land trusts and building the next generation of conservationists.

In a parallel process also responding to the need to support municipal volunteer boards and help them professionalize their work, the NQRLP, supported by MassLIFT, launched the first Massachusetts Open Space Conference in 2011. The conference helped to bring together volunteers from the Commonwealth's 351 municipalities to build their skills and knowledge base. Subsequent annual conferences grew out of research at UMass (a longtime collaborator with the NQRLP) demonstrating the power and reach of peer-to-peer networks. The partners saw untapped potential in local open space committees and similar conservation-related town boards, whose members are naturally likely to be known and trusted—friends, neighbors, and advisors in their own communities. Creating a conference to amplify their experiences, build their knowledge base, and foster opportunities for networking beyond town boundaries, Mount Grace helped create a statewide networks of conservation ambassadors who have gone on to initiate and support numerous conservation projects.

### *Diversifying partnership and outreach*

As a leader in land-justice work and the first land trust in the state to create a full-time position to increase its capacity for this work, Mount Grace has been paving the way for others to do the same. In collaboration with its Indigenous partners, the organization is creating its Land Access toolkit to lay out a framework for engaging with Indigenous Tribes. It is also beginning to build a coalition of land trusts to work together to spread awareness and competency surrounding land justice. Currently, the two-member partnership is working with representatives from the Nipmuc Tribe (alternately spelled Nipmuk) to develop funding and protocols for work with Indigenous communities. The goal of the coalition is to increase Indigenous land access, integrate traditional knowledge into partners' stewardship, and increase Tribal capacity to engage with land trusts, thus guiding in a new era of land management that is more inclusive and just.

Mount Grace is also launching a yearlong pilot project that will fund the work of a Nipmuc cultural steward who will work alongside the Mount Grace land steward. The program is meant to increase the number of cultural stewards and the capacity of the Nipmuc tribe to work with multiple land trusts. In addition, Mount Grace plans to develop educational materials to guide peer organizations in understanding the importance of including Indigenous communities in their work.

### *Software development and utilization*

New technologies are streamlining some of the most time-consuming activities of conservationists and, despite adding upfront work, Mount Grace is leaning into these tools to increase its long-term capacity. Mount Grace is in the initial stages of developing its own protocols for Upstream Tech Lens, a remote monitoring tool that streamlines the staff's work on the ground stewardship efforts. The protocol will include frequent communication with representatives from the software company to enable smooth integration of the software into Mount Grace's monitoring system. Stewardship staff are also part of a learning cohort at the Land Trust Alliance. Members of the cohort are working together to learn the software and inform the LTA as they develop protocols around remote monitoring requirements. Mount Grace is creating tutorials to fill in gaps in existing training material and is writing a step-by-step guide to help train future staff, AmeriCorps members, and volunteers. While the process is lengthy, it will save Mount Grace time and resources in the long run, as remote monitoring has the potential to reduce the time it takes to monitor a property by two thirds.

Solutions to other challenges are being disseminated through tools such as: solar siting maps and guides, which present information that will empower municipalities to make informed decisions about solar installations with regard to environmental impact; and strategic conservation maps, which identify high-impact conservation areas.

### *Lessons from Mount Grace's collaborative methods*

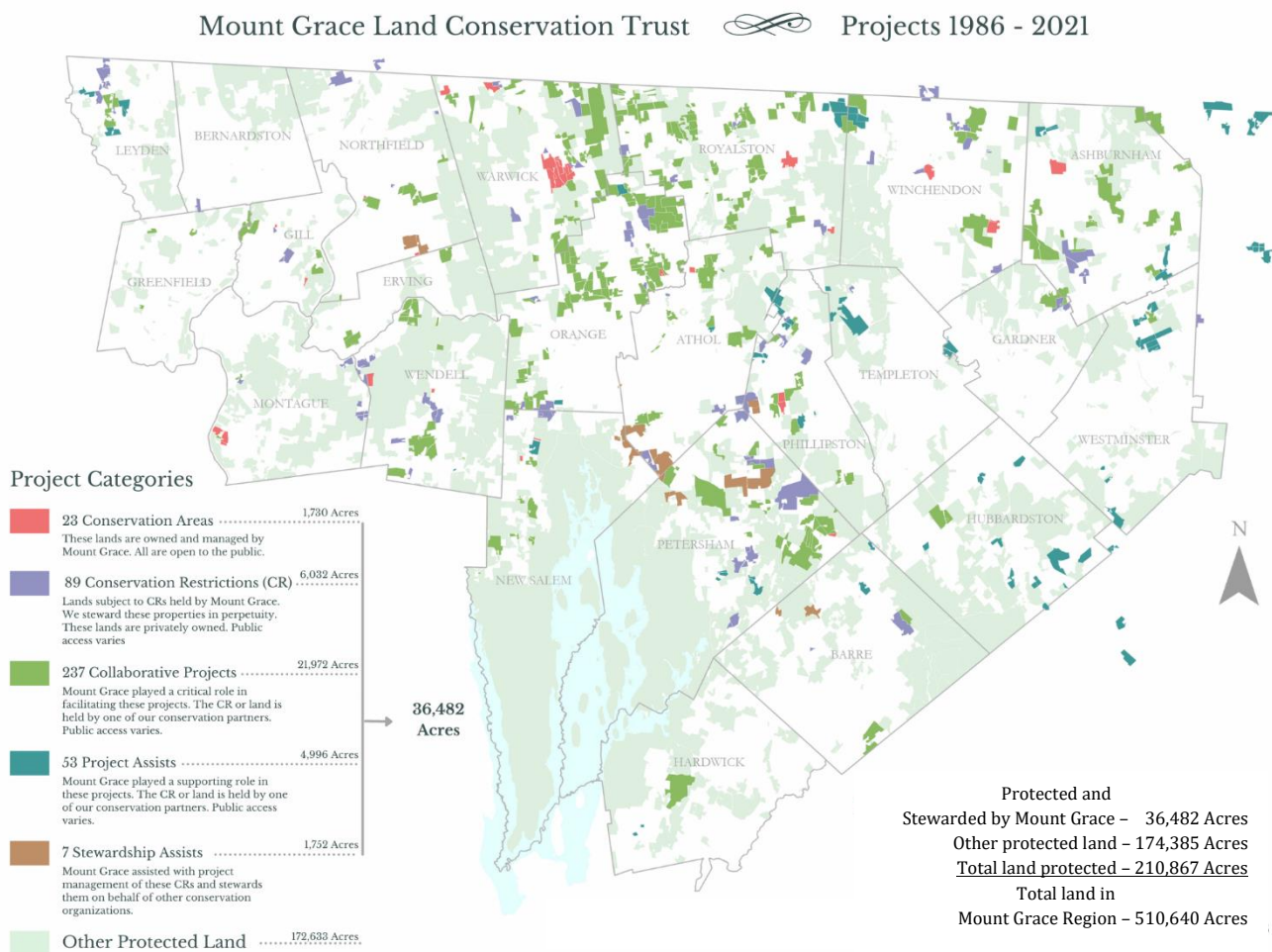
Conservationists strive to maximize the impact of limited resources. When opportunities arise, land trusts must act quickly and efficiently to capture and protect land. Mount Grace envisioned a formal regional partnership that would not only keep trusts from stepping on each other's toes but would allow them to work together to share knowledge and resources and achieve more together. The NQRLP actualized this vision and the partnership has served as an integral piece of infrastructure for Mount Grace and its peers for over two decades.

