

2020 SURVEY

of MASSACHUSETTS LAND TRUSTS



**“We are blessed
to live and work
in a state so
committed to land
conservation.”**

—SURVEY RESPONDENT



(above) Public and private conservation groups work with community members to build a neighborhood park on a vacant lot in Dorchester. © Trust for Public Land (left) Land Trust staff and volunteers participate in a workshop on conservation planning at the 2019 Massachusetts Land Conservation Conference in Worcester. © Norm Eggert

INTRODUCTION

In the fall of 2019, the Massachusetts Land Trust Coalition (MLTC) set out to survey land trusts and other private nonprofit organizations engaged in the protection or management of conservation land in Massachusetts. The goal of this survey was to improve our understanding of the achievements, interests, and needs of these organizations across the Commonwealth.

Out of a total of 147 organizations contacted, 113 land trusts responded, for a participation rate of 77 percent. Such robust participation provides highly reliable survey results, which allow population estimates to be generated with great confidence. The results of this survey will guide the MLTC and other conservationists in assisting land conservation in Massachusetts. We're pleased to present some of the major findings from the survey here. To view a presentation of the full results, visit massland.org/resources/survey.

SURVEY METHODS

The MLTC partnered with the University of Massachusetts Amherst's Family Forest Research Center to implement the survey. The survey was distributed electronically to the MLTC's list of organizations beginning in November 2019, with repeated follow-up over succeeding weeks. Survey responses were collected through March 2020, reviewed for accuracy, and analyzed. While the vast majority of organizations surveyed define themselves as land trusts, a few are environmental organizations for which acquisition and management of conservation land is not their sole purpose. For purposes of simplicity, in this document we will refer to all the survey respondents as land trusts.

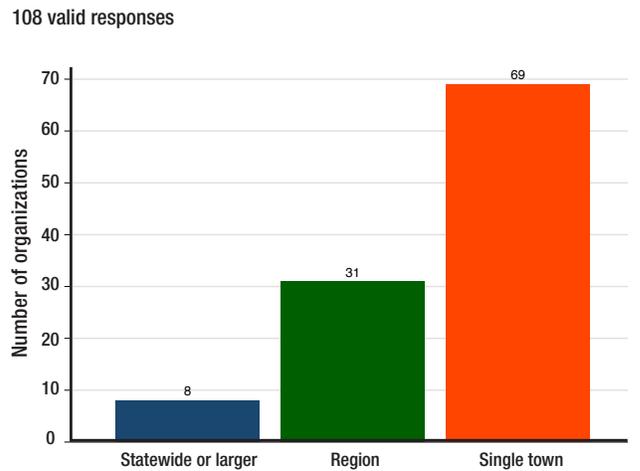
KEY SURVEY FINDINGS

- The Massachusetts land trust community includes no fewer than 147 diverse and dynamic private organizations, which, in aggregate, are active in every community in Massachusetts.
- Two-thirds of responding land trusts serve single communities, while more than a quarter are involved

in multiple communities in a particular region of the state. More than 50 percent have less than one full-time-equivalent paid staff member or consultant, and another nearly 40 percent have between one and fourteen such paid workers. Two-thirds of responding land trusts report that volunteers provide significant assistance in their work.

- While diverse in many ways, land trusts are largely unified in their priorities, working as private organizations to provide essential public benefits, such as natural resource and habitat protection, climate adaptation, drinking water supply, and preservation of scenic beauty and recreational opportunities.
- Land trusts provide long-term stewardship of properties that they own (i.e., for which they hold fee title) as well as properties that are owned by others, subject to a perpetual conservation restriction (known as a conservation easement in other states) held and enforced by the land trust. Massachusetts land trusts hold fee title to a significantly greater percentage of the land under their stewardship compared to the national average for private conservation organizations. Of the 113 survey respondents, 82 land trusts answered questions regarding their property holdings, reporting an aggregate of 144,481 acres owned in fee and 98,307 acres held under conservation restrictions.
- Land trusts play a critical role in providing professional, fundraising, and public education assistance to public agencies, partnering with municipalities, state and federal agencies, and other land trusts in the conservation of hundreds of thousands of additional acres of land. Nearly 90 percent of responding land trusts work with their municipalities on land conservation projects.
- Funding from public sources is a priority for land trusts to leverage the land donations and private fundraising that are used to complete land conservation projects. Among the many organizational challenges facing land trusts, organizational sustainability was cited twice as frequently as other concerns, suggesting opportunities for assistance.

FIGURE 1. Organization coverage area



CHARACTERIZING LAND TRUSTS

The community of land trusts in Massachusetts is robust, with a long history of land protection and innovation. One of the strengths of our land trust community is its diversity. Nearly two-thirds of responding organizations serve a single town, while eight organizations work at a scale that is statewide or larger (see Fig. 1). Between them, the 147 Massachusetts land trusts reach every community in the state.

