

BLUE HILL HERITAGE TRUST

Community-Based Land Conservation since 1985



FALL/WINTER 2006

BLUE HILL / BROOKLIN / BROOKSVILLE / PENOBSCOT / SEDGWICK / SURRY

Above and Beyond



There is nothing like a bird's-eye view, especially when you are thinking about land conservation. It helps you appreciate what has been accomplished. It also makes clear both the opportunities and the challenges ahead. Being above helps you move beyond.

After 21 years of work, and 84 projects totaling nearly 4700 acres of conserved land, we are assessing how best "to move beyond." That assessment includes time in a small plane looking over our landscape, as well as time spent viewing satellite imagery. It includes time discussing and revising our goals and strategic plan. It includes talking with neighboring land trusts about collaboration, as well as evaluating how we do business against standards and practices promoted by the national Land Trust Alliance. It also includes hearing from our members and residents. In moving forward it is our goal to do the land conservation work that will have the most significant and lasting impact on the long-term well-being of our Peninsula, and to do it well.

But our heads are not just in the clouds, thinking ahead. We continue our work on the ground too. This newsletter provides lots of evidence of that: new projects, new trails, new events, new people, as well as steady attention to the proper care of the places we have protected. Thanks, dear members, for making this all possible!



(TOP) A view of Fourth Pond and Kingdom Woods (center, middle ground) as part of the broader landscape. (CENTER) The beauty of Gold Stream Marsh, a portion of which is protected by the Trust, is striking from 1000 feet up.



From the air, the connection of our Caterpillar Hill land to Walker Pond and Eggemoggin Reach is obvious.



Moonwalk on Blue Hill Mountain, part of our popular Walks & Talks, page 7.

New Land at Kingdom Woods

WHOLE ecological systems are rarely found these days on one parcel of land. The peninsula landscape has been steadily divided over the last 200 years, and still continues to be divided, into many small parcels in separate ownerships, some developed and some not, fragmenting the landscape. The conservation of a natural system may require putting an undeveloped whole back together, parcel by parcel. That is often not possible of course, because key parcels have been developed. But sometimes it is, with a combination of foresight, planning, persistence and luck.

At our **Kingdom Woods Conservation Area**, the possibility of protecting a whole natural system does still exist, and we have been working to put the pieces together since we acquired our first parcel in 1998. Now, thanks to a cooperative landowner, another important piece of this conservation puzzle has fallen into place.

This 42-acre addition was purchased from local businessman Martin Allen, who had used it as a woodlot. It includes much of the headwaters of Carleton Stream, which flows into Fourth Pond, the centerpiece of the Kingdom Woods Conservation Area. It is a key part of the watershed, and includes a six acre marsh, which boasts a prominent and productive osprey nest easily viewed from the Kingdom Road, as well as upland forest.



The new 42-acre addition to Kingdom Woods includes a 6-acre marsh with an osprey nest.

Not only will this land help protect the hydrology of this system and a variety of wildlife habitat, it will also enhance the recreational opportunities that Kingdom Woods provides. The land abuts and is directly across from our parking area and trailhead. It includes a long stretch of wooded undeveloped frontage along the Kingdom Road that will protect the sense of a natural place that one gets gives when arriving for a hike or just passing by.

The land also provides the possibility of a new trail section to the north of the parking area.

The Kingdom Woods Conservation Area began with our purchase of a 320-



acre parcel that included the entire undeveloped shoreline of 50-acre Fourth Pond. This first step was funded by member donations to a special capital campaign. Since then, seven other abutting parcels have now been added through gifts or purchases made possible by acquisition funds donated to our subsequent Peninsula 2000 campaign. This latest purchase used the last of those funds. It brings the size of this block of conserved land, much of a whole natural system, to 829 acres.

Brooksville Students Study Wetlands at Kingdom Woods



Third and fourth graders use our land as a classroom.

One recent fall day, third and fourth grade students in Nada Lepper's class at the Brooksville Elementary School got a first hand look at some of the wetlands they are studying. Led on a field trip by Erika Rowland, our Conservation Lands Manager, the students viewed forested wetlands, vernal pools and a stream/ marsh wetland complex at our Kingdom Woods Conservation Area.