After reports illustrated gaps in administrative capacity among Massachusetts' smaller, mainly volunteer land trusts, Mount Grace established MassLIFT. The in-house program, now an independent entity renamed TerraCorps, serves the dual purpose of training the next generation of conservationists and providing land trusts with additional program capacity. It has also been leveraging and developing emerging technologies to streamline and share its work with other organizations in the region.

Recently, Mount Grace has been focusing on building Indigenous partnerships to incorporate traditional knowledge and interests in its stewardship and management plans through contracts with cultural stewards from the Nipmuc Tribe. Mount Grace and the Nipmuc are also working to promote similar partnerships and knowledge sharing among land trusts and tribes.

## Stewardship expertise

Purchasing a piece of land is only the first step in its conservation. More important than capturing rights to that parcel is using, managing, and caring for it responsibly in perpetuity. The process requires a high level of accountability to ensure that protected land is treated and maintained in the way its stewards pledged. Mount Grace has since its founding dedicated significant resources to oversight and transparency measures that ensure its land serves its intended purpose. It has been eager to adopt new technologies that streamline this process and, more recently, has been working to diversify its stewardship staff and practices to better serve BIPOC communities who have historically been excluded from and disenfranchised by conservation activities.



*Figure 4: As of 2021, Land protected by all organizations and sectors formed a complementary mosaic representing more than 40% of the landscape in the Mount Grace region (Source: Annual Report 2021)*

A significant part of stewardship is understanding the context of protected lands surrounding a given parcel. From the organization’s inception, its managers have been aware of the status of and potential for large-scale conservation in the North Quabbin region and beyond. As of 2021, Mount Grace and the various public, private, non-profit, and academic partners working in the North Quabbin had protected more than 210,000 acres of land within the 510,640-acre territory of the “Mount Grace Region” (see Figure 4). That number represents over 40 percent of the region, a remarkable feat for the eastern United States. Since the map was produced last year, Mount Grace alone has protected an additional 1,038 acres.

### *Creating a framework for stewardship*



*Mount Grace stewardship committee members and TerraCorps steward discuss a possible re-route at Fox Valley Wildlife Sanctuary in Phillipston*

Mount Grace’s first stewardship manager was a part-time staff member responsible for overseeing 16 conservation areas and 30 easements, stretching over 3,434 acres, and each requiring annual monitoring. Mount Grace recognized that the job description didn’t quite match the scope of the work and, in 2006, it expanded the position from part-time to full-time. Still, there was an excess of work to be done. Staff had fallen behind on trail maintenance, invasive species removal, and tree plantings. To support the work of Stewardship Biologist Tom Wansleben, Mount Grace formed a stewardship team, responsible for managing Mount Grace property.<sup>28</sup> The team put out regular calls for volunteer assistance and hosted events

to mobilize community engagement. To ensure consistent oversight of its land, Mount Grace upgraded and further standardized its monitoring program and stewardship templates.

Staff use baseline reports to document the conservation value of an easement when it is established, providing a point of reference for future stewardship visits. Mount Grace created its own template for these reports, which is more detailed than that provided by the state. Mount Grace’s template includes a larger array of site maps and natural history details that facilitate long-term protection of the easement values.

Many of Mount Grace’s stewardship policies and procedures are guided by the LTA’s “Accreditation Standards and Practices”,<sup>29</sup> which provides clear guidance for thorough monitoring and management of properties and easements. As an LTA accredited land trust, Mount Grace’s stewardship practices are also overseen by an external commission (see Box 4). As noted above, the initial accreditation process, as well as renewal, requires applicants to report

any violations of easements and detail their resolution. Mount Grace was initially accredited in 2013. It renewed its seal in 2018 and is in the process of renewing it again for 2023.

### *Growing the stewardship team and leveraging technology*

As the breadth of its conserved land increased, Mount Grace responded by dedicating additional staff. In 2021, it added a climate and land justice specialist and conservation stewardship associate to assist the stewardship manager and TerraCorps steward with monitoring and grant writing. The stewardship committee (described in Box 1: Mount Grace Board Structure), was recently split into two committees, one focusing on trail and sign building and maintenance and the other slated to advise staff in setting and prioritizing goals for fee properties. Volunteer work and TerraCorps service is also integral to Mount Grace's stewardship capacity, drawing on community knowledge and resources through continuous engagement with the NQRLP.

By the end of 2022, Mount Grace will own 28 properties and hold over 100 conservation easements. Luckily, emerging technology is streamlining the property-oversight process, allowing Mount Grace to stay on top of stewardship without significantly increasing its staff.