Size. Land trusts report varied numbers of staff and supporters, although 71 percent have more than 100 members and supporters, and 26 percent have more than 500. Nearly a quarter of responding land trusts employ paid staff totaling between one and four full-time equivalents, while nearly half employ no paid staff. Notably, more than two-thirds of respondents reported reliance on volunteers, irrespective of how many staff members they have. Not surprisingly, organizations with larger numbers of paid staff have completed more projects and protected significantly more acres than have the smaller organizations (see Fig. 2a and 2b). Of those land trusts with paid staff, almost three-quarters report providing formalized training for staff members in 2019.

Operations. Land trusts range in age from brand new to more than a century old. While most are nonprofit corporations, a significant number are organized as charitable trusts, with trustees as board members rather than directors. Board size and meeting frequency vary,

FIGURE 2a. Acres held in fee, by paid staff size

79 valid responses (2a and 2b combined)

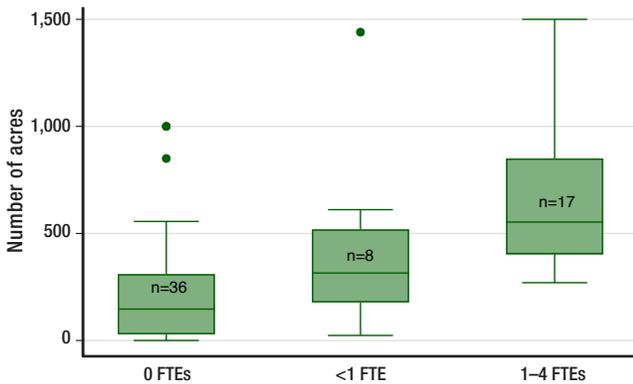


FIGURE 2b. Acres held in fee, by paid staff size

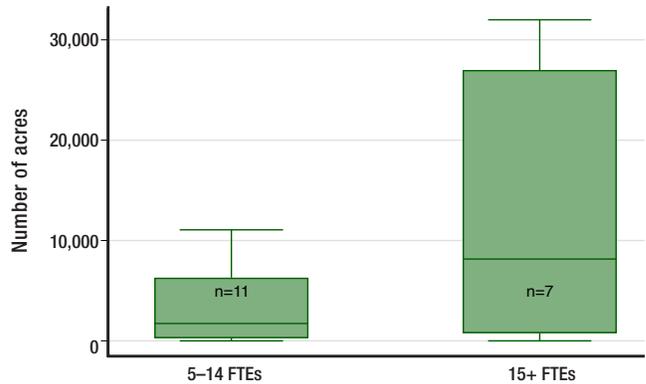
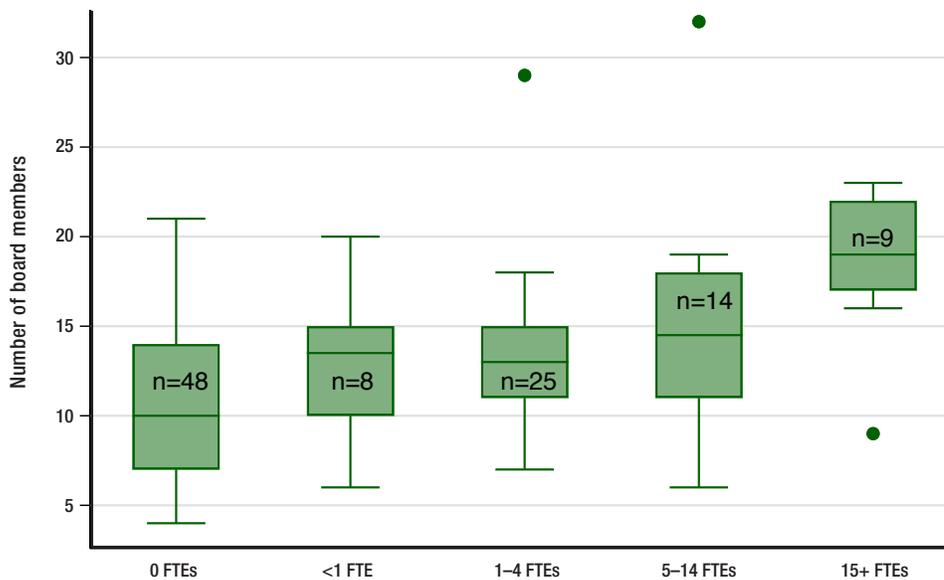