Land Report

As of October 31, 2006

Protected Land

Easements on private land 3143 acres
Land owned by BHHT1532 acres
Total since 1985..... 4675 acres

Land Projects

Conservation Easements 52
Owned (via gift or purchases) 32
Total since 1985 84

New Land Projects

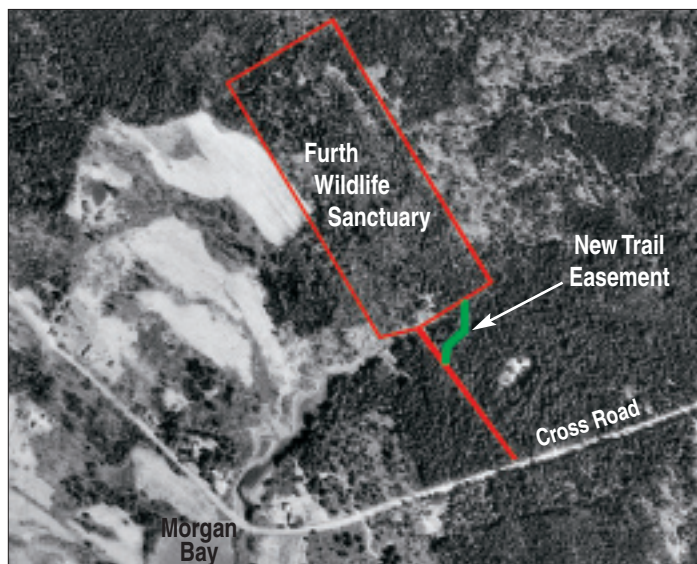
Completed in 2005..... 9

New Trail Easement in Surry

THE GIFT of a trail easement over 450 feet of privately owned land has provided a necessary link in the design of a public walking trail at our **Furth Wildlife Sanctuary** in Surry. Unleashing local volunteer energy, the gift allowed the development of the trail to begin.

We acquired the Furth Wildlife Sanctuary six years ago with the help of our local partner organization, the Friends of Morgan Bay, and with the financial leadership of the late Dr. Eugene Furth. The land is part of the watershed located between the Morgan Bay and Newbury Neck roads that drains into Morgan Bay. It includes a long stretch of Emerton Brook, which flows out of Emerton Heath, a large peatland to the north, as well as a stretch of marsh along its southern boundary.

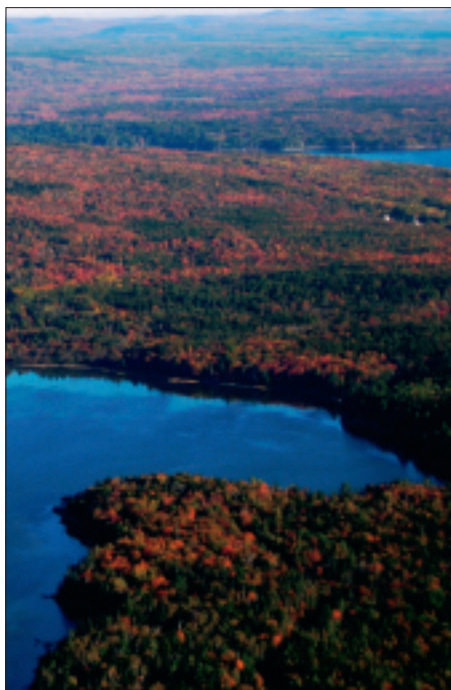
Although primarily intended as a wildlife sanctuary, the conservation goals for the property included plans for a walking trail that would allow the public to enjoy this quiet place. Since no access route appropriate for a trail came with the property initially, those plans were put on hold, but not forgotten. In the 2004 one piece of this puzzle fell into place when Mary Furth, Eugene's wife, donated a corridor of land from the Cross Road to our land. However, because the last stretch of this corridor crossed a marsh, an alternative route around this wetland was also needed.



The green line shows new trail easement to Furth Wildlife Sanctuary.

Susan Hand Shetterly has now provided that necessary final link with her gift of a trail easement across her property.

Trail work, led by the Friends of Morgan Bay, started right away. Next summer, we hope to be able to announce the opening of a new mile-and-a-half loop trail through the Furth Wildlife Sanctuary.



Thanks for the Feedback!

