## Blue Hill Heritage Trust

Annual Meeting
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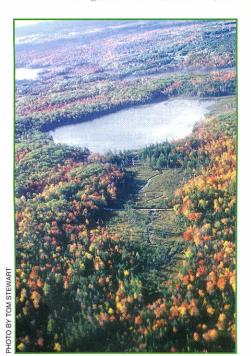
**FALL 2003** 

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

## A Critical 70-Acre Addition to Kingdom Woods

The Kingdom Woods Conservation Area is one of the Blue Hill Heritage Trust's premier natural areas. With undeveloped Fourth Pond at its center, these 600 acres of protected ecological richness sit quietly in the midst of a rapidly developing landscape. Now, after years of work and with the cooperation of sympathetic landowners, we have purchased a neighboring 70-acre tract of land that is a critical element in the protection of the conservation values of this place.

Our Kingdom Woods land has been acquired through a series of transactions. The first two tracts, one of which included the entire shoreline of the 50-acre pond, were acquired in 1998 with funds raised through a capital campaign dedicated to that purpose. Two more abutting tracts were added in 1999, and in 2000 a generous member donated a fifth tract. Although these acquisitions together amount to a significant achievement, our





conservation planning work made it clear that there was at least one other very important piece to this puzzle. That piece has now been added.

This new addition is a prominent part of the watershed of Fourth Pond, sloping westerly toward the pond to a point within a hundred feet of the shoreline. That alone would make it important. Yet this land also has attractions of its own, providing a diversity of habitats – blueberry lands, old fields, sections of hardwood and softwood forest, a portion of a small wetland – and harboring a variety of wildlife. It also has great scenic values, including views of Blue Hill mountain, In addition, it holds the potential for some wonderful walking trails.

### The transaction also included additional acreage.

The acquisition of this land was complicated by the fact that it amounted to only half of the parcel owned by the landowner, Allen's Blueberry Freezer, Inc. of Ellsworth. Although the land was

not on the market, George Allen, a principal in the company, felt it was land we should own because it complemented our existing conservation lands so nicely, yet he was uncertain about the wisdom of selling only half the parcel. The matter was ultimately resolved by our agreement to purchase the full 140-acre tract. Over the next few months we will be evaluating various options for the additional acreage.

Funds to cover the \$190,000 purchase price came from our Peninsula 2000 capital campaign (the high priority 70-acre portion of this land was one of the properties that the capital campaign was intended to fund), a gift from Lucy Marshall Chamberlain, and from an internal loan, necessary to complete the funding package for the full 140-acre tract.

We are grateful to George and Roy Allen for working with us on this project. Their cooperation has allowed us to take this important step forward in the conservation of a remarkable place.

### Morgan Bay: Two Gifts

Thanks to the generosity of two landowners, the conservation work at the head of Morgan Bay continues. Two recent gifts build on the work begun with the establishment of the Carter Nature Preserve in 1995 and continued with the protection of the nearby Furth Wildlife Sanctuary in 2000 and Emerton Heath in 2002. All of these projects were done in partnership with the Friends of Morgan Bay, a group of local residents dedicated to the conservation of this part of the Blue Hill peninsula.

#### Nowick Gift: Marshland Will Nurture Birds

One of the loveliest small marshes on the peninsula is in Surry, where Morgan Bay and Emerton Brook meet, close by the Carter Nature Preserve. Part of the Furth Wildlife Sanc-

tuary borders this little gem of Spartina grasses and mud flats. Thanks to a gift from long-time Surry resident Walter Nowick, a key five acre tract along this marsh is now owned by the Trust as conservation land.

The land includes both upland and marsh habitat. The marsh is rich in shorebirds that feed at low tide in the mud flats in the fall. In the summer the upland is busy with nesting warblers,



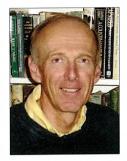
Nowick gift protects a portion of this marsh at the head of Morgan Bay.

such as the chestnut-sided, the common yellowthroat, and the yellow, as well as the northern water thrush and various species of flycatcher. This gift not only protects migrating and nesting birds to-day, but helps assure their survival into the future. *Thank you*, *Walter!* 

#### Sopkin Gift: A Trail Easement

Carol and George Sopkin made a gift of a slightly different kind. Owners of land that abuts our Carter Nature Preserve, they donated a trail easement across their land that will allow us to provide an enhanced experience to the visitors to the Carter Nature Preserve. A trail is being designed that will extend the existing preserve trail, creating a loop trail that traverses a variety of habitat and allows visitors to return to the trailhead without retracing their steps. Thank you, George and Carol!