In 2019, staff began learning to use Landscape Conservation, a software that uses Global Positioning Satellite (GPS) to track monitoring visits. Photos and notes taken on these visits are automatically matched with the location they are taken at, and the software generates a report with all the information that would otherwise need to be manually pieced together.

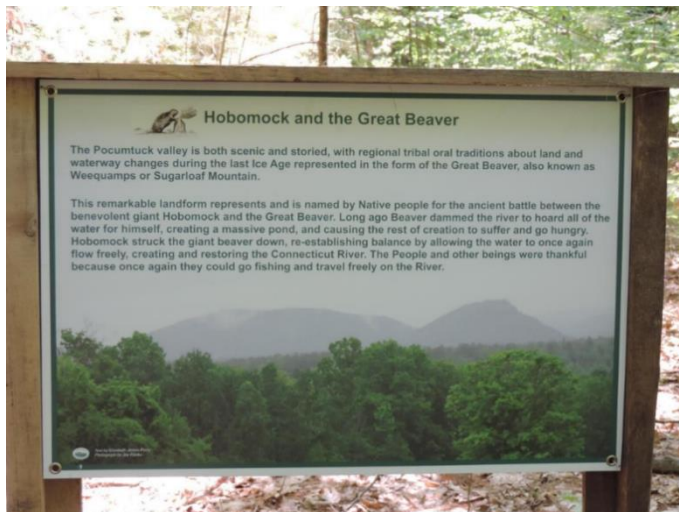
In 2022, Mount Grace phased in a new satellite-imagery software called Lens from the company Upstream Tech. This tool allows staff to monitor properties remotely using commercial satellite imagery. It has the dual benefit of freeing up staff time and cutting the carbon emissions of Mount Grace's monitoring program significantly by eliminating most of its travel to and from properties. With Lens, staff can monitor the entirety of multiple properties in a single day. In the past, stewards were only able to visit a portion of one to two parcels in the same amount of time.

The technology will also help Mount Grace better understand landscape-level climate impacts by answering broad, ecological questions about hydrological changes and forest health and regeneration.

The inclusion of Traditional Ecological Knowledge (TEK) in the design of Mount Grace management plans is another important advancement for the land trust. Staff are incorporating TEK input from the Nipmuc Tribe in monitoring reports and stewardship decisions to maximize the health, resilience, and connection to the land for all communities.

## Community outreach and inclusion

As the team leans into technologies that increase the efficiency of stewardship work, it is using newfound time to foster stronger relationships with landowners. Almost half of Mount Grace's conservation easements have changed ownership or are in the process of changing ownership. New owners don't always share the same values as those who granted the original easement, and it is important for Mount Grace to clearly communicate the terms of the land. It spends time welcoming new landowners to the community, discussing what their easement means, and outlining the extent of Mount Grace's involvement in management, decision making, resources, and support.



*Signage along the Gunnery Sergeant Jeffrey S. Ames Accessible Nature Trail at Mount Grace's Alderbrook Meadows Wildlife Sanctuary in Northfield discusses the natural environment, Indigenous heritage and culture, and colonial land use.*

Mount Grace has also been adapting stewardship practices to embrace and include a greater swath of the community. Recently it has been working with Indigenous partners to incorporate their knowledge and interests in the stewardship and management plans for Mount Grace properties. It contracts a Nipmuc cultural steward to inventory plants, animals, and physical features on properties so that stewardship plans can account for and emphasize cultural benefits in addition to ecosystem benefits. Indigenous partners are also aiding Mount Grace as it revises its forest management plans to include the needs of Indigenous communities.

Mount Grace has further expanded the communities it serves by creating accessible trail systems on two of its properties. The Alderbrook Meadows Wildlife Sanctuary in Northfield has a wheelchair accessible trail that loops through a grove of white pines and past a hidden pond.<sup>30</sup> Four Indigenous tribes were involved in the Alderbrook project, which was guided partly by the need to recognize the history of the land and respect its cultural value while constructing the trail system and signage.

## Responding to climate change

Climate change is another source of pressure that has spurred Mount Grace to evolve its stewardship strategies. Temperature and rainfall changes are resulting in increased invasive species, decreasing the resiliency of native species, and causing additional storm damage to forests.<sup>31</sup> Mount Grace's climate and land justice specialist has been key to its response by increasing its capacity to write grants that target climate mitigation work. The position is further



supported by a newly created climate sub-committee and a climate action plan that lays out Mount Grace's organizational strategy for this work.

Specific actions Mount Grace has been taking in concert with its licensed forester to evolve its forest management plans and stewardship monitoring protocols to better deal with climate impacts include:

- Opening forests to give trees more space and resources to withstand invasive pressure without further encouraging invasive plant growth,
- Carefully choosing the location of logging roads to reduce the spread of invasive plants,
- Expanding blowdown areas with limited harvests to create early successional habitat and a more diverse stand structure to increase forest resilience,
- Incorporating carbon sequestration in management decisions,
- Working to promote better invasive species monitoring,
- Communicating with landowners regarding invasive species management, and
- Leveraging remote monitoring technology to monitor landscape-level ecological changes, indicated by fluctuations in photosynthesis, seasonal leaf cover, and surface hydrology.

### *Lessons from Mount Grace's stewardship practices*

Mount Grace's stewardship team started small, with one part-time staff member. Since then, it has added staff capacity and reoriented the tasks and responsibilities of this team. Today, it employs a full-time stewardship manager whose work is supplemented by a TerraCorps steward, volunteer stewardship committee, and the Climate and Land Justice Specialist staff position, which supports both stewardship and land conservation. Mount Grace is also consistently cultivating volunteer and community engagement to aid in stewardship work.

Emerging technologies that utilize GPS and satellite imagery to allow for remote monitoring and efficient recordkeeping have also streamlined Mount Grace's property oversight. This has opened up staff capacity to foster landowner relations, which is especially important as land changes hands and new owners bring in different values and levels of understanding regarding their property's easement.





