New Challenges! New Opportunities!

President's Report Indicates Continuing Strong Support More Important Than Ever

by Rowan Wakefield

The outstanding way our members responded to our call for financial help last year buoyed me enormously. As a consequence, I'm very excited and encouraged about reaching our goals for this critical decade. You have made it possible for the Island Heritage Trust to enter a whole new phase of work on much needed projects we did not think would be possible a year ago.

The year 1990 marks the beginning of a decade of stepped up land protection for Deer Isle, Maine and the Nation. The Island Heritage Trust is now beginning to play a major role in this effort because of generous financial support of its members, totaling $17,400 last year, for which we are deeply grateful.

Many of today's new opportunities and challenges are propelled by powerful forces and trends:
- IHT is moving clearly into a new action phase of counseling land owners on conservation easements as more and more people recognize that IHT can help them preserve their family land in the face of skyrocketing inheritance, capital gains, income and property taxes.
- IHT is responding to needs of both the Stonington and Deer Isle governments as they work on their new comprehensive plans, mandated by the recent powerful state "managed growth" legislation. This involves primarily helping to develop scenic, historic and cultural inventories of land and sites for protection, and helping to plan affordable housing programs.

These actions are driven by larger forces of change in society:
- the growing national concern for the cleansing of the environment and protecting land from unwanted development. Signs of this include the huge response to the recent Earth Day observances, and the dynamic growth of the land trust movement. There are almost 1000 land trusts nationally and new ones are being created at the rate of one a week. Maine, with 61, is one of the leading states.
- the current slow-down in the real estate market, believed to be temporary. This not only is making more land available for protection, it is also providing a respite for organizing and strengthening the wide array of land protection organizations to take advantage of these opportunities.

To help create an environment in which the new land preservation ethic will take firm root and last, the IHT has been developing a land use curriculum for use in the local high school and elsewhere throughout the state. Copies of this Land Our Heritage curriculum are being distributed to other land trusts in May.

The beginning of the decade of the 90's has additional special significance for IHT. As this newsletter reports, we enter it with record high membership, record high financial

(continuation on page 2)

SPECIAL NEWSLETTER PURPOSE:

USES OF CONTRIBUTIONS

This second issue of our newsletter not only reflects our continuing rapid growth and development in Maine's land protection arena, but it also has a particular role to play.

It is a special report to all our members, who contributed a total of $17,400 last year. This includes our 300 regular members and the members of the Heritage Committee. This issue tells what we are doing with your support to usher us dramatically and forcefully into the 1990's with its serious land preservation challenges.

It is also an early reminder that before the end of the year we will need continuing contributions of at least $15,000 from our members and the Heritage Committee. This is for support of this year's program described in this newsletter, if we are to continue our critical land preservation work at the current expanded level expected of us. (See the budget report inside). I am pleased to report that we have received over $4,000 in support from members so far this year.
THE ISLAND HERITAGE TRUST, a nonprofit community service organization, was organized in 1987 in response to the growing state-wide concern about managed growth, especially along the coast, where increasing development pressures on the land and skyrocketing property values were creating major changes in traditional life and work styles and land uses.

Its geographic area of concern includes the towns of Deer Isle and Stonington, the 70 off-shore islands under their jurisdiction, and the islands under the jurisdiction of the State of Maine in Upper Penobscot Bay.

The Trust has a dual mission: public education in land stewardship, and service to land owners who want to preserve traditional land use with conservation easements or land donations to the Trust. The work of the Trust, at least, is to supplement and reinforce the work of state and local governments and other private organizations responding to these changes, in particular, to provide island-wide perspective and action.

Land, Our Heritage, the newsletter of the Trust, is published occasionally to keep members, friends and others interested in land conservation along Maine's coast abreast of the Trust's activities and needs, and to keep them and the public better informed on important actions and policy changes in the land conservation field.

For additional information on the Island Heritage Trust and its program, write P.O. Box 369, Stonington, Maine 04681, phone (207) 367-5950.

President's Report
(cont. from page 1)

support, and we are operating in an increasingly sympathetic environment. We are much better organized, have strong leadership, many committed volunteers and a strong board, and have a great deal more valuable experience than we did in 1987, when we were organized.

But our responsibilities are increasing at an even faster pace as we reach out to meet the exciting new opportunities and the more difficult challenges of the 1990's, helping to preserve the best of our Maine coastal heritage in a setting of healthy economic growth.

We cannot do this alone. We will work closely with other organizations whose goals we share. But most important, we need the continuing strong financial help of our members and our Heritage Committee, coupled with our own money raising efforts, including the sale of posters, postcards, tee-shirts and sweatshirts. We've set our course for the 1990's. Come join us by helping any way you can. We all share a common goal. The preservation of the coast of Maine we love.
1990 Program Priorities Overview

Our highly successful fund raising efforts have made it possible to take important strides in the following four areas where the Board of Directors in January set 1990 program priorities. Each of the following summaries is described at greater length on the following pages.

1
EXPAND COMMUNITY EDUCATION IN LAND PRESERVATION:

With the help of a grant from the Maine Community Foundation, our directors, Darcy Campbell and Stephanie Levy, have produced a superb, comprehensive curriculum guide on land use and managed growth based on six fictionalized local case studies of conservation easements. Because of the interest in the book throughout the state the Board is considering doing two versions, a shorter, simpler one for school use, and the longer, more comprehensive one for adult education.

In the broader area of public education, emphasis during 1990 will be on public meetings sponsored by the Trust on the tax advantages of land preservation.