### Message from New Board President Ben Emory



At its September meeting, the Trust's Board of Directors elected **Ben Emory** as its new president. Ben has had a professional career in land conservation and has served

on numerous non-profit boards, including many years on the Trust's board. He has a home in Brooklin and also owns property under conservation easement. He succeeds Alison Dibble, who served as president for two years and will continue to serve as a member of the Board.

Blue Hill Heritage Trust's work is vital to the life of everyone who treasures the land and water resources of our six towns. I ask for the help and support of all Trust members in conserving important parcels of land – scenic shorefront, land

for outdoor recreation, farmland, wetlands, fragile ecological areas, wildlife habitat, and community open space. Increasing suburbanization is bringing rapid changes to our communities, some good and some unfortunate. Facing these changes we must do everything possible to try to ensure that they do not destroy the area's natural qualities, which tie us so strongly to this special corner of the world. As we conserve important natural lands, we must seek to benefit the lives of all citizens, take into account legitimate competing demands for land and water resources, and cooperate with local governments and other citizen initiatives.

Priorities for Blue Hill Heritage Trust include the following:

- Protect more land of conservation importance.
- Continue strengthening capabilities to provide proper oversight of protected lands.

- Expand public understanding and appreciation of the benefits of the Trust's work.
- Increase substantially the Trust's annual operating income.

The last-listed priority, to increase the annual operating income, is critical. The Trust cannot long maintain present levels of staffing and accomplishments without significant growth in income. We are committed to expanding the membership and other sources of support, but we also ask current members to consider supporting the Trust's work at a higher level of annual contributions and dues.

You, the members, are the foundation of Blue Hill Heritage Trust. As volunteer workers, as contributors, and as sources of expertise and vital information you make possible all that the Trust does. The board of directors and staff thank you most sincerely. Executive director Jim Dow and I encourage you to contact either of us at any time with ideas, questions, criticisms, and suggestions.

## Stewardship... Work Continues

#### Landmark Volunteers Lend a Hand

Thirteen energetic teenagers and an adult leader contributed over 1000 hours of labor to our stewardship projects this summer through the Landmark Volunteers program. They built drainage ditches on our Osgood Trail on Blue Hill mountain, developed a new trail at our Kingdom Woods Conservation Area

(to be known as the "Landmark Loop Trail," in their honor), worked on an extension of the trail at our Carter Nature Preserve and cleared brush on our Cooper Farm land on Caterpillar Hill. They made a difference, and had fun. We are very grateful for their help. Landmark Volunteers is a non-profit summer service organization that provides young people "a chance to understand how voluntary service functions as an essential element of the American experience."

# Annual Monitoring of Conservation Easements Completed

Led by our Stewardship Coordinator Erika Rowland, and with the assistance of Board members and other volunteers, we completed our annual monitoring program for the conservation easements we hold on privately owned property. This involves meeting with the landowners, discussing any changes on the property within the scope of the terms of the easement and viewing the land itself. We place high value on our relationship with these landowners, for in essence, the conservation easement makes us partners in the protection of their land. Maintaining these relationships and building relationships with new owners, when the properties change

(Top) Workshop in May for owners of land protected by conservation easements.
(Right) A Landmark Volunteer helping with vegetation management.
(Below) Maine Conservation Corps crew members at work on trail.



ownership, helps prevent disagreements that can lead to legal action to enforce the legally binding restrictions. When and if that is ever necessary, however, we have established a Conservation Easement Defense Fund to help pay for legal assistance in fulfilling our responsibilities. Meanwhile, our Conservation Easement and Land Stewardship Fund, built in part with landowner donations that accompany the gift of each conservation easement, helps fund our monitoring program.