We would like to thank the members who responded to the survey included with the membership renewal letter sent last May. As we revise our strategic plan, the perspective of our members is very useful. (So far, wildlife habitat and undeveloped shorefront top the list of the types of land members say need protection over the next five years.)

If you did not reply to the survey, it is not too late to offer your thoughts.

IRAs and Conservation Easements:

Important Tax Law Changes Create New Incentives

A NEW federal law provides our conservation-minded members and landowners two new incentives, one for gifts of cash from individual retirement accounts, the other for donated conservation easements on land.

IRAs. The new law allows certain taxpayers to make direct charitable gifts from their individual retirement account (IRA) to a charity such as Blue Hill Heritage Trust without income taxation. These gifts are also deductible and not subject to the "percentage of adjusted gross income" limitations imposed on other lifetime gifts. The new law provides for "qualified charitable distributions" of up to \$100,000 per year from IRAs during 2006 and 2007 by taxpayers who are at least 70 years of age at the time of the distribution.

Conservation Easements. A separate section of the new law significantly increases the federal tax incentive for conservation easements donated in 2006 and 2007. The law raises the deduction a land donor can take from 30 per cent of

his or her income to 50 per cent and extends the carry-forward period in which the land donor can take the deduction from 5 to 15 years.

For more information, ask your tax advisor or other qualified financial advisor about the Pension Protection Act of 2006.



White coral mushroom

PHOTO BY SKIP LANG

Blue Hill Heritage Trust

Annual Membership Meeting 2006



On September 6th, rain and clouds gave way to sun just in time for our 21st annual membership meeting. An incredible place, a large crowd, inspirational talks and a rising full moon made the meeting memorable. Hosted by Butch Smith and his staff at the Lookout Inn on Flye Point in Brooklin, approximately 100 members and friends, including many new faces, gathered on the shore of Blue Hill Bay under a large tent (thanks to a September wedding held there a few days before), socialized, did some business, heard reports from

Board members and staff and enjoyed the words of our guest speaker, conservationist and author Alix Hopkins. Many members remained afterwards and continued socializing over dinner. It was a very enjoyable evening. If you were not able to attend, please join us next year.

President of the Board Pam Johnson with guest speaker Alix Hopkins.



President's Report:

Solid Progress Towards a Common Goal

DAYS measurably shorten. Wood smoke spices the air. The decline of the year prompts a different sense of urgency than summer's impulses. We take stock in autumn, but with a sense of commencement and renewal as if still following some primordial school calendar.

Blue Hill Heritage Trust's accomplishments in the past year are notable: nine new land projects; new trails for the use and enjoyment of the public; a diverse and well-attended series of Walks and Talks programs; the continued renovation of our wonderful new office property and its use as a site for educational workshops. The energy and zeal of new board members has buttressed the work of veterans on the Board of Directors. There have been profound discussions of our stan-

dards and practices as we prepare for compliance with national land trust certification. The Board has also given considerable effort to the revision of our strategic plan.

Perhaps the greatest personal satisfaction and pleasure of the past year resides in the talent and hard work of Blue Hill Heritage Trust's staff. The dedication of Executive Director Jim Dow is unparalleled; and we are delighted to have Erika Rowland, employed full-time, taking on more responsibility for lands projects. Skip Lang has joined the staff as well; her dynamism adds much to the office. The staff and our office building itself are resources in which we have invested proudly.

We have many people to thank for Blue Hill Heritage Trust's year of solid progress: the Board, members, contributors and volunteers. Blue Hill Heritage Trust reflects the Peninsula's communities, many people working in different ways towards a laudable common goal.

Looking back, we thank those who have helped Blue Hill Heritage Trust grow in the past twenty-one years, becoming the estimable land trust that we are in 2006. And we look forward to future years of service to our Peninsula with your help and support.

Pam Johnson
President, Board of Directors

2006 Annual Meeting Report

Treasurer's Report

*As presented by John Murphy
at the 2006 Annual Meeting*

I am happy to report that the Blue Hill Heritage Trust's financial condition is very sound, thanks to the contributions of our devoted membership. For fiscal year 2005, ending on December 31, 2005:

■ We met our general operating expenses of approximately \$166,641 with new revenue.