2
COUNSEL MORE LAND OWNERS ON CONSERVATION EASEMENTS

The Board in January decided, now that we have sufficient funds, that we should immediately begin more systematic follow-up on referrals to land owners potentially interested in conservation easements. In doing this the Board agreed to expand the trust's work to include both:

1. land owners who traditionally grant conservation easements,

2. land owners with property, family-owned for several generations, who may be faced with the threat of losing their land because of its skyrocketing value. This is especially true of shore

This sketch is from our land use curriculum guide. Dick Myrick is the artist. A book of 30 of his sketches will be on sale this summer.

property with its sharply rising property taxes and potential astronomical capital gains and inheritance taxes.

To help counsel this latter group of land owners the Trust has applied for a grant from the Island Foundation to revise the best selling booklet, Preserving Family Lands by Stephen Small, to address their needs specifically.

3
WORK MORE CLOSELY WITH LOCAL GOVERNMENTS

The Board attached special significance to this program priority. Both the towns of Deer Isle and Stonington are working on state-mandated Comprehensive Town Plans which must deal with the preservation of scenic, historic, recreational, wild life and cultural (e.g., working waterfront) areas and sites. (See page 7 for a description of the procedure which has been worked out to develop these inventories to meet local government and Island Heritage Trust needs and state government requirements.)

The Board sees this clearly as an advantage to the community, to the local governments, and to the Trust.

4
SERVE AS A CATALYST FOR AFFORDABLE HOUSING

Since we are already discussing with two land owners the possibility of designating affordable housing areas in conservation easements, the Board has appointed a committee, headed by Charles Hance, to recommend the role for the Trust in meeting this obligation.

A Trust-sponsored meeting in May for public officials and the general public examined four issues: (1) how should affordable housing projects be managed; (2) what should be the process for selecting individuals or families for the affordable housing opportunities; (3) what should the building specifications be, e.g., energy efficient; (4) how can the lots be kept affordable in subsequent changes in residents.
CASE STUDIES

In the story format of the resource book, Land, Our Heritage, Gary Clauison, land trust representative, listens to the concerns landowners have about meeting their own and their family’s needs while protecting their land from the kind of development that could destroy its inherent value. He informs them about advantages and opportunities in placing their property under conservation easements. Below are excerpts from two case studies.

In the first excerpt, Case Two, Paul Carter is worried about having enough money to support and cover medical expenses for his wife and himself. He needs to sell at least some of his property, in his family for many generations, to provide income for his retirement years.

“First, consider how much money you need each year to meet your annual expenses and live comfortably,” Gary Clauison said, setting a mug of steaming coffee in front of Paul Carter. “How much money would you have to invest at the going interest rates to produce that amount in annual interest?”

“Bear in mind that if you sold your land outright to get the cash, you’d have to pay a lot of that to the government in capital gains taxes.”

Paul nodded, a sad and knowing look on his face. “I found that out when I sold that piece by the cove. I didn’t do my homework on that one.”

Gary smiled sympathetically at Paul. “Taxes are usually an unhappy surprise to us all. Even if you didn’t need to sell any land, and you were to leave it to your daughter unprotected, she’d be faced with exorbitant estate taxes.

“Let me explain how the conservation easement laws might help you. A qualified appraiser can evaluate your property, first the value for the most profitable use: that is, for development, whatever brings the highest price on the market. Then he computes the value of the land under a conservation easement, according to the limitations you would want to put on your land.

“The difference between the two figures is considered as your charitable gift donation for income and estate tax purposes, and the lowered value of your land means lower capital gains taxes—or lower estate taxes.”

Gary suggested these options to protect Paul’s land while getting him the cash he needs:

(see column far right)

LAND, OUR

(We asked Stephanie Mackay Levy, who, with Darcy Campbell, has designed and written the excellent Island Heritage Trust high school curriculum guide on land use and managed growth to give us a summary of the curriculum guide for the newsletter. The summary of the book, titled, Land Our Heritage, follows along with brief descriptions of two of the six case studies. The Editor).

The IHT curriculum resource book, Land, Our Heritage, presents six fictionalized case studies of land eligible for conservation easement, with chapter-end study questions and projects plus an appendix of excerpts from relevant law and other official documents of federal and state government and private, nonprofit conservation agencies. It is written as a dialogue between fictional Gary Clauison, land trust representative, and landowners, but much of the dialogue comes from actual conversations with landowners.

The basic issues illustrated in the book are: What is a conservation easement? Is there more than one kind? How long does it last? What rights belonging with the land does the landowner give up? What benefits does the landowner gain? What benefits does the public gain? Who can own the easement? What are the responsibilities of easement ownership? What are the different kinds of tax benefits resulting from donation of easements or land?

Each case provides a specific easement problem. Conservation and tax concepts are repeated from case to case to show how they may be applied in different situations.

Case One, in which a city council has given an easement on a public waterfront park to a land trust, introduces the idea that conservation easements are first and foremost for public benefit. Economic and political components are very briefly addressed.

Using as example three large headlands Downeast which were rescued in an effort spearheaded by the Maine Coast Heritage Trust, the second chapter describes generally how land trusts work to protect land from undesirable development, and how conservation efforts can improve rather than impede the economic vitality of a community.

Case Two deals with the financial dilemmas facing a retired owner of family shorefront property which has escalated in value. The chapter addresses the landowner’s specific land potentials and economic needs, with particular attention to tax considerations. Several types of ease-
ments are discussed: forever wild, limited development, limited public access, and affordable housing.

Case Three presents a dialogue about a lobster dealership owned by a family for several generations. Questions raised are whether the working waterfront is a scenic area of significant public benefit, and whether it is economically sound to limit property to a particular business use. Many of the concerns about easements and other conservation measures which have been expressed by long term Island residents are considered in this chapter.