FIGURE 3. Number of board members, by paid staff size

104 valid responses

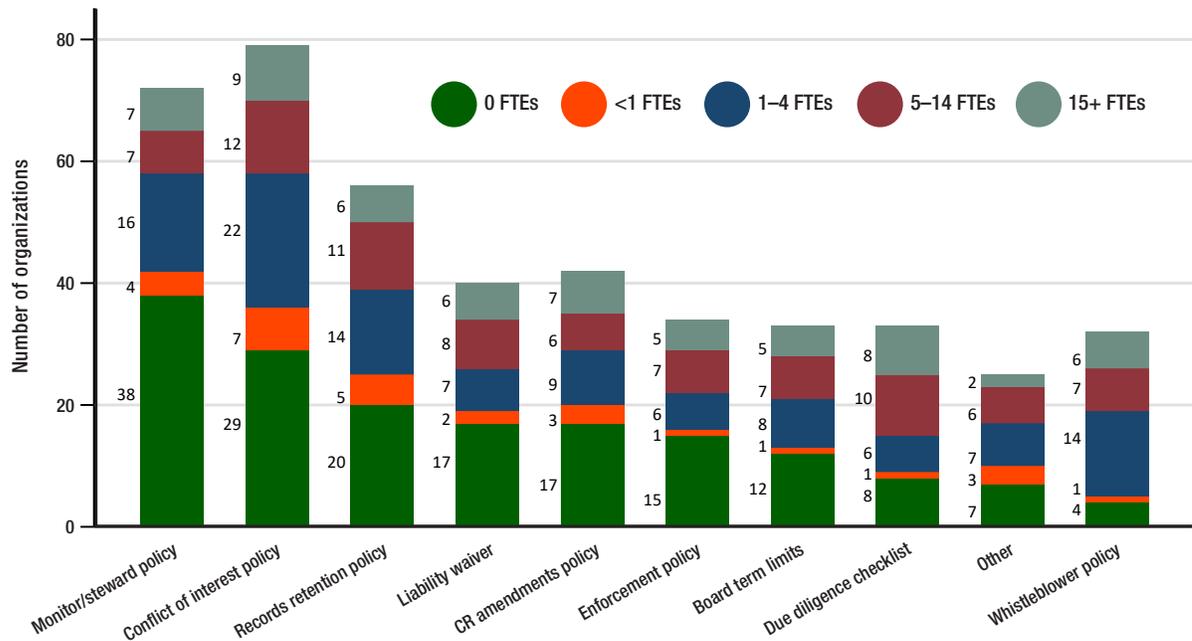


“Land trusts mitigate climate change through land conservation.”

—SURVEY RESPONDENT

FIGURE 4. Approved or reviewed, by paid staff size

Category responses not mutually exclusive. 104 valid responses



although the numbers for each are generally within customary standards (see Fig. 3). A land trust’s ability to conserve land in perpetuity depends on sound organizational policies and practices. While only eighteen respondents reported being accredited through LTA, 75 percent of the nonaccredited land trusts report having adopted Land Trust Standards and Practices in principle (see Fig. 13). However, many land trusts have yet to adopt some of the policies and procedures recommended in those Standards and Practices (see Fig. 4).

CONSERVATION PROJECTS

Priorities. Land trusts prioritize projects that provide essential benefits to the Commonwealth and its citizens, including habitat, drinking water, climate change mitigation, and scenic and recreational value (see Fig. 5). In addition, much of the land is open to the public for passive recreation as well as a wide range of other community activities (see Fig. 6). During the current pandemic, citizens across the state have dramatically affirmed the importance of local conservation land to their physical and mental health. Congestion in many treasured open spaces during the pandemic attests to the need for

the creation of additional permanently protected parks and conservation land.

Funding. Respondents incorporate a wide range of funding sources to complete land conservation projects. Donations, partial donations, and private fundraising are the cornerstones of land trust fundraising, with state, local, and sometimes federal funding (including the state conservation tax credit program) providing crucial leverage for voluntary donations (see Fig. 7).

Acquisition Due Diligence. As with other real estate transactions, the acquisition of conservation land and conservation restrictions customarily entails certain actions to limit the risk of unforeseen problems. In conservation transactions, due diligence is particularly important because of land trusts’ fiduciary duties and because charitable tax deductions may be sought by the seller. Survey responses suggest that more could be done to ensure that adequate due diligence occurs in all conservation transactions (see Fig. 8). For example, over 80 percent of respondents routinely complete a title review, whereas only about a third report that they usually complete a management plan for properties they acquire.