## Trail Restoration Project: "Stairway to Heaven...."

In early October, we celebrated the completion of a 400-foot stone staircase up the eastern slope of the Blue Hill Mountain, part of a major restoration effort of a popular trail to the summit. The staircase, including a stone drainage system, replaces a section of severely eroded trail on land owned by the town of Blue Hill. Trail expert Lester Kenway designed the restoration work; Birgit Frind coordinated the project; a talented and industrious crew from the Maine Conservation Corps program, aided by local volunteers, did the construction; the Maine Recreational Trails program and donations from local residents provided the funding. The Trust was proud to work in partnership with the Town of Blue Hill and the Friends of the Mountain on this project. It is a lasting gift to our community. Many thanks to everyone who helped!



RECORD ATTENDANCE, a clear sense of accomplishment, and an inspiring speaker helped make our 18th annual membership meeting, held on August 12th in the Bay School's Emlen Hall, one of the best ever. The words of author Terry Tempest Williams, who spoke about the

meaning of place and the importance of the relationship between people and land, made the evening especially memorable. Yet the business portion of the meeting, full of news about the steady progress of our organization, also provided inspiration. Below are the highlights from the reports of the President and Treasurer of our Board of Directors.

#### President's Report-Alison C. Dibble

The past year has been one of progress in both the core work of conserving significant elements of the Blue Hill peninsula's landscape as well as in developing our organization so as to be able to meet the challenges ahead.

**Land Protection.** By the end of the year we expect to pass the 4000 acre mark in total land protected, including both conservation easements on privately owned land and land owned by the Trust. We currently hold easements on 46 parcels of land and own 12 preserves that includes 23 tracts of land. We expect to complete 8 new projects in 2003.

**Strategic planning.** The Board has adopted our organization's first strategic plan, which will guide our work over the next five years. Our annual operating goals will flow from this plan. The Board has also been revising its land conservation plan.

We obviously cannot and should not protect everything; our mission is to protect lands with *significant* conservation values.

Stewardship. We have been devoting increasing attention to the stewardship of the lands we own and those on which we hold conservation easements. This is the critical but perhaps less glorious second piece of land conservation work - the more land you protect, the more stewardship work there is to do. This year we hired Erika Rowland as our stewardship coordinator (Erika brings a wonderful combination of academic, land management and inter personal skills to our land management work – we are very lucky to have her.) The work has also included the development of walking trails where appropriate to help people connect with the land and the sponsoring of a stewardship workshop for the owners of the lands on which we hold conservation easements. It has also included trying out new ideas, like developing an arrangement with a local organic blueberry farmer that will allow us to efficiently fulfill our responsibility to keep the fields on Caterpillar Hill open.

**Board and Staff Development.** We need to attract and put to good use the human resources of our community. We now have a Board committee structure that breaks down our work into small chunks,

and invites the participation of non-Board members as well. We are attracting high quality persons to our Board to help with the work. Our staff, though small (one full-time and two part-time) is of high quality, and is helping us do a lot with modest means.

Membership. Our membership passed the 500 mark during the past year. Our members remain the key to our past and future achievement. They are the ones that provide the support that allows the work to go forward. We are working hard to show a high return on our members' investment. We are also working hard to attract new members. That work includes, amongst other things, annual and very successful Walks and Talks program. This year it also has included an outreach effort to area businesses, highlighting the central element our landscape plays in the local economy and, thus, our common ground.

This has been the second and final year of my service as Board president. It has been a distinct honor. Thank you all for your continuing support of this fine organization. Together we can make a difference in protecting the character of this wonderful place.

#### Treasurer's Report-John Murphy

I want to thank the other members of our Finance Committee (Fred Heilner, Don Furth, Whitney Landon, Mike Allen) and our Investment Committee (Jim Kannry, Bob Marville, Stan Myers, Rick Tonge) who have worked with me and our Executive Director Jim Dow over the year to guide our financial activities.