In each of these cases, income, estate and capital gains tax benefits are explained, with slightly different emphasis, to help students understand what at first may appear to be complicated. However, important as tax considerations are to the conservation easement concept, other issues are often the primary motivation for landowners, as well as the actual basis for the conservation easement law.

Environmental benefits of conservation easements are addressed in Case Four, in which a forever wild easement protects land designated as having regional wildlife protection value. The understanding is that when the wildlife is protected, the longterm economic value for the fishing industry is also protected. Also considered in this chapter are the rights of the landowner and the responsibilities of the nonprofit conservation agency holding the easements.

In Case Five, what might be called ethical considerations of protecting the environment for public benefit motivate the easement donor. She wants to keep a personal commitment to making her land available to nature lovers, and she wants to protect the life that finds its home on her land. More detailed attention is given to the gathering of information to prepare the easement document.

The last chapter, Case Six, describes a situation in which the owner gives the land trust property rather than a conservation easement on the property. Again, this is land owned by the same family for generations, and includes a house of historical value. The owner has no heirs, and wants to protect the house and the land from development so that they may continue to be available to the public for traditional uses and for education.

The purpose of the book is to raise questions about the future of our land resources and to provide the facts, with illustration and explanation, which affect that future, positively and negatively. The dialogues show what motivates people to donate easements on their property. Designed as a source book, it contains a glossary of terms and a bibliography.

- Place easements on the land before selling any of it, in order to have some control over the manner in which it is used or developed.
- Keep the family home and some land for himself under a homestead easement.
- Reserve a parcel overlooking the water for a single family home, either for his daughter or for later sale.
- Place a "forever wild" easement, possibly with nature trails for limited public use, on a visible and beautiful portion.
- Sell some buildable and attractive land to a developer, after setting reasonable conditions in a limited development easement.

In the second case study excerpt, Case Six, Louise Hatcher, an elderly widow without heirs, wishes to donate her house and property to the land trust. Gary Clauson, land trust representative, describes options to her.

Mrs. Hatcher explained how she felt to Gary Clauson. "The property was left to me by my parents. I believe that land is given to us in trust, and we have a responsibility to it. We should share what we have been fortunate enough to receive. I have considered a 'reserved life estate,' where I can donate the land to the land trust, but use it until I die. It would be simpler to give the property now. How would you use the land I plan to donate?"

"We would restrict the recreational uses to walking and picnicking and similar low-impact activities, to protect the natural environment that thrives at present," Gary answered. "Two lots along the road frontage could be placed under a limited development conservation easement, with restrictions to require their use for affordable housing for qualified buyers."

Mrs. Hatcher had something more to say. "I would like to leave my house to some nonprofit organization involved with environmental science or the arts. It's one of the earliest in the area. I'm afraid that if I don't do something to protect it, the next owner might tear it down and build one of those modern houses."

"Have you considered a historical conservation easement for your house?" Gary asked. "You could protect the house itself, and still leave it to be used as you wish to an organization such as you mentioned."
Thanks to the generous financial support of our members we now have the staff, time, and money, and a directive from our Board to step up the pace of counseling land owners on easements.

We have already learned that the process of receiving and designing easements is a very individual matter, which can take several months, even years. What is most important is meeting the needs of the land owner.

We signed our first conservation easement in December with Bob and Sherrell Jacobson for eight beautiful acres of shore property in South Deer Isle. Ellie Pavlov's interest in granting us a much larger forever wild easement on Goose Cove has several complex elements requiring time and research. She hopes to have the legal and other issues worked out by early summer. In both these cases we are grateful to the Maine Coast Heritage Trust for assistance with their expertise and experience.

Interest Rises, Work Pace Increases

We are seeing a growing interest on the part of land owners for information on conservation easements. Since the beginning of the year at least a half dozen have approached us with questions about possible easements. Now that Stephanie Levy is working almost half time on this project, we are actively following up. In addition, the Town of Stonington has identified areas of scenic value and asked for our help. Stephanie has advised land owners in these areas of the tax advantages of protecting the land from undesirable development. We have also been following up on earlier leads.

The reasons for this increased land owner interest are threefold:

(1) As pressure on land, especially shore property, continues to grow, despite the current real estate lull, land owners are becoming increasingly concerned about this and the resulting tax implications.

(2) There is an increasing awareness, locally, throughout the state and nationally, of the need for protection of land, especially coastal land, for its scenic beauty, wildlife habitat, recreation, historic sites, public access and traditional farming and fishing uses.

(3) There is a growing recognition that the Island Heritage Trust is here, staffed with knowledgeable local people to help local land owners and the local governments according to their specific needs.

No one organization can begin to carry the whole load for local land preservation. We need everyone's help. You can help. Let us know of land owners who need help or might just be interested in learning more about conservation easements.

The Island Heritage Trust received its first conservation easement last December from Robert and Sherrell Jacobson, South Deer Isle summer residents.

The beautiful 8.5 acres, now permanently protected, at the head of a small cove off of Inner Harbor, forms a microcosm of much of the island: a traditional small-scale salt water farm, a unique scenic view, diversity of flora and fauna, orange granite outcroppings along the south shore, a fringe of high and low salt marsh through which a tiny stream flows, clam flats, a retreating pasture, and a small mixed hardwood and spruce woods.

That coastal area has been designated a Class B wildlife habitat in the Penobscot Bay Conservation Plan. The forever wild half of the easement will have a nature trail so that it can be used as a laboratory by the high school students and teachers in their new managed growth/land use curriculum. The homesteading easement on the other half of the land prohibits buildings, other than the Jacobson's existing home.