FIGURE 5. Land protection priorities

Category responses not mutually exclusive. 105 valid responses

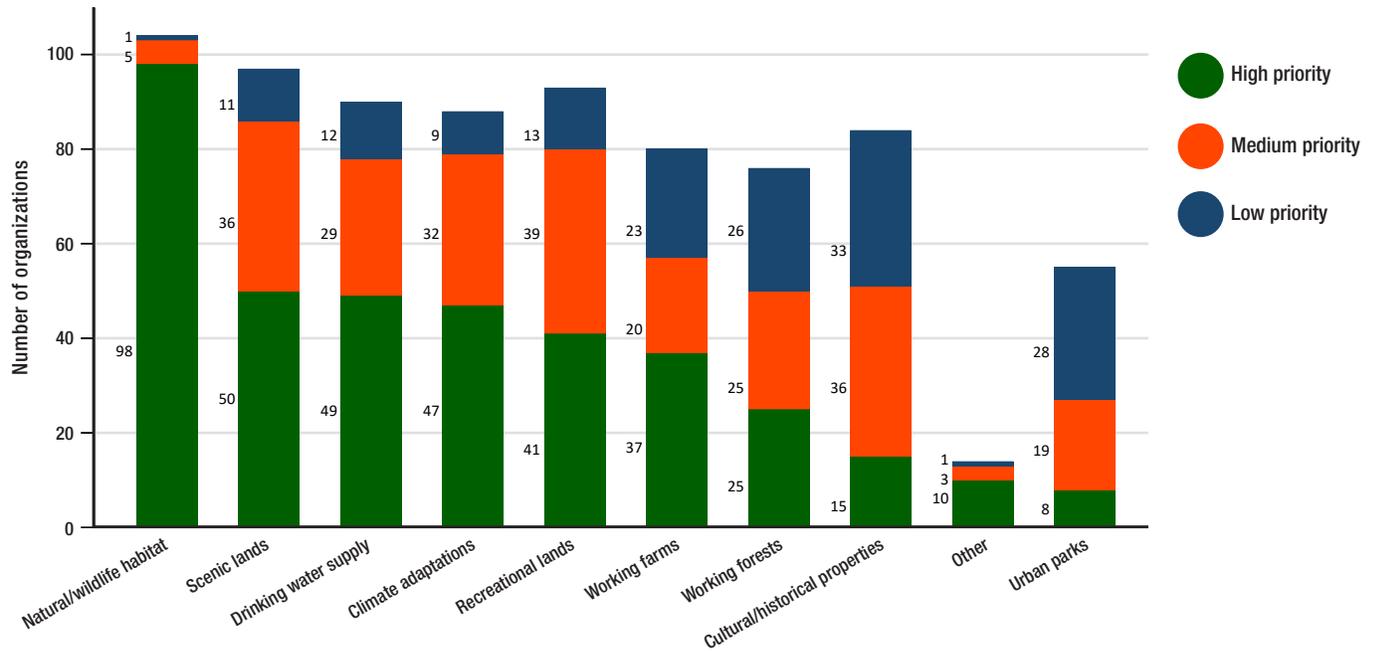


FIGURE 6. Activities allowed on land

Category responses not mutually exclusive. 104 valid responses

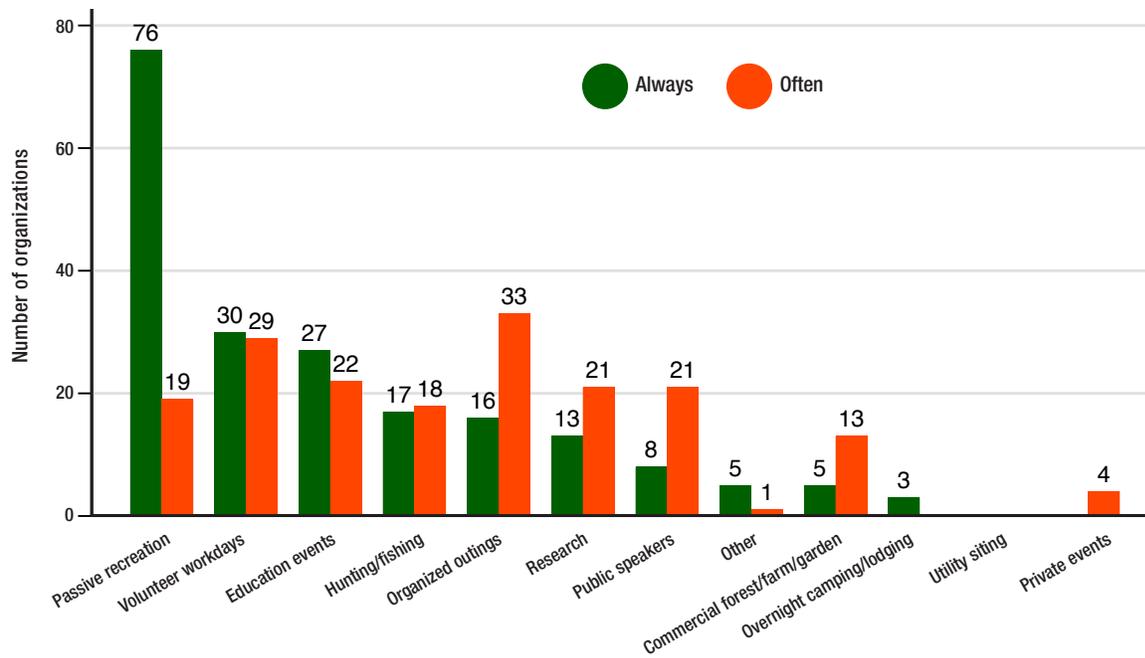


FIGURE 7. Funding sources for land protection projects

Category responses not mutually exclusive. 104 valid responses

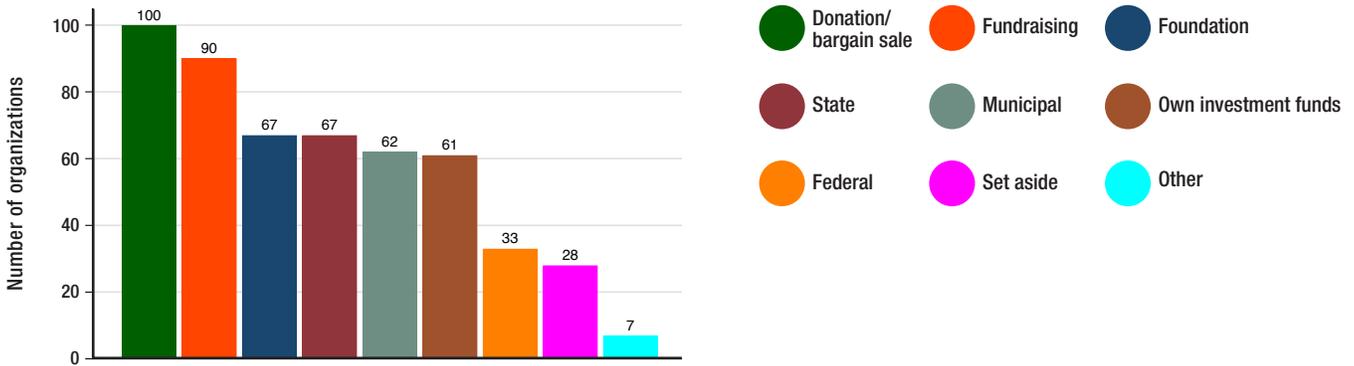


FIGURE 8. Actions when completing land transactions

Valid responses vary by action category.

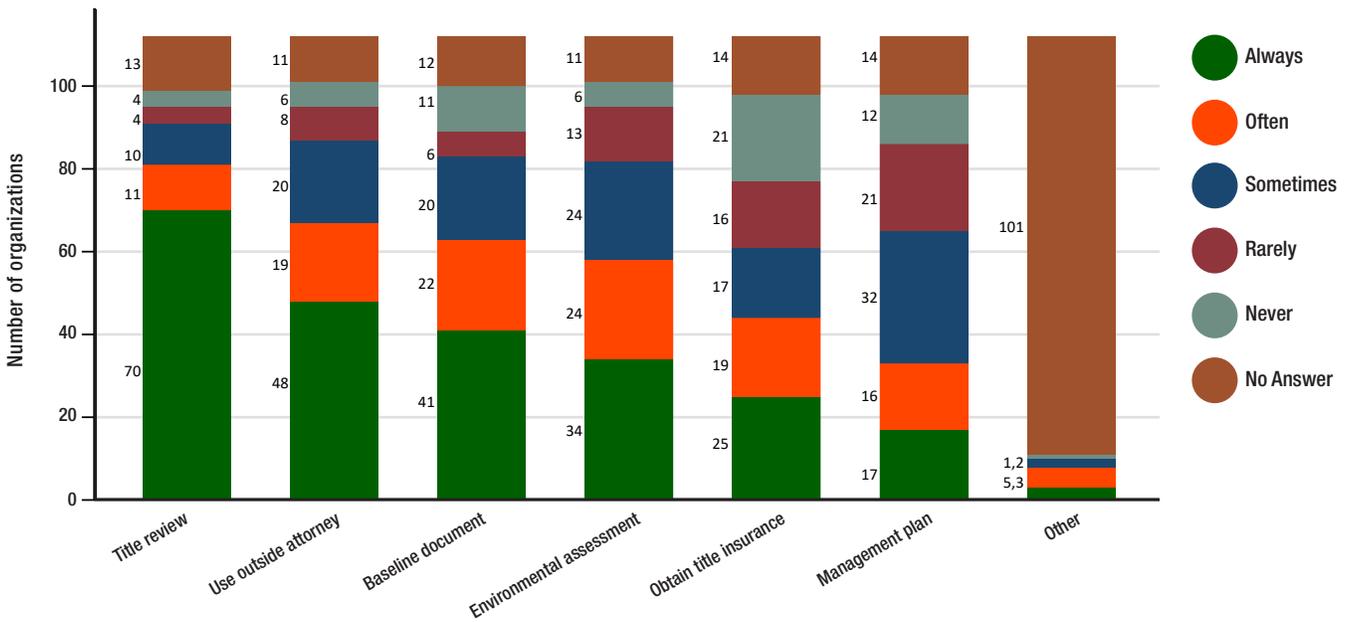
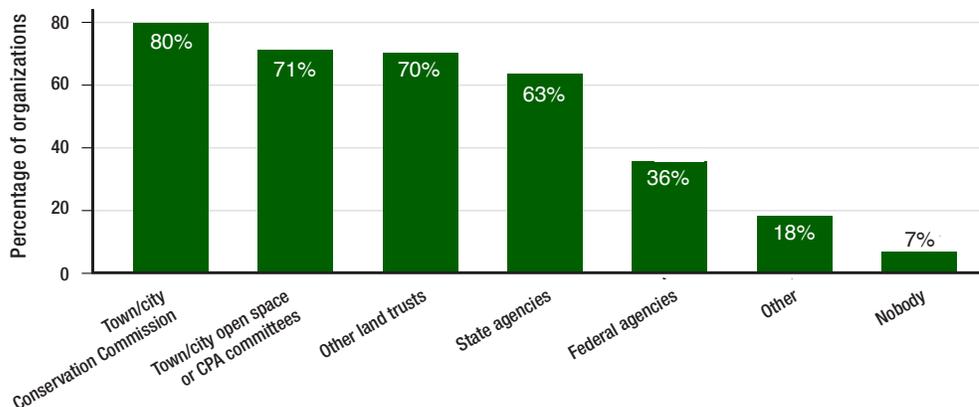


FIGURE 9. Partners in protecting land

Category responses not mutually exclusive. 104 valid responses



Partnerships. Land trusts are highly collaborative (see Fig. 9). Beyond the substantial direct impacts of their own conservation holdings, land trusts serve a critical role in helping to facilitate conservation acquisitions by municipalities, state agencies, federal agencies, and other land trusts. Land trust assistance comes in the form of technical and professional expertise, private fundraising, baseline documentation and management plans, pre-acquisition for later transfer, programming leadership, and public education. This assistance has helped partners in the protection and stewardship of hundreds of thousands of acres across Massachusetts.