### During 2002 (our fiscal year is the calendar year):

- We met our operating budget, thanks to your generous contributions, including a record amount of contributions in December.
- We received our first major bequest, a \$109,000 unrestricted distribution from the estate of Surry resident Robert Jordan. Planned gifts such as this are important elements in our efforts to build an enduring organization. They provide capital for our endowment and land work. I encourage each of you to consider naming the Trust in your wills.
- We continued to receive gifts fulfilling prior pledges to our Peninsula 2000 capital campaign. I am pleased to report that despite the turbulence in the stock market since 2000, those pledges are being honored with only a couple of exceptions.
- We finished the year with net assets, which includes the book value of conservation lands we own, worth slightly over \$2.5 million.
- We had our financial records audited, as we have each year since the Trust was founded. This year the

audit was performed by the accounting firm of Loiselle, Goodwin and Hinds.

#### For the current fiscal year, 2003:

Our operating budget is \$140,000, about 75% of which is provided by annual member gifts and small operating grants.

Contributions are down relative to this time last year, reflecting the tough economy, but we remain hopeful, and are working hard to meet our budget needs.

Our endowment fund, to help support our annual operating and stewardship costs, stood at \$441,000 at the end of July.

The Board has established a Conservation Opportunities Revolving Fund, as promised in our Peninsula 2000 capital campaign literature, to help us take advantage of land conservation opportunities on relatively short notice.

The Board has also created a Conservation Easement Defense Fund to provide ready cash to meet our legal obligations to defend the terms of the conservation easements that we hold.

The Trust has been awarded a \$20,000 matching grant from the state of Maine, to help pay for the restoration of the hiking trail on land owned by the Town of Blue Hill, on Blue Hill Mountain. This restoration project is being done in partnership



An aerial view of a property in Brooksville protected by a conservation easement held by the Trust.

with the Town of Blue Hill and the Friends of Blue Hill Mountain, an informal association of people who love and use the mountain.

Thank you all for your continued support.

#### Two Volunteer Recognition Awards Given

One highlight of each annual meeting, always inspiring, is the special recognition of persons who make extraordinary contributions to our work as volunteers. This year the Trust presented two volunteer recogni-

tion awards. Below are the remarks of Alison Dibble in making these awards:

### Paul Birdsall, for extraordinary conservation leadership

The first award is to a person who has truly made extraordinary contributions to this organization and to this place over the course of many years. He has given, and continues to give, exceptional amounts of time and money and energy to our work. He has also led by example, donating conservation easements on his land. He is one of our founding Board members, one who has never (in his 18 years of service as a Board member) lost his fire for land conservation. For his extraordinary contributions

to Blue Hill Heritage Trust and to land conservation on the Blue Hill peninsula, and for his pioneering leadership in the conservation of local agricultural land, we want to express our thanks and gratitude to Paul Birdsall.

#### Friends of Morgan Bay, for devotion to the Surry area

The second recognition award goes to a group of people who have worked together for ten years to promote the conservation of a part of our peninsula that is especially dear to them. We have worked with them to protect the Carter Nature Preserve,

the Furth Wildlife Sanctuary, Emerton Heath and the Nowick property – approaching 200 acres of land, with more to come! They are our partners in the conservation of the Morgan Bay area of Surry. These are devoted people who give deeply of themselves to this work. And their model, people informally associating to work together to protect the place that matters most to them, has already been replicated by others. For their exceptional achievements, we are proud to recognize our friends, The Friends of Morgan Bay.

#### Reading the Landscape...

#### Asian bittersweet: beautiful but invasive

#### By Pam Johnson

The beautiful Autumn colors in the local landscape often reflect human influence: swags and tumuli of

lime green marching across fields in late September and fantastic columns of bright lemon-yellow vining through bare branches in October and November signal the increasing abundance of

Asian bittersweet (Celastrus orbiculatus).

Asian bittersweet, like many plant species considered invasive throughout the country, was introduced to this area as a desirable ornamental vine; its aggression was unforeseen. The twining stems need no support to climb and overwhelm surrounding vegetation. The late fall explosion of bi-colored fruit attracts birds and people who unwittingly guarantee the plant's survival beyond its vegetative reach. There is an American bittersweet (Celastrus scandens) with better manners than its non-native cousin, but its relatively sedate behavior means the native vine cannot compete successfully with the rampant introduction.