Most of the negotiation and drafting of the easement was done with the extensive help of Patty Ryan of the Maine Coast Heritage Trust, to whom we are very grateful.

The Jacobsons, who have been coming to Deer Isle during the summers for many years, feel deeply about preserving the unique, unspoiled beauty of the island. They have fled several times with their family from excessive development, which they have seen spoil Staten Island after the Veranzano bridge opened, then Bucks County, Pennsylvania, and is now beginning to reach their latest home in southern New Jersey, where they thought development would never come.
LOCAL GOVERNMENT INITIATIVES

WORK WITH LOCAL GOVERNMENTS FOCUSES ON COMPREHENSIVE PLANS

In January, the Island Heritage Trust Board, encouraged by the high level of financial support by members last year, gave cooperative work with the Deer Isle and Stonington town governments a new program priority. Specifically the Trust was directed to find out how best it can contribute to the development of scenic, historic, and cultural inventories required by the state for each of the town's comprehensive plans. Such inventories are also needed as a guide for the achievement of the Trust's mission.

Stonington has been designated as a Tier 1 town by the state and must have its comprehensive plan and supporting ordinances completed by 1991. It has a greater sense of urgency because its building moratorium ends July of this year. Deer Isle is a Tier 2 town and must have its comprehensive plan completed by 1992.

Plans have been completed to carry out this IHT project in the following steps, much of it this summer with the help of an intern under the direction of Stephanie Levy and Rowan Wakefield. The time estimated to carry out each step is indicated.

1. Prepare an inventory of completed state and local scenic inventories and public opinion surveys. The first stage of this task has been completed by the IHT, and the Stonington Planning Commission has already found the list useful. Significant information for use by the two towns and the IHT must now be pulled from this raw data. (One week.)

2. Work with the Deer Isle Historical Society officials and materials to list already determined historical sites on the whole island and off shore islands. (One week.)

3. Design and conduct a random sampling of Stonington and Deer Isle residents to obtain from a cross section of the population a valid consensus of lands and structures to be protected. (Two weeks.)

4. Organize and integrate data from steps 1, 2 and 3, adding new data, (e.g. sites affected by the new state watershed protection criteria), and other opinions needed to fill gaps or to clarify, especially by the local governments.

5. Undertake, in cooperation with the two towns, an actual photographic tour of the whole island (including off-shore islands), recording sites and structures which have emerged from the above steps. (Two weeks.)

End Product

When this project is completed later this year:

- The two towns will have lists with descriptions of land and buildings to be protected for incorporation in their state-mandated land use planning work. The process proposed for identifying these resources to be protected will get careful scrutiny by the state before approval. We have every reason to believe the process proposed here will meet state standards.

- IHT will use these lists as priority guides for counseling land owners regarding donations of conservation easements and land parcels. The lists will also be useful as the IHT responds to requests by the towns to protect areas designated for conservation.

Paralleling this effort, our field representative has been taking part in meetings of the State Planning Office's Critical Areas Program Committee, which is sponsoring a workshop for Hancock County of land use organizations. This workshop is designed to determine the scenic criteria for the area.

NEGOTIATION NEARING COMPLETION FOR GOOSE COVE TRAILS EASEMENT

Eleanor and George Pavloff have been proceeding systematically toward completion of a conservation easement to protect the trails on Deer Isle between Goose Cove Lodge and Barred Island, which the Nature Conservancy owns.

A draft of the easement is being prepared by Patty Ryan, Maine Coast Heritage Trust field representative. The Island Heritage Trust will be the holder of the easement. It is not definite at this time, but the possibility of having a provision for affordable housing is being discussed.
"Preserving the best of today for tomorrow"

These photographs were generously provided by two Deer Isle photographers: Above, black and white original © David Klopfenstein; Below and right, from color prints by Terrell Lester.
AFFORDABLE HOUSING

The skyrocketing values of Maine coastal land is creating serious housing problems for many working parents and their children up and down the coast, especially in southern Maine and places like Bar Harbor. But the urgent need for affordable housing is being felt everywhere, including Deer Isle and Stonington. Indeed the state has mandated that all towns' comprehensive plans provide for affordable housing, at the very least in trailer parks.

The Island Heritage Trust is becoming very much involved. On one hand, land owners are approaching the Trust about setting some of their land aside in conservation easements for affordable housing. On the other hand, both the town governments look to the Trust to help secure land or easements for affordable housing.

Under Charles Hance, the Trust is setting up a committee to determine what other communities are doing that would be applicable to Deer Isle and Stonington. We don’t want to reinvent the wheel. We are planning a meeting in May for local officials and the public to examine three basic questions:

1. What administrative organization would be appropriate to manage affordable housing projects;
2. What selection procedure appears appropriate for us to determine who should have access to affordable housing lots;
3. What building specifications, e.g., energy efficiency, seem desirable for any affordable housing program we develop; and
4. How can we keep the lots affordable when ownership changes in the future?

For suggestions and additional information call Charles Hance at 348-2883.

---

ISLAND HERITAGE TRUST POSTER FOR SALE

We will again be selling our color poster of the above beautiful photograph of Stonington Harbor at Sunrise, by fine arts photographer, Terry Lester, of Deer Isle. The 21 x 28 inch poster sells for $15 unsigned and $25 signed. Its publication was made possible by a gift from the Elizabeth Cheney Foundation and gifts in memory of Donald Libby. Money raised in selling the poster helps support the work of the Trust. The next in this Land, Our Heritage poster series is planned for 1991.