*Climate and Land Justice Specialist Jenn Albertine with her Siberian Husky dog team. The sport of dogsledding has been forced to adapt to changing weather patterns in the face of climate change.*

In recent years, Mount Grace has augmented its response to urgent cultural and climate crises. Key to this work has been the addition of a climate and land justice specialist and an Indigenous cultural steward working on a contract basis. These two new positions are aimed at incorporating Indigenous knowledge and interests and climate-change implications into Mount Grace’s stewardship and management plans, as well as broadening the definition and practice of land protection. At the same time, Mount Grace remains committed to reducing barriers for all local landowners to protect and steward their land through building relationships across the whole North Quabbin community. The integration of these critical topics and positions enhances Mount Grace’s position as a regional land trust capable of contributing to the protection of a

mosaic of lands. Mount Grace is now prepared to embrace a fuller spectrum of community needs and conservation values.

## Cross-cultural competence

Mount Grace protects land with people rather than from people. Its work is not simply to set aside natural spaces but to ensure that those spaces are used to maximize well-being and sustainability among those who live in and around them. People and communities are the pillars of Mount Grace’s work and many of its activities focus on creating systems that connect people with the resources they need to thrive. Recently, it has been reevaluating who it serves and the space it inhabits in the timeline of the historically inequitable field of land conservation.

As an organization, Mount Grace is asking, “Who are we protecting land for and why? Who is benefitting from our work and what are we perpetuating?” From this dialogue, it has become clear that land justice must stand as a major part of its work. In recent years, it has shifted to be more inclusive and center the needs of Black, Indigenous, and People of Color (BIPOC) communities, who have historically been excluded from the conservation movement and land ownership.<sup>32</sup> Its journey has been fruitful but challenging. Mount Grace recognizes that there is no finish line for this work; it will be continuous and nonlinear with the goal of ushering in a new era of conservation, in which equity and justice are no longer novel.

### *Community Conservation and Indigenous Partnership*

In 2014, landowners approached Mount Grace with a ~150-acre parcel surrounding a beaver pond in Northfield. Mount Grace had a grant from the Department of Conservation and Recreation that could fund a project to protect the area, but it required public access on the land. The landowners were interested in creating an accessible trail to honor their son, a military veteran. Due to concerns about the harm the original excavation and construction plan might cause to the land's cultural value for Indigenous people, Mount Grace reached out to four Indigenous tribal partners to help create a plan for constructing the trail that would minimize the negative impacts to the land as a cultural resource.

As a result of the consultation, the route was altered and the trails, benches, and observation platform planned for the site were all installed above grade to eliminate unnecessary digging. The collaboration progressed and the Indigenous partners worked with the Northfield Historical Commission and landowners to produce signs describing the cultural, historical, and natural values of the land. After the trail opened, Mount Grace land steward, KimLynn Nguyen, continued working with the Indigenous partners to extend the collaboration for work on other Mount Grace land.

This was the beginning of a deeper commitment to diversity, equity, inclusion, and justice (DEIJ) at Mount Grace. The land trust was recognizing an urgent need to uplift all people, specifically those who had been historically excluded from land conservation benefits. Part of this meant increasing representation within the organization. Mount Grace made a commitment to ensure that BIPOC stakeholders held some of its board seats. DEIJ training began for its staff. The transition has been difficult. Early in the process some participants struggled to embrace an inclusive lens but came to see the discomfort as proof that the work was productive and should continue.

Mount Grace also recognizes that its journey toward better cultural practices is gradual and nonlinear. In 2019, Mount Grace invited a tribal partner to conduct a cultural survey of the land surrounding its headquarters. At the time of its completion, several community members raised concerns about the accuracy and integrity of a non-Indigenous person's presentation on Indigenous cultural knowledge. Despite the resources that had already gone into it, Mount Grace chose not to publish the report to avoid further harm to Indigenous communities.

### *Facing history and embracing Indigenous knowledge*

Further proof of the gap in knowledge and recognition surrounding historical land-use patterns came in 2021, when a team of Yale graduate students approached Mount Grace. The students were investigating how the dominance of white stakeholders—from landowners, to conservationists, to grant funders—created a system of “land wrongs,” or patterns of land use and management that disrespected and disenfranchised Indigenous people.<sup>33</sup> White people own nearly 100 percent of the farmland in the Mount Grace region.<sup>34,35,36,37</sup> The students were interested in unpacking the centuries of policies and practices favoring white land ownership that created this reality.

Mount Grace's board agreed to allow the students to center the organization as a focal point for their story. The project helped to uncover some of the policies and practices that historically disenfranchised BIPOC communities of land rights, but the study also unearthed new questions and emphasized the need for ongoing work and attention to these issues. Mount Grace pursued this work by adding a full-time position for a climate and land justice specialist. The staff member supports work to create or adapt policies to better promote BIPOC farmland access, fosters a healthy partnership with the Nipmuc, and identifies farms in transition that could be held for BIPOC farmers. As part of this, Mount Grace is now working with a local farm education nonprofit to partner land trust staff with farmers and farm educators of color to develop new, more equitable, land tenure practices to remove barriers to BIPOC land ownership.

In developing these policies, Mount Grace has embraced the understanding that Indigenous people managed land in the Northeast sustainably for thousands of years before Europeans arrived.<sup>38,39,40</sup> Colonization brought violence, forced Indigenous people off their land, and led to a period of intense tree harvesting that drastically changed the landscape.<sup>41,42,43</sup> Since then, the environment has suffered degradation that is only increasing in severity as climate change worsens. Indigenous people are most affected by climate change, as their cultures are interwoven with the natural environment and built on respect for the earth.<sup>44,45,46,47</sup> As such, Mount Grace has made it a key objective to integrate the voices of Indigenous people in its stewardship and management practices and to work to increase land access.



*Fred Freeman with Mount Grace staff surveying the Huppert Conservation Area in Petersham, MA in 2021.*

Recently, it brought in Fred Freeman, the chairperson of Nipmuk Cultural Preservation Inc. to help create a cultural respect and use agreement. Mount Grace sent out maps of all its land to Indigenous partners, asking if any of the areas were of particular interest. The Huppert Conservation Area, a 20-acre parcel in Petersham, was attractive to the Nipmuc Tribe, so Mount Grace wrote and signed a memorandum of understanding giving the Nipmuc people expanded land-use rights. The Nipmuc Tribe can camp, close the area to the public during ceremonial use, and gather medicinal plants on the property, activities that are not open to the general public. Mount Grace framed the document's signing as the start of a dialogue, rather than a high-profile accomplishment.