LAND MANAGEMENT AND STEWARDSHIP

Allowed Uses. Activities permitted on conserved land vary widely, depending on the conservation values protected and the intention of the conservation parties. While passive recreation is allowed on properties of virtually all land trusts, a wide variety of other activities are allowed on some conservation lands (see Fig. 6).

Monitoring and Enforcement. Upon acquiring land and conservation restrictions, a primary responsibility of a land trust is diligently protecting the intended conservation values of those properties. The land trust accepts responsibility for long-term stewardship of the conservation values, either through its own management activities or through monitoring to ensure that the owner

of a restricted property is fulfilling the obligations of the legally binding conservation restriction. While best practice is for stewardship to be undertaken in accordance with a long-term management plan created by the land trust, almost one-third of respondents indicated that they always or often develop a management plan for their holdings.

More than 70 percent of reporting land trusts formally monitor their properties at least annually, and more than 80 percent monitor at least every three years. Land trusts with higher numbers of staff are more likely to monitor annually and to use staff rather than volunteers to do so (see Figs. 10 and 11). While just over half of responding land trusts report that their monitoring activity is funded through endowment funds, 80 percent of land trusts rely on funds collected through the transaction protecting the property. More than 70 percent of reporting land trusts have experienced either an encroachment on conserved land or a violation of the terms of a conservation restriction. Almost all respondents that reported such problems attempted to work with the violator, with about one-third reporting the need to engage legal representation or otherwise expend funds. Approximately one-fifth of responding land trusts reported experiencing enforcement challenges that are currently unresolved.

SUPPORTING LAND TRUSTS

Supporting the work of land trusts helps ensure the continuation of the high impact work of these

FIGURE 10. How frequently properties are monitored, by organization size

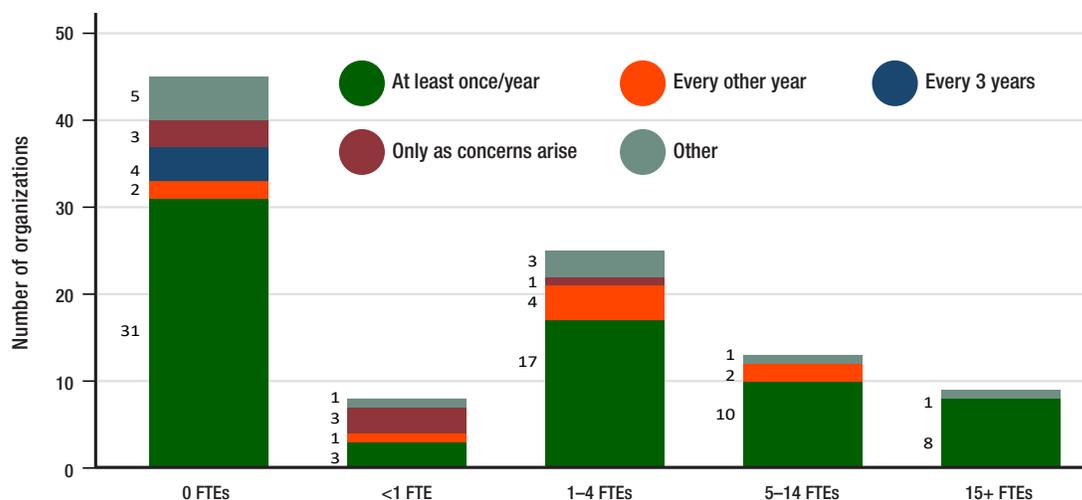


FIGURE 11. Who does most of the monitoring for the land trust, by paid staff size