This Land, Our Heritage poster may be ordered by mail from the Trust (see order form on inside back cover). It may also be purchased at the Trust’s Main Street Stonington office, from many galleries and inns in the area, and from Terry Lester’s Mountainville gallery in Deer Isle.
Meetings and Conferences

1989 Maine Conference of Conservation Land Trusts

The Island Heritage Trust was represented at this important annual conference on November 14 at Readfield, by Tony Landreau, Stephanie Levy, Rowan Wakefield, and Jean Welch. Important tax and legal issues were discussed, and brochures, program descriptions and other publications and posters were available at the various land trust booths. The conference also offered an opportunity of meeting and exchanging views with a wide variety of other land trust representatives.

Building Consensus Land Trust Conference

Directors Babette Cameron, Stephanie Levy, Jean Welch and Rowan Wakefield, and Executive Director Tony Landreau took part in an all day Land Conservation conference, January 13, sponsored by the Kennebec Land Trust, the Maine Coast Heritage Trust, the Mainewatch Institute, and the Maine Municipal Association, hosted in Augusta by Central Maine Power. The theme of the conference, which brought together almost 100 Maine land trusts and other conservation organizations with developers, was “Building Consensus and Setting Priorities Together."

Preserving Family Lands

On January 12, Stephanie and Tony had an opportunity to take part in a small meeting/workshop in Brunswick with Stephen Small, author of Preserving Family Lands, one of the two most used books by land trusts. Both found the opportunity very rewarding.

Future of MCHT

Stephanie Levy and Tony Landreau have been representing the Island Heritage Trust at a series of meetings of Maine land trust staffs to define the most helpful role of the Maine Coast Heritage Trust in the context of the rapidly growing and maturing land trust movement. In the framework of the changing relationship of the MCHT to its 61 member land trusts, the following topics are being considered: fund raising, information clearing house functions, environmental planning, political action, legal services, and major land acquisitions.

Scenic Conservation Workshop

Tony Landreau and Stephanie Levy have also been representing the Island Heritage Trust at a series of meetings of a state-sponsored Scenic Conservation Workshop. Its aims are to (1) focus attention on scenic conservation and planning in Maine, (2) bring together professionals and volunteers interested in scenic conservation, (3) address key issues concerning scenic conservation in Maine, (4) illustrate examples and issues of scenic conservation through case studies, (5) learn about the English approach to landscape conservation and consider using it in Maine, (6) set direction for scenic conservation in Maine for the 1990's, (7) test the critical area designation of scenic areas, and (8) work with towns undergoing comprehensive planning. As part of this work Tony and Stephanie will be collaborating with Annette Nagel of the Island Institute in Rockland on “an island event.” For this an island in Merchant’s Row would be chosen for a scenic case study visit.

The Maine Village and Growth

Tony Landreau represented us at a March 5 meeting in Newcastle on techniques of preserving open space in the face of development through cluster housing and other means. The meeting topic was the Maine Village and Growth. It was sponsored by the Georges River Land Trust, the Damariscotta Land Association, the Pemaquid Watershed Association, the Boothbay Land Trust and the Lincoln County Planning Office.

We are also attending as many meetings as possible of the Deer Isle Planning Board and the Stonington Comprehensive Planning Commission, and, by invitation, meetings of the Regional Planning Board in Ellsworth, which will be reviewing all the comprehensive plans of Hancock County's towns.

Computer Volunteer Needed

We hired Bob Tredwell of Brooksville to design and operate our membership/mailing list/fund raising database. Bob has done this very effectively and is willing to continue.

He has also offered to write a piece of custom software for us that would allow us to maintain our own mailing list and fund raising records on any MS-DOS machine. We would like to hear from any member who would be interested in doing this. Bob is a leading authority on database management. Learning from him would be a valuable opportunity for anyone.
BUDGET NOTES

The Board has approved a $37,400 expenditure budget for 1990, a 76 percent increase over 1989. The largest increase goes for stepped up work on conservation easements. Next largest is for expanded community involvement and services, much of this being for closer cooperation with local governments on work on their state-mandated comprehensive plans. Both these program areas were moved into top priority by the Board at its January meeting, as a result of the generous support during 1989 of members and the Heritage Committee.

For this year $39,625 is projected to be raised: $8,625 from the sale of sweatshirts, tee shirts, posters, and post cards; $31,000 in anticipated contributions from members and the Heritage Committee (a 17 percent increase) and $1,500 is from the sale of platinum coins donated to the Trust last year.

$13,000 of the $50,477 budgeted for 1990 must be carried into 1991: $3,800 in the revolving fund for the 1991 poster, and $9200 in the bank to start the year, since the major fund raising activity is in the fall. This leaves $about 37,400 for expenditure for 1990. That $37,400 is allocated as follows:

**Expanding Land Protection $14,750**

The largest item in this program, $6,250, is for paying our new field representative, Stephanie Levy, primarily for counseling land owners and helping negotiate easements. Legal fees are budgeted at $3,100, and $1,000 is set aside for our new legal assistance fund. Also $1,000 is earmarked as our contribution to the Island Institute for the purchase of Russ Island, off Stonington, if we raise all the funds projected for 1990. The remainder of the expenses are for easement monitoring, purchase of reference materials, meeting attendance, and administrative costs.