■ The value of our unified Operating Fund/Stewardship Fund, established to help provide annual income to help support our annual operating and stewardship costs, increased to \$690,833.

■ We finished the year with net assets, which includes the book value of conservation lands we own, worth slightly over \$2,920,720, including the value of our new office property at 258 Mountain Road minus the \$78,000 mortgage debt.

■ As is our standard practice, our end of year financial records were reviewed by the outside accounting firm of Loiselle, Goodwin and Hinds.

Our operating budget income goal for 2006 is \$183,500, about 75% of which is budgeted to come from member gifts and small operating grants. Please continue your generous support!



Members enjoyed the chance to socialize at the Annual Meeting.

Alison Dibble Recognized for Her Service

ALISON C. Dibble, whose term on the Board of Directors ended at the 2006 Annual Meeting, was presented a special award at the meeting, recognizing her 15 years of service on the Board, including two years as President. Alison played a key role in the development of our organization, bringing her intense interest and knowledge of plants and natural communities to our work, helping us appreciate the living things that inhabit the places we have protected and see the wonder of the small things amidst the beauty of the large landscape. She was a driving force on our Board for the careful stewardship of the lands we protect and worked energetically on our preserve management plans as well as more mundane stewardship chores. Alison has started a consulting business that does natural



Alison Dibble displays the award she received in recognition of 15 years of service.

resource inventories and related work to which she is now devoting her time. We wish her the very best.

Garrity and Richardson Join Board of Directors

TIM Garrity and John Richardson, both Trust members and residents of Blue Hill, were elected to our Board of Directors to fill two vacant unexpired terms. Tim has been the President and CEO of the Blue Hill Memorial Hospital since 2002 and is the father of four children. He is an avid outdoorsman, who regularly walks our trails and who values the importance of conservation land to a community. John is the founder and pres-

ident of Blue Hill Hydraulics, an engineering consulting firm that serves clients across the country, and the father of two children. He also serves on the school board for the Town of Blue Hill and has a special interest in the educational opportunities that conserved land can provide.

Two current Board members were also re-elected to new three year terms at the annual meeting. Ellie Courtemanche of Penobscot has worked with a variety of non-profit organizations, including the Maine Community Foundation and the College of the Atlantic. She currently heads the development department at the Maine Maritime Academy in Castine and serves as chair of our fundraising committee. Whitney Landon of Brooksville is a graduate of Princeton University and brings a background in banking and experience working with various local businesses to our Board. He has served in the past as Treasurer and currently serves on our finance committee.



*Leave a Lasting Legacy
by naming the Trust
in your will.*

For more information: 207-374-5118

Trail Work: Many Hands Make Light Work



Volunteers helping with the trail work, (LEFT) Liberty School students, (ABOVE) Pete Colman with a crew of Landmark Volunteers, and (TOP RIGHT) Board Vice President John Merrifield and Blue Hill resident Courtney Haight.

THANKS to several groups of volunteers, the design help of trail master Peter Colman and the oversight of our Conservation Lands Manager Erika Rowland, we accomplished some major trail restoration work this summer and fall on our South Street to Parker Point Trail in Blue Hill. This trail crosses privately owned land on which we were granted a conservation easement last year. The easement expressly allows public use of the trail under the management and oversight of the Trust. The work included relocating a section of the trail, creating drainage ditches and building wooden “bog bridges.”

Stewardship: More Than Just Trails *by Erika Rowland*

TRAIL construction and maintenance have been an increasingly important part of our land stewardship work over the last few years. After all, we now have nearly 12 miles of trail to manage. It is rewarding work, and often fun, especially when a lively crew of volunteers assists us. But trail work is just one of our stewardship responsibilities on the conserved lands we own and on the lands on which we hold conservation easements.

Those other responsibilities begin with the boundaries. A property's conservation values cannot be protected if its boundaries are not known, clearly marked, and regularly maintained. Regular visits to monitor the condition of a property, including its use by both wildlife and humans, are also essential. Stewardship also involves collecting natural resource information as well as the history of human use. This information is especially important when new questions and issues arise that may require the revision of management policies or activities.

The stewardship of the properties on which we hold conservation easements is more limited in scope than the stewardship of the land we own, but it is often more complex and time consuming.