104 valid responses

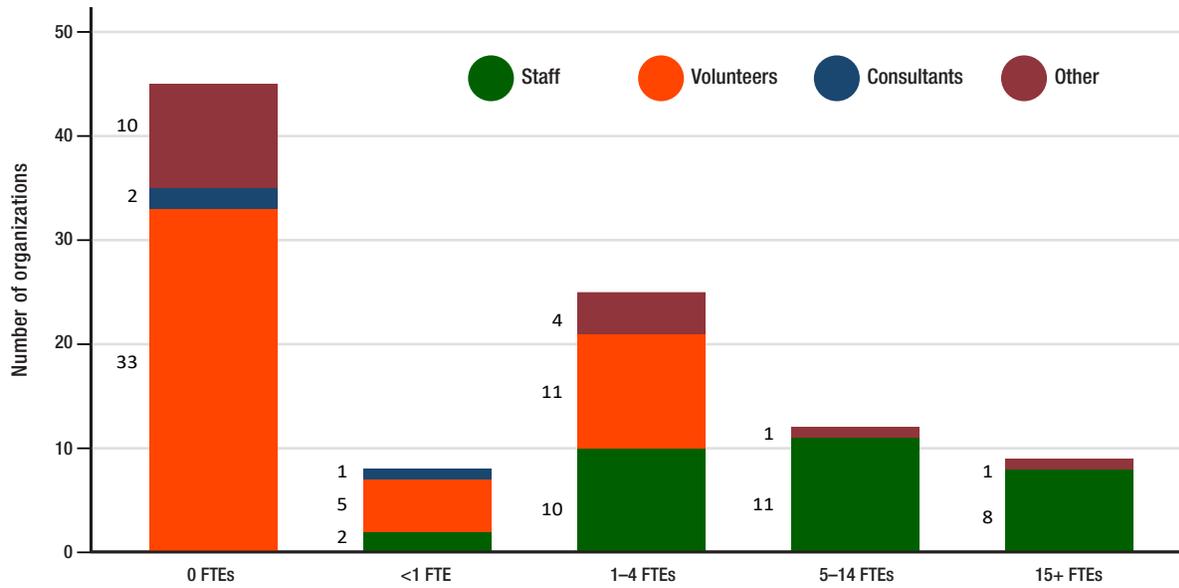
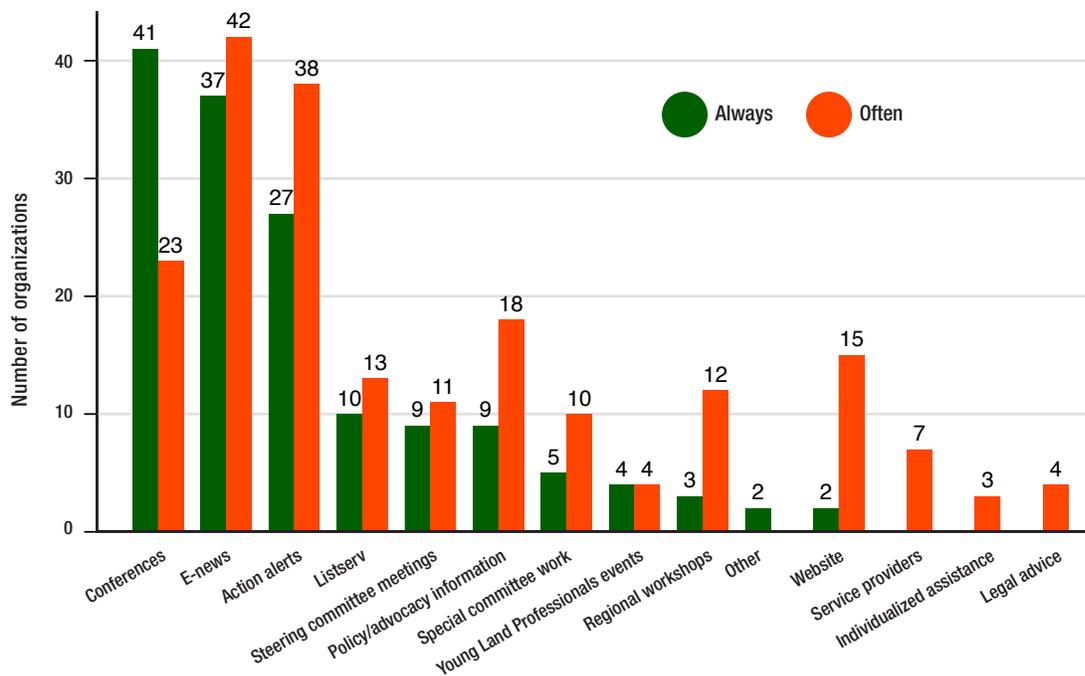


FIGURE 12. Use of MLTC services

103 valid responses



organizations. The diversity of land trusts presents a range of organizational opportunities and needs.

Educational Resources and Support. Among respondents, 91 percent report being members of the MLTC, and 70 percent report membership in the LTA. Respondents use a wide range of the education and support resources provided by both organizations. The MLTC services most used were the annual conference, the e-newsletter, and action alerts (see Fig. 12). The LTA services most valued were publications, online learning, and the national conference. Almost a quarter of responding land trusts have enrolled in the LTA Terrafirma conservation defense liability insurance program.