1990 BUDGET APPROVED

**INCOME**

<table>
<thead>
<tr>
<th></th>
<th>1989</th>
<th>Projected 1990</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bank balance at beginning of year</td>
<td>$4,500</td>
<td>$9,127</td>
</tr>
<tr>
<td>Sale of posters</td>
<td>4,500</td>
<td>4,500</td>
</tr>
<tr>
<td>Sale of sweatshirts</td>
<td>1,800</td>
<td>2,000</td>
</tr>
<tr>
<td>Sale of tee shirts</td>
<td>—</td>
<td>1,500</td>
</tr>
<tr>
<td>Sale of post cards</td>
<td>—</td>
<td>625</td>
</tr>
<tr>
<td>Support from Members</td>
<td>11,400</td>
<td>16,000</td>
</tr>
<tr>
<td>Support from Heritage Committee</td>
<td>6,000</td>
<td>15,000</td>
</tr>
<tr>
<td>Foundation Grant</td>
<td>2,000</td>
<td>—</td>
</tr>
<tr>
<td>Interest</td>
<td>—</td>
<td>225</td>
</tr>
<tr>
<td>Sale of Platinum Coins</td>
<td>—</td>
<td>1,500</td>
</tr>
<tr>
<td><strong>TOTAL</strong></td>
<td><strong>$30,211</strong></td>
<td><strong>$50,477</strong></td>
</tr>
</tbody>
</table>

**EXPENSES**

<table>
<thead>
<tr>
<th></th>
<th>1989</th>
<th>1990</th>
</tr>
</thead>
<tbody>
<tr>
<td>Expanding land protection</td>
<td>4,796</td>
<td>14,750</td>
</tr>
<tr>
<td>Expanding community involvement and service</td>
<td>797</td>
<td>9,550</td>
</tr>
<tr>
<td>Fund Raising</td>
<td>7,002</td>
<td>6,600</td>
</tr>
<tr>
<td>Administration</td>
<td>8,537</td>
<td>6,500</td>
</tr>
<tr>
<td><strong>TOTALS</strong></td>
<td><strong>$21,132</strong></td>
<td><strong>$37,400</strong></td>
</tr>
</tbody>
</table>
Expanding Community Involvement and Services $9,550

Helping the towns develop scenic, historic and cultural inventories accounts for more than $5000 of this program. It is to pay for the services of our field representative and a summer intern. Completing the high school land use curriculum project is budgeted at $1,800; conducting public meetings, workshops and seminars will cost $1,200. The balance is for getting the affordable housing work started, and administrative costs.

Fund Raising $6,600

Postponement of a new poster, which cost $3,838 in 1989, accounts for the reduction in fund raising expense for 1990. The production and sale of tee shirts and a post cards, new this year, added to the cost of production and sales of sweatshirts, is about $2,000 more than was spent last year on sweatshirts. Other items include the publication and mailing of the newsletter, printing and mailing of fund raising materials, maintenance of the mailing list, and administrative costs.

Administration $6,500

Our part-time executive director worked for us only the first quarter of 1990. This accounts for most of the reduction in administrative costs. New expenses this year are the cost of an accountant and bookkeeper and the administrative secretary for the full year.

The cost of rent, telephone, postage, insurance, supplies, copying, and service to the copier at $2,500 is slightly higher than last year. New this year is the $500 budgeted for payment of sales tax and income tax on unrelated business income (posters and sweatshirts).
HERITAGE COMMITTEE TO CONSIDER ANNUAL BUCKMINSTER FULLER AWARD

The role of the Heritage Committee as a special support arm of the Island Heritage Trust will be the subject of a planning meeting to be announced the end of June or early July, in Deer Isle. The meeting will be chaired by Andrew Fuller of Deer Isle.

Heritage Committee members are people who help advance the Island Heritage Trust toward its land preservation goals in some significant or special way. This help ranges from significant financial contributions to special assistance in carrying out projects.

The major function suggested for the Heritage Committee will be to sponsor an annual Buckminster Fuller Maine Coastal Award for outstanding achievement in the preservation of the land and marine heritage of coastal Maine.

“There is a real danger that a whole new generation of Americans will never know or share Buckminster Fuller’s vision of managing the earth’s resources in ways that create peace and plenty,” Rowan Wakefield, Island Heritage Trust president, said in suggesting this proposed award.

“Buckminster Fuller loved his summer homes at Sunset on Deer Isle and on Bear Island with their beautiful settings and relatively unspoiled environments, enjoyed continuously so far by four generations of the Fuller family.”

“In addition, the current local lull in development and the vast restaging of the world’s political and environmental scenes suggest a sense of historic opportunity,” Rowan said.

“We are especially fortunate to have Andy Fuller take the leadership in chairing this planning meeting of the Heritage Committee. Andy owns and lives in the Buckminster Fuller home in Sunset. He has a deep love of this area, where he has spent much time since childhood. And he cherishes a special relationship with Buckminster Fuller, his uncle, who served in many ways as his father, when his own father died when Andy was young,” Rowan added.

Commenting enthusiastically on the proposed award, Andy emphasized, “It is especially fitting to create this award at this time for several reasons:

• to keep alive the memories of Buckminster Fuller in this area as an inspiration to all, especially young people, and

• to draw on his ideas and teachings to help solve some of our local environmental, managed growth and affordable housing problems.”
News and Notes

New Publications

Available to purchase or borrow from the Island Heritage Trust Office in Stonington are:

• The updated third edition of The Landowners Options: a guide to voluntary protection of land in Maine, published by the Maine Coast Heritage Trust.
• Maine Coast Heritage Trust Technical Bulletins No. 104 on Conservation Easements and Property Taxes, and No. 110 on Conservation Easements: Questions and Answers.
• The most recent updated version of Appraising Easements, the best-selling authoritative guide published by the Land Trust Alliance.
• Combining Affordable Housing with Land Conservation, Dodson Associates.
• Creative Land Development: Bridge to the Future by Robert A. Lemire, cited by the Nature Conservancy as “a valuable tool for landowners, planners, developers, officials — everyone involved in the conflict over resource land — everyone struggling to build better communities.”
• We also have more than 20 maps and several publications from the Islesboro Islands Land Trust prepared are part of Islesboro’s comprehensive planning process in which the Trust played a key role.