Throughout the summer, easement monitoring typically dominates my work schedule. I usually set aside 4-6 hours to monitor each property. Time is needed to review the easement terms, boundary information, and the monitoring report from the previous year, schedule a visit with the landowner, travel to the site, walk the property, and meet with the landowner. After each visit, I fill out a monitoring report form and write follow-up letters to landowners. Landowners sometimes have questions about easement terms, which require answering, and occasionally a violation occurs, which requires immediate attention.

The stewardship of conservation properties is an interesting and varied job, but often an unheralded one. Yet it needs to be done well each year for a property to be truly conserved in perpetuity.



New Trail Kiosks!

THANKS to Tim Farrar, an industrial technology teacher at George Stevens Academy, and Ken Weinberg, a Trust member who lives in East Blue Hill, we have new kiosks at our Osgood Trail on Blue Hill Mountain and our Kingdom Woods Trail. These handsome and durable new kiosks provide information about the land and the trail as well as provide sign-in sheets that we use for monitoring and safety purposes.

Walks & Talks: A Great Year

The eighth season of our annual Walks and Talks hit the mark: attendance was high and the response was enthusiastic. This year's program included eight events that ranged from a workshop in April on pruning wild apple trees to one in September on managing forestland for both wildlife and wood products. The program also included sessions on stream ecology and invasive plants, as well as a blueberry pick and hike at Caterpillar Hill (over 100 people attended!), a tour of a working farm protected with a conservation easement, a visit to the neighboring Great Pond Mountain Wildlands, and the second annual moonlight hike up Blue Hill Mountain (postponed in July because of lightning, but rewarded in August with magnificent beauty — see photo on page 1). A special thanks to all the trip leaders!



Ron Bryan, a forester with Maine Audubon, describes "Focus Species Forestry" during a September workshop at our Kingdom Woods Conservation Area.

Staff News

There have been some changes in our staff, although we remain lean, with two full-time and one part-time staff positions. **Erika Rowland**, our part-time stewardship coordinator for the last three years, is now full-time with a new title: Conservation Lands Manager. She will continue to direct our stewardship program as well as engage in the planning and negotiation of new land projects. This summer Erika was awarded her Ph.D. in forest ecology from the University of Maine.

Denise "Skip" Lang, has joined our staff as a part-time Program Assistant. A Blue Hill resident with Australian roots (and accent), Skip is the new voice that will greet you when you call our office. She replaces **Misha Mytar**, who left us after two and a half years of great work to return to graduate school.



The BHHT staff, left to right, Erika Rowland, Skip Lang and Jim Dow.

Office Open House: Connecting with Local History

OUR new office property is serving us well; it has given us a highly functional working space, a visible presence that is attracting new members and enhancing our identity and a location for workshops, (two of which were held there last spring). But the Carleton House is more than just an office; it is also a tangible part of Blue Hill's history. In August, after a fresh coat of paint had been applied to the outside of this 1815 structure, we welcomed community members to an open house. To our delight, many people stopped by, some just to walk through an old house they had long driven by, some to poke about in a basement that suggests what life might have been like in the 1800's, some to hear the comments of



Brad Emerson, a local authority on historic houses in Blue Hill (shown speaking in the photo above). The Carleton House is a part of the older history of this community; our organization is part of its more recent history. We seem to be a good match.

Exploring Opportunities for Collaboration

Vice President John Merrifield and Executive Director Jim Dow are representing our Trust in a series of meetings over the next few months with representatives from the five other local land trusts in Hancock County to explore the possibilities for collaboration on issues or projects of common concern. Assisted by a professional facilitator, these meetings reflect

our constant attention to both the short-term and long-term viability of our organization as well as our commitment to the fulfillment of the perpetual conservation obligations we have undertaken. Our eyes are always open for new and better ways to do our work. Similar conversations are happening across the country as small successful land trusts look to the future.

Great News: A 15-Acre Gift of Land in Blue Hill

GIFTS of land for conservation purposes still happen. That's good news for anyone concerned that local conservation efforts will not be able to keep pace with and balance the development activity that is changing the face of our landscape. It was certainly good news for us when we learned of Lorenzo Mitchell's proposed gift of a 15-acre tract abutting other conservation land we own.