American bittersweet's fruit is produced terminally, not in axillary



clusters along the stems, as is the case with Asian bittersweet. Botanical identification is one of the steps in controlling plants which have succeeded too well, to the detriment of diverse, neighboring vegetation. Eradication of an invasive plant, or colony of plants, requires careful thought and strategy. The University of Maine's Cooperative Extension produces two useful bulletins: #2500, "Gardening to Conserve Maine's Native Landscape," which lists invasive plants; and UMCE's bulletin #2502, "Native Plants: A Maine Source List," lists retailers of native species. Both brochures are available at the Trust Office.

## Buying Art to Conserve Land...

Thanks to a local business and six local artists, we will all have the opportunity to buy some fine art this holiday season, while at the same time helping support the work of the Blue Hill Heritage Trust.

From Thanksgiving until Christmas, Blue Hill Books, owned by Nick Sichterman, a member of our Board of Directors, and his wife Mariah Hughs, will display and offer for sale recent paintings by these artists: Chris Baker, Louise Bourne, Tom Curry, Becky McCall, Jetsun Penkalski, and Sherry Streeter.

All of the paintings will in some way feature Blue Hill Mountain. A percentage of each sale will be donated by the artist to the Trust. Treat yourself or a loved one to a gift of art for the holidays!



A painting by Chris Baker, of the trail work on Blue Hill mountain.



#### Getting to know the land: Walks and Talks 2003

Our annual Walks and Talks program forms the core of the education work that is part of our mission. This year, once again, we offered our members and the general public a range of events to help us all better understand the natural history of our peninsula, to visit some of the special places in our midst and to enjoy each others company. The response was terrific: a total of nearly 200 people participated in the various events from April to September.

We extend our deep appreciation to the knowledgeable people who volunteered their time and expertise as trip leaders: Charles Duncan, Chip Moseley, Rob Baldwin, Susan Shetterly, Pam Johnson, Ann Brayton, Peter Lindquist, Sally Rooney, Roger Hooke, Alison Dibble, and Erika Rowland.

#### BLUE HILL HERITAGE TRUST

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John Murphy, Treasurer, Sedgwick
LouAnna Perkins, Secretary, Penobscot
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Ellie Courtemanche, Penobscot
Alison Dibble, Blue Hill
Whitney Landon, Brooksville
Bruce Norelius, Brooksville
Katrina Parson, Brooklin
Susan Hand Shetterly, Surry
Nicholas Sichterman, Blue Hill

#### STAFF

James W. Dow, Executive Director Erika Rowland, Stewardship Coordinator

#### **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.

#### We are pleased to recognize these Business Members who support our work.

Bar Harbor Banking & Trust Blue Hill Books Blue Hill Family Chiropractic Blue Hill Garage Blue Hill Peninsula Dental Elliott, Elliott & Norelius Architecture Fairwinds Florist First National Bank of Bar Harbor Handworks Gallery Leighton Gallery Maine Coast Veterinary Hospital Mainescape, Inc. M.E. Astbury & Son, Inc. MetLife Resources Michael Hewes & Company Oakland House Seaside Resort Orland House B&B Peninsula Property Rental Prin A. Allen & Sons Randy Eckard Gallery The Blue Hill Inn The Photography Curator Resource Union Trust Company Wardwell Oil

WEM Woodworks

## Executive Director's Column... In Memoriam, In Perpetuity

In early October, I attended the funeral of Lucy Marshall Chamberlain. Marshall, as she was known to her many friends, was an early and important member of the Blue Hill Heritage Trust family. I was there to pay our respects and to acknowledge, one last time, her contribution to our work.

In 1986 Marshall donated a conservation easement on her 17 acre shorefront property in Brooklin to the Trust. The organization was less than a year old and untested; this was its first easement. Yet Marshall had faith. She was committed to land conservation, and she understood that her own mortality limited her ability to protect this land in perpetuity. Her faith, and generosity, helped give life to our organization.

Marshall lived a long life – she died at age 93 – and her commit-

James Dow

ment to our work continued to the very end: shortly before her death, we received a check from her with the simple instruction, "for land acquisition."

Although Marshall has left us, her gift of a conservation easement endures, as does the commitment to conservation that she so strongly held, thanks to the organization that she helped get moving. Our commitment, our responsibility, is in perpetuity. Marshall did her part. It is now up to the rest of us to do ours. Goodbye, Marshall, and thank you.