Other Publications

We still have some extra copies for sale or loan of the two basic conservation easements references we use all the time:

• The Conservation Easement Handbook by Janet Diehl and Thomas Barrett, published by the Land Trust Exchange and the Trust for Public Land. ($19.95)
• Preserving Family Lands: A Landowner’s Introduction to Tax Issues and Other Considerations by Stephen Small, ($6).

Volunteers Honored: Needed Again for the Summer

Volunteers played an invaluable role last summer helping us to run the Island Heritage Trust office on the Main Street of Stonington. In September, 18 volunteers were honored at a ceremony hosted by Jackie Binnian, who as our associate for operations, did a magnificent job in coordinating all the volunteer activities.

Honored at the ceremony last September were:

Marge Adams, Charles Crowder, Lucia Donovan, Ruth Evans, Bob & Ruth Harris, Sally Harrison, Claire Knight, Helen Lounsberry, Peg Myers, Stephanie Levy, Pam Pace, Fran Peterson, Doris Schoonmaker, Barbara Seymour, Margaret Sibley, and Jean Welch.

As a token of our appreciation all received copies of our Land Our Heritage poster of Terry Lester’s spectacular photograph of Stonington harbor at sunrise.

Much to her surprise, Jackie was presented with the president’s new Volunteer of the Year award in recognition of her hard work, valuable time and dedication to helping the trust achieve its goals.

Volunteers will again be needed this summer, not only to help run the office, but also to assist with some of our summer projects. Jean Welch, our administrative secretary, will coordinate volunteer activities. Orientation for volunteers will take place the latter part of June and again in early July.

We would welcome hearing soon from anyone interested in volunteering to help this summer. If you think you might be interested, let us know. You can use the form on the inside back cover of this newsletter.
New Field Representative Helps Trust Move Toward Goals

Stephanie Levy, consultant on the curriculum project, has accepted the part time job of field representative in which she is counseling more land owners on conservation easements and assisting local governments. The generous support of members of the Heritage Committee last year have helped make this possible.

To these ends, she has been meeting with land owners. A progress report will be made at the annual meeting in July. President Rowan Wakefield and she will also supervise the summer intern we hope to have to work on revising Preserving Family Lands. Responding to requests from the Stonington Comprehensive Planning Commission, she has communicated with land owners describing the tax advantages of conservation easements to protect land in implementation of the town's comprehensive plan.

Stephanie has met with representatives of the Deer Isle Planning Board and the Stonington Comprehensive Planning Commission and with Rowan to work out the procedure for developing the state-mandated scenic, historic and cultural inventories referred to above and described on page 7.

In short, the opportunity of employing Stephanie in these capacities has been an important and valuable step in the expanding role of the Trust. The Trust is deeply grateful to all our supporters who have made this possible.

By Terrell Lester

New Accounting System

Beginning January 1 the Island Heritage Trust went on a new bookkeeping system, recommended by our new accountant, Ken Foster, CPA, of the accounting firm of Foster, Carpenter, Black & Co. of Bangor and Bucksport. Ken will supervise the system and prepare our tax returns. Under the system we keep a cash receipt journal and a cash disbursement journal using our new one-write checking system. Doris McCorison of Stonington, whom we have hired as a part time bookkeeper, will prepare quarterly and annual financial reports.

Posters and Sweatshirts for Sale

Our popular "Land Our Heritage" poster of Terry Lester's photograph of Stonington harbor at sunrise will again be available for sale this summer. Proceeds go to support the work of the trust. The poster sells for $15 unsigned and $25 signed.

We need volunteers to help take the posters around to stores and galleries in the area.

Sweatshirts with a new version of Persus Weirs' painting of the Deer Isle bridge at sunset will again be on sale for $20, with proceeds going to support the work of the trust.

Tee shirts will be added this summer.

We will also have a post card version of Terry Lester's photograph of Stonington Harbor at Sunrise that appears on the poster.

There is an order form for posters and sweatshirts on the inside back cover of this newsletter. They will also be available in the Trust's office on the Main Street of Stonington this summer.
Legal Assistance Fund Approved

At the request of our Board, one of our attorneys, George Eaton of Bangor, reviewed our proposed legal assistance fund and found that it would not jeopardize our tax exempt status.

The purpose of the fund, toward which up to $1000 is earmarked from this year’s budget, is to help cover legal fees of land owners who might not otherwise be able to pay for such help when they seek to determine the advantages and disadvantages of various easement options we propose for them.

Staff Changes

Part-time executive director, Tony Landreau, will be moving late in the summer to complete his doctoral work at Temple University in Philadelphia. He has agreed to be on call for specific assignments. However, Rowan Wakefield is now able to spend more time on trust business and assume many of Tony’s responsibilities along with part time administrative secretary, Jean Welch, and a part time paid field representative, Stephanie Levy. While Jean was vacationing in Florida this winter, Ethel Clifford of Deer Isle, covered for her.

New Affiliations

The Island Heritage Trust recently became a member of the Natural Resources Council of Maine in Augusta and a full-fledged member of the Land Trust Alliance in Alexandria, VA, formerly the Land Trust Exchange. Through the latter we have been able to secure an extensive liability insurance policy, which covers any easements we receive.