In the spirit of continuous partnership and inclusion, Mount Grace launched a pilot project that partners with Nipmuc cultural steward, Andre Strongbearheart Gaines, Jr. He is contracted to help inform Mount Grace's forest management and stewardship plans to reflect Indigenous knowledge and interests.

Mount Grace gains significant value from its Indigenous partners, but its model for collaboration is meant to be mutually uplifting. As such, it ensures that partners' pay is fair and commensurate with experience. To fund its contract positions Mount Grace writes line items into grants specifically for paying stipends to Indigenous partners. Funding for this work has come from the LTA Land and Climate Grant Program, a local racial-equity grant from the Community Foundation of North Central Massachusetts, and from an anonymous reparations donor who matches grants with the restriction that funds be used to pay Indigenous partners. Going forward, Mount Grace hopes that its emerging conservation coalition will help attract funding for and expand Indigenous partnerships in the region.

### *Responding to the socioeconomic status of the region*

Central to Mount Grace's justice lens is the knowledge that some of the resources that sustain the region today are available at the expense of prior generations of landowners. The Quabbin Reservoir, which provides drinking water for much of the Boston area, was created by flooding four communities and displacing over 2,500 people. The core of the Mount Grace Region has also suffered economically as the mills and industry that originally sustained many local communities declined. Conservation and strategic, intentional land use is one way that Mount Grace is accommodating and raising up disadvantaged communities.

Much of Mount Grace's land is conserved farmland and it has been working to find systems for managing these parcels that reduce barriers of entry into farming. In 2012, Mount Grace launched the Campaign for Affordable Farms to protect "whole farms." While many farms had been protected in the region, the standard Massachusetts agricultural easement separates the farmland from the farm infrastructure. Mount Grace wanted to connect the land with the farmhouse, the barn, and other necessary farm buildings. Bringing barns and residences under the coverage of a "whole farm" easement makes it possible to guarantee that the farmhouse will continue to be used by a farmer and cannot be sold separately at market value.

They first experimented with a ground lease model, in which Sarah and Ryan Voiland, the farmers of Red Fire Farm in Montague, own all the buildings and lease the land from Mount Grace in an inheritable 99-year lease. Lease payments are deliberately set to cover basic costs like property taxes. Mount Grace owns the house lot and the farmland, which is also protected with a state agricultural easement.

Since that initial project, Mount Grace has turned toward employing an option-to-purchase model, in which the farmers agree to sell their farm (comprised of the protected farmland and all the buildings) to a farmer, and only for an agricultural rate. If they propose something else, Mount Grace has the legal right to step in and buy the farm at its agricultural value. This model keeps farms more affordable for future generations of farmers. So far, one farm (Sunset View

Farm in Winchendon) has been successfully transferred using the option-to-purchase model. Mount Grace continues to refine this and other whole farm viability strategies.



*Farmers Chuck and Livvy Tarleton retired in 2022 after working with Mount Grace to protect Sunset View Farm. Mount Grace then helped the Tarletons transfer the Winchendon farm to new farmers at its agricultural value.*

As Mount Grace considered the complex relationship between people and land, it identified a gap in the region’s farming infrastructure. The North Quabbin region is rich in small farms lacking consistent markets for their products. Meanwhile, some communities in the area are considered food deserts, or places where there is insufficient access to fresh food. In 2014, Mount Grace purchased a former bank building in downtown Orange in order to support the growing North Quabbin Community Co-op. Mount

Grace and the co-op converted the building into the Quabbin Harvest Food Market, a food co-op meant to enable the flow of goods between local farmers and community members. Each year, the market takes in and sells \$250,000 worth of local produce, functioning as a much-needed aorta between producers and consumers.

### *Tackling climate change through strategic land conservation*

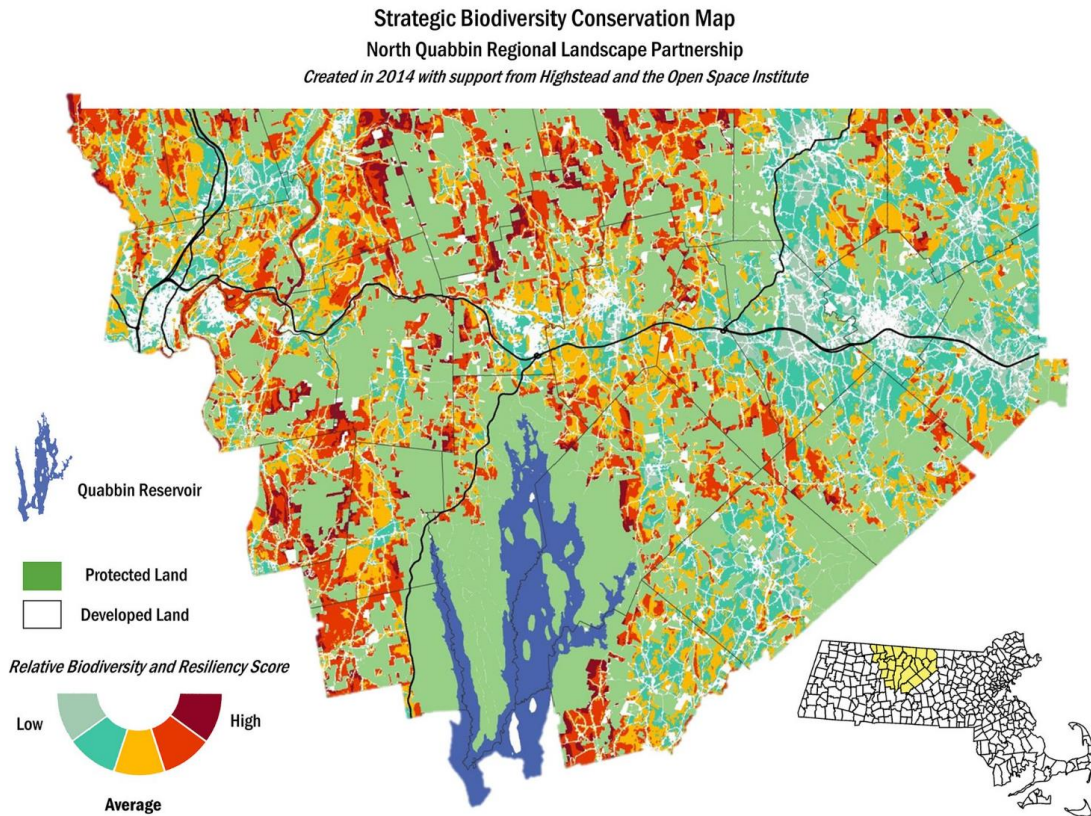
Protecting land and committing to responsible use and management are integral to both staving off further climate damage and responding to existing issues. Mount Grace holds up land protection as the primary defense against a changing climate and has been working to develop a framework to guide its activities.