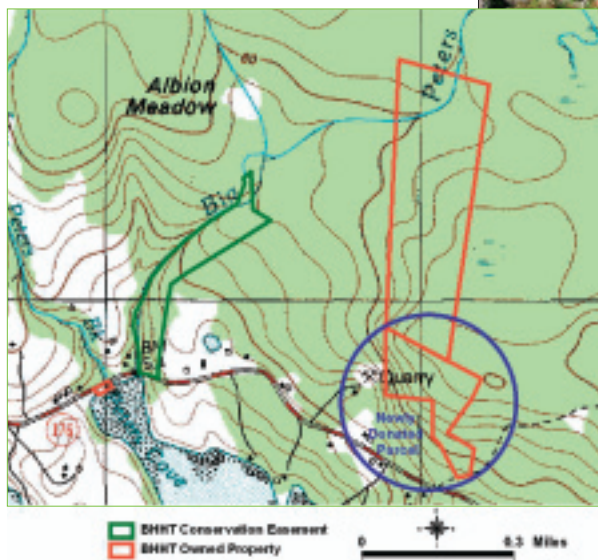
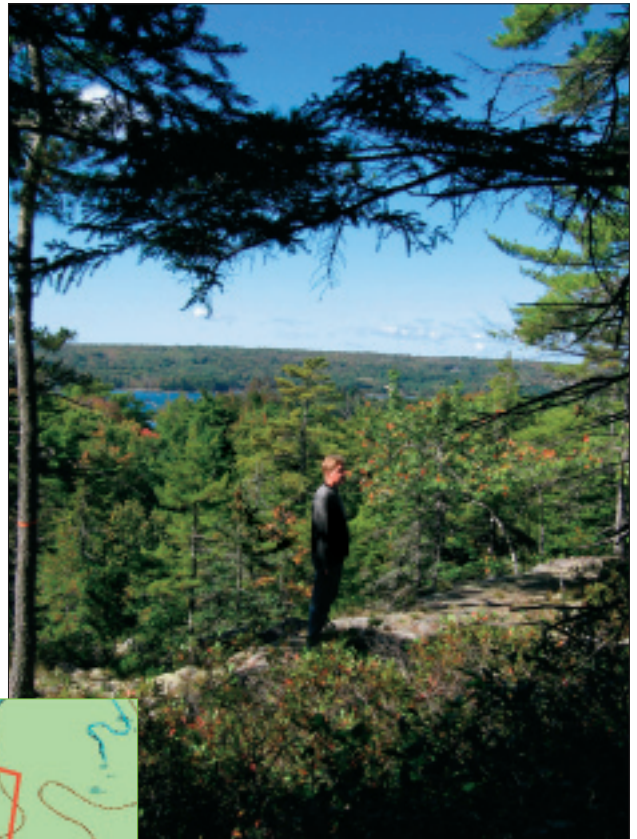
One goal of our recent land project work has been to expand the size of a few high priority conservation areas. This involves acquiring certain parcels of land that are adjacent to existing conservation land, if and when they become available. To interest us, a potential addition must enhance the protection of the conservation values protected by the original parcel and/or enhance our ability to effectively steward the land. This recent land gift met both those criteria.

This new land abuts a Blue Hill parcel that we acquired in 2004 from Duane and Colby Pert. As Colby put it then, "There ought to be some places where there aren't houses." Their land was one of those places. It included frontage on Peters Brook (near the Byers property on which we received a

conservation easement in 2005), a ridge line with views of Blue Hill Mountain and the harbor, intriguing granite outcroppings and forestland providing a variety of wildlife habitat. However, the southern boundary did not conform well to the topography, giving us stewardship concerns, and access for management purposes was less than ideal.

This addition cures those concerns as well as adds beautiful and interesting acreage that perfectly complements our other land. We are very grateful for this generous conservation gift.

Executive Director Jim Dow looks over the new acreage, a glimpse of Blue Hill harbor in the background.



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James W. Dow, *Executive Director*
Erika Rowland,
Conservation Lands Manager
Skip Lang, *Program Assistant*

Our Mission:

To conserve land and water of special ecological, natural, agricultural, scenic, cultural and recreational significance in Blue Hill, Brooklin, Brooksville, Penobscot, Sedgwick and Surry, and to work to increase public understanding of the importance of land and water conservation.