Marine Habitat Survey

We are pleased to report that one of our directors, Susan Woodward of Stonington, a wildlife biologist, and 18 local volunteers are in the process of carrying out a survey and census of the Maine coast to identify significant marine wildlife habitat areas. The study concentrates on shorebirds, but includes a study of special wildlife features in wetlands and along the coast. This includes bald eagle and osprey nesting sites, great blue heron colonies, eider molting sites, and seal haul-out sites, according to a report in the Island Advantages.

Trust Receives Platinum Coins

Heritage Committee member, J.R.G. Harris of Southberry, Connecticut, surprised all of us at the September ceremony honoring volunteers by presenting the Trust with a collection of four platinum coins commemorating the Olympics in the Soviet Union. We have permission to sell the coins, which weigh one and a half ounces each. We are deeply grateful to Robert for his generosity.
New Logo

The Island Heritage Trust is deeply grateful to Fran Merritt, retired director of Haystack, for the design of our new logo. The bridge is featured as a symbol of both the towns of Deer Isle and Stonington, and, in a larger sense, linking the island to the mainland in a shared concern for preserving Maine's land and sea heritage. It also suggests the strength of the burgeoning land trust movement, supporting the growing state and national concerns for land preservation and balanced growth.

Summer Intern Housing Needed

For the first time the Island Heritage Trust is planning to enlist the help of student interns during the summer season and into the fall. They will work with the staff, officers, directors and volunteers on several projects, including the development of scenic, historic and cultural inventories and the rewriting of Preserving Family Lands.

We have let the College of the Atlantic in Bar Harbor and Unity College in Unity know of our needs, and we already have an inquiry from a Unity candidate who is majoring in environmental communications. In addition, our internship program is listed in the national Environmental Internship Directory.

We may need housing for one or two interns and would welcome offers from members or any one interested in helping. Please get in touch with Rowan Wakefield, Trust President, at (207) 367-5950 or at his home (207) 348-6400.

IHT Helps Launch Penobscot Bay Land Trust Association

Rowan Wakefield, Island Heritage Trust President, helped found and chaired the initial two meetings of the newly formed Penobscot Bay Land Trust Association.

The objectives of the Association are: (1) to exchange useful information, (2) to provide an informal forum for education and training of members and the public, and (3) to develop cooperative projects as needed. Cooperative projects being considered include the establishment of a computer network linking the trusts with the Island Institute as network central, and developing a contingency plan in the event of an oil spill in Penobscot Bay.

The second two meetings are being chaired by Steve Miller of the Islesboro Islands Trust. Trusts with a shared interest in Penobscot Bay are, in addition to the Deer Isle and Islesboro trusts: the Blue Hill Heritage Trust, the Castine Conservation Trust, the Belfast-Lincolnville-Northport Land Trust, the Camden/Rockland Land Trust, the Georges River Land Trust, the Vinalhaven Land Trust, and the Isle au Haut Land Conservation Trust. Invited to all meetings as non-members are representatives of the Maine Coast Heritage Trust and the Island Institute.
Can You Help?

I would like to do volunteer work for the Island Heritage Trust, in particular:
- Help staff the Stonington Office
- Help with mailings
- Help distribute post cards, posters, sweatshirts
- Help write for the newsletter and other publications
- Help monitor conservation easements
- Help make and maintain nature trails
- Helping host social functions
- Serve on one of the Committees (see page 2)
- Provide housing for a summer intern
- Assist with development of scenic, historic and cultural inventories
- Assist the Field Representative in counseling land owners
- Other (please specify):

I will contribute $____ in 1990 for support of the work of the Island Heritage Trust. (I have already donated $____).

Your gift is tax deductible in accordance with the latest tax legislation.

Please send information on the work of the Island Heritage Trust to:

Name:
Address:
Town: State: Zip: Phone:

ORDER FORM

Please send me the following:
- ____ signed copies of the "Land, Our Heritage" Poster at $25.00 each (see description on page 10)
- ____ unsigned copies of the "Land, Our Heritage" Poster at $15.00 each
- ____ Island Heritage Trust/Deer Isle Bridge Sweatshirts at $20.00 each
- ____ Island Heritage Trust/Deer Isle Bridge Tee-Shirts at $10.50 each

Please add $4.00 for each poster and $3.00 for each shirt shipped. (Items may be picked up at the IHT office in Stonington.)

Enclosed is my check in the amount of $______ for:
- ____ Membership $10.00
- ____ Contribution $____
- ____ Posters $____
- ____ Sweat shirts $____ (S M L XL)
- ____ Tee Shirts $_____ (L XL)

Name: ____________________________________________________________
Address: _________________________________________________________
______________________________________________________________
Town: ______________ State: ___ Zip: ____________

Return to: Island Heritage Trust, P.O. Box 369, Stonington, ME 04681 (207) 367-5950
ANNUAL MEETING, JULY 25

This is an official announcement of the fourth annual meeting of the members of the Island Heritage Trust Corporation to be held at 7:00 p.m., Wednesday, July 25, at the Deer Isle/Stonington High School. The meeting is open to the public. The agenda follows:

President's Report
Treasurer's Report
Fund Raising Report
Program Progress Reports
Land Use Curriculum
Working with Land Owners on Easements
Cooperative Work with Local Governments
Affordable Housing
Year's Meeting Schedule
Election of Officers and Directors
Other Business

Island Heritage Trust
P.O. Box 369
Stonington, ME 04681

Forwarding and Return Postage Guaranteed
Address Correction Requested