In 2014, the NQRLP used a grant from the Open Space Institute and the Highstead Foundation to develop a climate change-informed strategic map. It combined newly released data from the Nature Conservancy with existing data from the Commonwealth to map the expected resiliency of biodiversity by area. The tool helps Mount Grace and its partners determine the urgency of projects based on their climate-resiliency and mitigation potential.

Mount Grace’s most recent climate plans are fueled by \$11,000 from the Land Trust Alliance Climate and Land Grant Program. The award is meant to help Mount Grace develop a climate action plan. For the project, Mount Grace will (1) work with Indigenous partners to develop a forest management plan to maximize carbon sequestration; (2) identify and quantify climate impacts on Mount Grace land; (3) evaluate and reduce Mount Grace’s carbon footprint; (4)



adapt climate education curriculum and communications; (5) identify new parcels with the potential to bolster regional climate resiliency; (6) and conduct outreach to towns offering assistance with climate mitigation and adaptation work.



*Figure 5: With training and assistance from the Open Space Institute and Highstead, Mount Grace composed a Strategic Biodiversity Conservation Map to help guide its land conservation priority setting practices.*

Mount Grace is also working on two ongoing cultural initiatives:

- A cultural survey that contracts a Nipmuc cultural steward to inventory plants, animals, and physical features on properties to be accounted for in management plans; this effort aims to incorporate Indigenous knowledge into how we relate to and steward the land and protect sacred sites from damage, and
- Forest management plans which include input and needs of Indigenous people; this effort could result in managing for and/or harvesting timber species that are important to Indigenous people and giving it to them at no charge and targeted management to improve the health and population of species of interest such as the Atlantic White Cedar.

In addition, Mount Grace is collaborating with partners and lawyers to:

- Develop more inclusive conservation easements,
- Establish additional equitable land-holding policies, such as affordable farmland programs, agrarian commons, and working partnerships with BIPOC land trusts, and
- Navigate land reparations—land return and repatriation—pathways as a land trust, including land for housing opportunities.

### *Lessons from Mount Grace's cultural journey*

Mount Grace has embarked on a journey toward better recognition of the historical context of land conservation, which excluded and disenfranchised BIPOC communities for hundreds of years. In response, it has begun to develop partnerships with Indigenous communities to incorporate traditional knowledge and interests into its stewardship and management plans. To enable this work, Mount Grace staff write line items into its grants and leverage targeted funds to ensure that Indigenous contractors are paid fair and commensurate wages. It is also working to encourage other land trusts to adopt similar practices and is in the beginning stages of developing a regional coalition to facilitate that process.

People and communities are central to Mount Grace's work and several of its initiatives focus on connecting people with the resources they need to thrive. Many of Mount Grace's properties are working farms, but these farms are small and often lack access to markets. To break down barriers of entry to farming and promote the circulation of farm products between local farmers and food-insecure communities, it established the whole-farm model and worked to launch the Quabbin Harvest Food Market.

Climate change is also increasing the urgency of conservation work across the nation and Mount Grace sees land protection and responsible land management as the primary defenses against these threats. Its climate-change informed strategic map helps Mount Grace and peer organizations prioritize the most urgent project areas using projected resiliency and biodiversity data.

This work has been challenging and nonlinear. Along the way, Mount Grace has grappled with internal and external resistance, missteps, and setbacks, but is embracing the continuous nature of this work and the emerging partnerships that bolster its organizational strength and integrity.



## Conclusion

Mount Grace's story is the narrative of a community that coalesced around a shared connection to the land that sustains it. Though it started with very few financial resources, that community leveraged creativity and ambition to stimulate a movement and it has sustained enthusiasm for a mission that grows in urgency and scope each year.

What began as an all-hands-on-deck volunteer effort to save an important natural resource grew over time. Once it had the capacity, Mount Grace took on its first full-time employee, Keith Ross. Today, it has a staff of over a dozen full-time and TerraCorps members. It leans into a robust regional network to share resources and expertise, and regularly brings in volunteers to support on-the-ground efforts.

Mount Grace's initial \$13 bank account ballooned to over \$4 million in net assets and retained earnings by 2021,<sup>48</sup> and it has developed and shared budgeting tools and strategies to streamline financial processes. Its staff is adept at attracting federal funding, having successfully competed for several federal FLP grants and directly participated in more LPP-funded efforts than any other land trust in the state. Fundraising is a shared responsibility for much of Mount Grace's staff and board members, as consistent and diverse income streams are integral to its nimbleness and reliability.

Partnership and knowledge sharing are cornerstones of Mount Grace's mission and have been key to its success, especially when pursuing large landscape-scale projects. One of its early accomplishments was the formation of the NQRLP, a voluntary network of regional land trusts that pool resources and stand on each other's shoulders to reach high-hanging fruit. It also founded the organization known today as TerraCorps, which has added capacity to many of the NQRLP's partner organizations and fostered the next generation of conservationists.

Since its inception, Mount Grace has prioritized transparency and accountability. Land stewardship is just as important—if not more so—than land acquisition and Mount Grace has harnessed the power of technology and innovation to streamline its stewardship practices.