FIGURE 13. Non LTA-accredited organizations adopting LTA standards and practices in principle, by paid staff size

75 valid responses (of 84 not accredited)

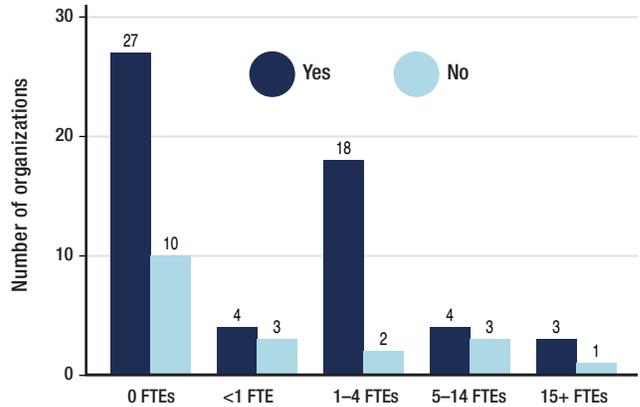
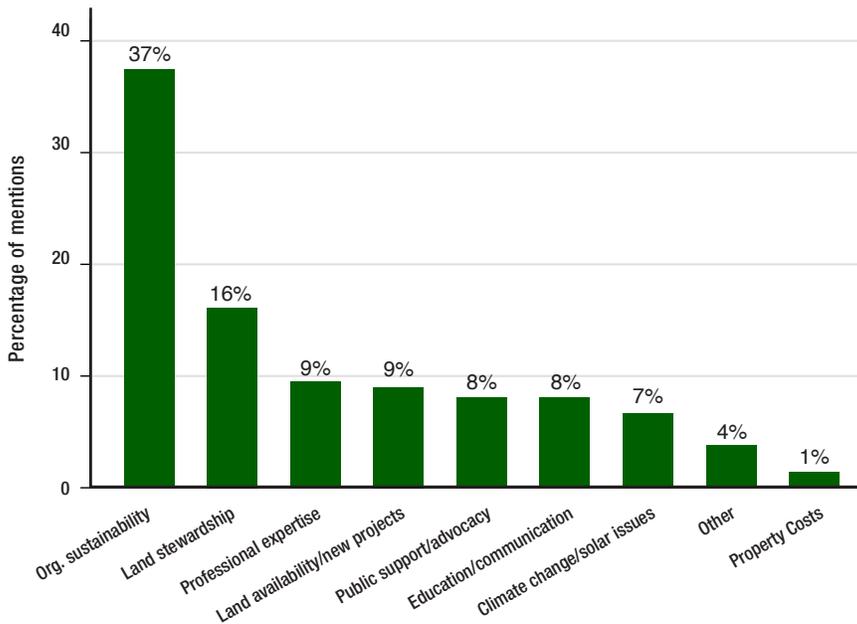


FIGURE 14. Challenges organizations are facing (excluding funding)

Category responses not mutually exclusive. 84 valid responses



“Our organization is very small and poorly funded. We have filled a gap and protected lands that would otherwise have been developed, and have a succession plan in place, but need new members.”

—SURVEY RESPONDENT

“I am proud to work in the Massachusetts conservation community, where so many different people work so collaboratively to protect so much important land.”

—SURVEY RESPONDENT

Organizational Sustainability. Organizational sustainability is a challenge reported by 37 percent of the responding land trusts (see Fig. 14). While the vast majority of respondents are confident that they will be protecting land in the future, a small handful of organizations are concerned about their viability.

Many respondents shared ideas for additional support they would like to see, including receiving technical assistance from more experienced land protection

specialists, mentoring between organizations, succession planning, helping the public and communities better understand and value land conservation, and sharing information and experiences through regional networking.

Policy Advocacy. Land trusts report diverse priorities for policy advocacy to support their work. State support, climate change, and local funding ranked as the top priorities for MLTC focus (see Fig. 15).

FIGURE 15. Priority policy areas for MLTC to focus

96 valid responses

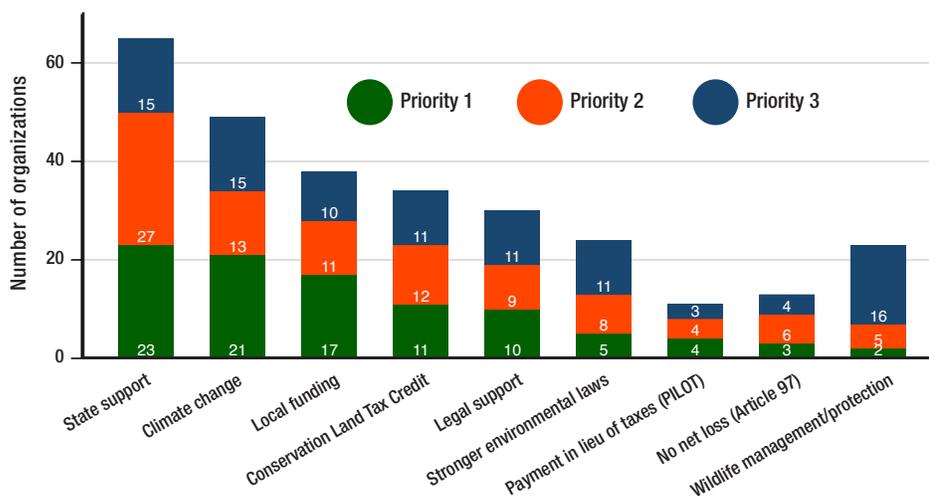




Photo: A skier enjoys prime conditions at The Trustees of Reservations' Notchview Reservation in Windsor. © Jerry Monkman

ACKNOWLEDGMENTS

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