## Dow Selected by Governor for Aquaculture Task Force

Jim Dow, the Trust's Executive Director, is one of eleven citizens from around the state chosen by Maine's Governor John Baldacci to serve on a task force created by the Maine Legislature to advise it on the planning and development of marine aquaculture along the coast of Maine. As part of its work, the task force has held a series of public meetings up and down the coast, including one in Blue Hill in late September. The group will be presenting its recommendations to the Legislature in early January, 2004.

#### Norelius and Courtemanche Elected to Board

We are pleased to welcome Ellie Courtemanche and Bruce Norelius to our Board of Directors. Both were elected to three year terms at the annual membership meeting.

Ellie is a resident of Penobscot and works as the Director of Development at the College of the Atlantic in Bar Harbor. She previously worked with the Maine Community Foundation and with Gary Friedmann and Associates, the consulting firm that assisted us with the completion of our Caterpillar Hill campaign. She has been a member for several years.

Bruce is a resident of Brooksville, where he has been restoring the old school house building in Buck's Harbor. He is an architect and a partner in the Blue Hill architecture firm of Elliott, Elliott and Norelius. Bruce has been serving as a volunteer member of our Stewardship Committee.

## Partnership Works... More "Farmland Forever"

The Lorio Farm, a 116-acre parcel of prime farmland in north Blue Hill, will forever remain available as farmland, thanks to the cooperative efforts of the former and current landowners, the Blue Hill Heritage Trust, the Land for Maine's Future (LMF), the Maine Department of Agriculture (MDOA), the United States Department of Agriculture (USDA), and the Maine Farmland Trust (MFT). A conservation easement, purchased with funds provided by the LMF, the USDA and the Trust, will protect the land from future development.

Three years ago, landowners Paul and Ann Brayton approached the Trust, aware of our farmland conservation work. Their land, having beautiful views of Blue Hill mountain and the mountains of Acadia National Park, was worth considerably more as developable residential land than as farmland, but they wanted it to remain as farmland if possible. Meanwhile Robyn and Noah Lorio, a young

# 116 acres of prime farmland matched with a young farm family

couple who had apprenticed on nearby organic farms, were looking for land to farm. It was a fortuitous match, but the match required some help. Because the land was within the Route 15 corridor of prime agricultural soils, the Trust pledged its assistance.

With this pledge of assistance, the Braytons were able to sell the land to the Lorios at its "farmland" value, i.e., the market value of the land with development restricted to the farm residence and agricultural buildings. Meanwhile, the Trust went to work building a partnership to help fund the purchase of the developments rights, the difference between the farmland value and the value of the land unrestricted. In August, the second part of this two-part transaction was finally completed, thanks to the patience, hard work and cooperation of the partners.

"This project continues our Farmland Forever program which seeks to protect the agricultural lands along the Route 15 corridor from North Blue Hill to Orland," says the Trust's Executive Director



The Lorio Farm protects some of the richest agricultural soils in the county, as identified by the U.S. Department of Agriculture.

Jim Dow. "These lands have the best agricultural soils in Hancock County, and they are part of the infrastructure necessary for a local food supply. They also provide scenic views and wildlife habitat. We are pleased that the importance of this work is recognized by our state and federal partners."

LouAnna Perkins, Executive Director of the Maine Farmland Trust and a member of Blue Heritage Trust's board of directors, provided important assistance in completing this project. "It is wonderful to see this farmland protected, and to have a young farm family working the land," says LouAnna. "Entering farmers

are having difficulty finding affordable farmland. Available agricultural land is diminishing everywhere around the state as residential and commercial development increases."

#### 10 local projects – 1400 acres of farmland protected

This is the Blue Hill Heritage Trust's tenth local farmland project. These projects have protected nearly 1400 acres of farmland through the use of conservation easements. "All of these projects have involved landowners who share our interest in farmland conservation," adds Dow, "and all of these lands remain in private ownership."

Conserving the Ecology & Beauty of the Peninsula Landscape

## BLUE HILL HERITAGE TRUST

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

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