Intertwined in all its work, is a deep commitment to learning, acknowledging, and responding to the inequitable history of land conservation. Some of its most important recent initiatives have not been in acquiring land, but in forming new and inclusive networks that return rights and autonomy to Indigenous people whose land and culture has been harmed by more than a century of conservation activity.

Mount Grace has been striving to represent a greater diversity of people in its work and to continue to question its past, present, and future practices to better itself and its community. While it may serve as a model to others, it is on its own self-improvement journey as well and is working continuously to evolve and meet the changing needs of the people and society it serves.

Mount Grace's story is one of robust people power. It is an impressive tale of growth. But it is not quixotic, nor should it be seen as a one-size-fits-all mold for others to copy. Instead, its

performance and innovativeness should be used as a framework to inspire others to explore what is possible, think deeply about what is right, and build an organization that most effectively furthers their land trust's mission.

## Appendix A.

In 1995, Mount Grace published its first annual report, outlining its first decade in operation. At the time it was still operating on a budget (total expenses) of less than \$100,000 a year but was bringing in significant support from its activities and donors and its financial acumen was growing steadily. (Source: Mount Grace Annual Report 1997)

# STATEMENT OF FINANCIAL POSITION

## JUNE 1, 1995 - MAY 31, 1996

### ASSETS

#### Current Assets

|  |           |
|--|-----------|
| Cash .....                                 | \$147,420 |
| Accounts Receivable .....                  | 5,406     |
| Accounts Receivable - Escrowed Funds ..... | 66,477    |
| Prepaid Expense .....                      | 61        |
| Investments .....                          | 28,804    |
| Land Held for Transfer .....               | 310,016   |
| Total Current Assets .....                 | 558,184   |

|   |                    |
|---|--------------------|
| Land, Building & Equipment (Net) .....    | 37,124             |
| Note Receivable .....                     | 9,858              |
| Deposits .....                            | 300                |
| Investment - Petersham Country Club ..... | 150,250            |
| Land Held for Conservation Purposes ..... | 283,903            |
| <b>Total Assets .....</b>                 | <b>\$1,039,619</b> |

### LIABILITIES AND NET ASSETS

#### Current Liabilities

|                                       |           |
|---------------------------------------|-----------|
| Accounts Payable .....                | \$2,165   |
| Accrued Interest Expense .....        | 11,905    |
| Notes Payable .....                   | 149,300   |
| Payroll Withholding .....             | 288       |
| Land to be Transferred to State ..... | 15,000    |
| Deferred Revenue .....                | 2,900     |
| Contingent Liability .....            | 150,250   |
| Total Current Liability .....         | \$331,808 |

#### Net Assets

|  |           |
|--|-----------|
| <b>Unrestricted Net Assets</b>                       |           |
| Undesignated .....                                   | \$283,388 |
| Board Designated - Conservation Leverage .....       | 18,249    |
| Board Designated - Eleanor Whitmore .....            | 136,533   |
| Board Designated - Land & Building Maintenance ..... | 17,000    |
| Temporarily Restricted Net Assets .....              | 12,046    |
| Permanently Restricted Net Assets .....              | 240,595   |
| Total Net Assets .....                               | 707,811   |

|   |                    |
|---|--------------------|
| <b>Total Liabilities and Net Assets .....</b> | <b>\$1,039,619</b> |
|---|--------------------|



### SUPPORT AND REVENUE

|   |          |
|---|----------|
| Contributions .....                               | \$53,339 |
| Grants .....                                      | 34,645   |
| Conservation Planning Services .....              | 3,820    |
| Net Proceeds from Transfer of Land and CR's ..... | 331      |
| Other Income .....                                | 1,682    |
| Investment Income .....                           | 14,384   |

|  |                  |
|--|------------------|
| <b>Total Support and Revenue .....</b> | <b>\$108,201</b> |
|--|------------------|

### EXPENSES

|                        |          |
|------------------------|----------|
| Program Services ..... | \$54,876 |
| Operating .....        | 12,136   |
| Fundraising .....      | 7,058    |

|                             |                 |
|-----------------------------|-----------------|
| <b>Total Expenses .....</b> | <b>\$74,070</b> |
|-----------------------------|-----------------|

|                                   |                 |
|-----------------------------------|-----------------|
| <b>Change in Net Assets .....</b> | <b>\$34,131</b> |
|-----------------------------------|-----------------|

*\*Value of land purchased and sold not reflected in above figures.*

#### Staff:

Leigh Youngblood, *Director of Land Protection*  
 Cynthia Wood, *Office and Land Manager*

#### Legal Counsel:

David S. Singer, Esq.

#### Accountant:

Richard Abbott, CPA, MST

## Appendix B.

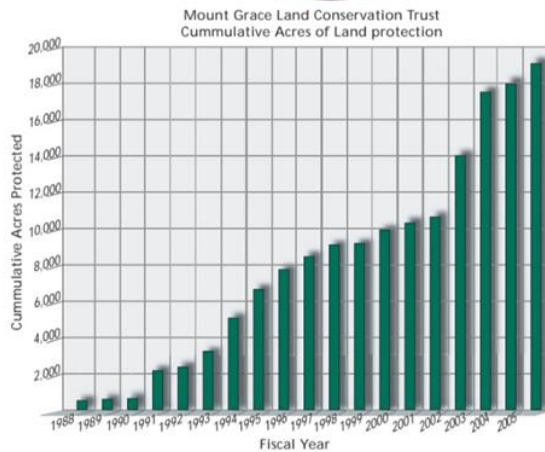
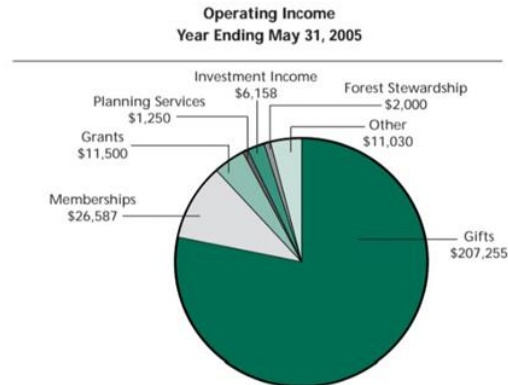
Almost 20 years into its existence, Mount Grace’s financial need and capacity had both grown exponentially. It had also gone from less than 1,000 protected acres to over 19,000, as shown in the bottom right corner. (Source: Mount Grace Annual Report 2005)

### Preliminary Financial Summary *for the Year Ending May 31, 2005*

| Statement of Activities              | FY05             | FY04             |
|--------------------------------------|------------------|------------------|
| <b>Operating Support and Revenue</b> |                  |                  |
| Gifts                                | \$207,255        | \$121,670        |
| Memberships                          | \$26,587         | \$25,610         |
| Grants                               | \$11,500         | \$40,900         |
| Planning Services                    | \$1,250          | \$8,143          |
| Investment Income                    | \$6,158          | \$4,574          |
| Forest Stewardship                   | \$2,000          | \$19,227         |
| Other                                | \$11,030         | \$9,945          |
| <b>Total Support and Revenue</b>     | <b>\$265,780</b> | <b>\$230,069</b> |
| <b>Expenses</b>                      |                  |                  |
| Personnel                            | \$187,824        | \$158,121        |
| Contract Labor                       | \$17,803         | \$338            |
| Professional Fees                    | \$15,213         | \$13,246         |
| Office                               | \$34,100         | \$33,259         |
| Stewardship & Land Maintenance       | \$7,525          | \$23,040         |
| Other                                | \$2,805          | \$0              |
| <b>Total Expenses</b>                | <b>\$265,270</b> | <b>\$228,004</b> |
| Net Operating Income                 | \$510            | \$2,065          |
| Unrealized Gain                      | \$2,847          | \$11,743         |

| Statement of Financial Position       | FY05               | FY04 (corrected)   |
|---------------------------------------|--------------------|--------------------|
| Total Current & Long-Term Assets      | \$1,220,414        | \$1,154,716        |
| Conservation Land & Restrictions      | \$828,755          | \$828,756          |
| Buildings & Equipment                 | \$207,279          | \$204,279          |
| Project Asset                         | \$65,122           | 0                  |
| <b>Total Assets</b>                   | <b>\$2,321,570</b> | <b>\$2,187,751</b> |
| Total Current & Long-Term Liabilities | \$409,078          | \$364,038          |
| Total Equity (including land)         | \$1,912,492        | \$1,823,713        |
| <b>Total Liabilities &amp; Equity</b> | <b>\$2,321,570</b> | <b>\$2,187,751</b> |




## Appendix C.

Mount Grace’s most recent annual report, with preliminary results from 2021, shows a robust income stream and financial assets of over \$4 million. Whereas “program services” accounted for over half of Mount Grace’s operating expenses during its first decade, it now spends the greatest proportion of its budget on administrative costs, followed by fundraising – an activity which has been prioritized in recent years. Though it still leans heavily on gifts and membership revenue, it brings in almost twenty times as much in grants as it did in 2005 and its investment income has more than tripled. (Source: Mount Grace Annual Report 2021)

### Preliminary Financial Summary

Year Ending May 31, 2021

| REVENUES                        | FY2021<br>PRELIMINARY         | FY2020            | STATEMENT OF FINANCIAL POSITION   | FY2021<br>PRELIMINARY | FY2020           |
|---------------------------------|-------------------------------|-------------------|---|-----------------------|------------------|
| Gifts & Memberships             | \$ 514,720                    | \$506,997         | Total Current Assets  | \$ 2,373,223          | \$1,283,584      |
| Grants                          | \$ 216,080                    | \$319,358         | Conservation Land & Restrictions  | \$ 1,516,128          | 1,451,078        |
| Program Service Fees            | \$ 0                          | \$ 27,834         | Buildings & Equipment   | \$ 326,792            | 332,782          |
| Investment Income               | \$ 22,939                     | \$ 37,526         | <b>TOTAL</b>  | <b>\$4,216,143</b>    | <b>3,067,444</b> |
| In-kind                         | \$ 5,222                      | \$ 2,425          | Total Current & Long-Term Liabilities   | \$ 180,325            | 272,331          |
| Other                           | \$ 40,173                     | \$ 0              | Total Net Assets & Retained Earnings  | \$4,035,818           | 2,795,113        |
| <b>TOTAL REVENUES</b>           | <b>\$ 799,134</b>             | <b>\$ 894,141</b> | <b>TOTAL LIABILITIES &amp; EQUITY</b>   | <b>\$4,216,143</b>    | <b>3,067,444</b> |
| <b>OPERATING EXPENSES</b>       | <b>FY2021<br/>PRELIMINARY</b> | <b>FY2020</b>     | <div style="display: flex; align-items: center;"> <div style="flex: 1;">  </div> <div style="flex: 2;"> <p>In Fiscal Year 2019, Mount Grace launched <i>The Land Forever</i> campaign. As of the end of Fiscal Year 2021, Mount Grace had raised \$2.4M in gifts, in-kind gifts, pledges, and intentions towards its \$3.5M campaign goal.</p> </div> </div> |                       |                  |
| Landscape Conservation          | \$ 120,422                    | \$183,344         |   |                       |                  |
| Farm Conservation               | \$ 111,718                    | \$113,286         |   |                       |                  |
| Community Conservation          | \$ 52,357                     | \$ 93,380         |   |                       |                  |
| Land Stewardship                | \$ 106,269                    | \$123,125         |   |                       |                  |
| Engagement & Education          | \$ 93,090                     | \$123,273         |   |                       |                  |
| Administration                  | \$ 164,411                    | \$138,802         |   |                       |                  |
| In-kind                         | \$ 5,222                      | \$ 2,425          |   |                       |                  |
| Fundraising                     | \$ 134,478                    | \$108,687         |   |                       |                  |
| <b>TOTAL OPERATING EXPENSES</b> | <b>\$ 787,967</b>             | <b>\$886,322</b>  |   |                       |                  |
|                                 | \$ 11,167                     | \$ 7,819          |   |                       |                  |

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## Endnotes

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