

# ForumJournal

FALL 2010 | VOL. 25 NO. 1

## Bridging Land Conservation and Historic Preservation



# Lessons for Land Conservation

VALERIE TALMAGE

People who are engaged in historic preservation and land conservation share similar goals. Both preservationists and conservationists sign on to “protect community character,” “improve quality of life,” “preserve heritage,” and “keep important places for future generations.” The natural and cultural resources that preservationists and conservationists care about often occupy the same ground—yet

preservationists and conservationists tend to work in parallel. Although there are

inspiring examples of preservationists and conservationists working together to save special places, these instances seem to be the exceptions and not the rule. Improving the likelihood that preservationists and conservationists will unite for comprehensive community preservation will give both groups a better chance of achieving their overlapping goals.

## SEPARATE SILOS

Preservationists and conservationists have each developed specialized expertise—and that specialization results in a tendency to operate inside their separate information silos. Frequently a successful conservation project will conclude but leave historic features on the land unpro-

tected. Similarly, a preservation project will end with no thought to the permanent protection of the land. Sometimes preservationists and conservationists may even independently work to protect the same piece of real estate without knowing the others’ interests and actions.

The information silos are reinforced by years of training in specialized fields with little overlap—say, architectural history and rare plant biology. The biol-

**PRESERVATIONISTS AND CONSERVATIONISTS have each developed specialized expertise—and that specialization results in a tendency to operate inside their separate information silos.**

ogist is as unlikely to be able to “see” a building as old or significant as is the architectural historian able to “see” a weed as a species of concern. Only a rare individual can, with equal expertise, identify an endangered species, recognize the character-defining features of a historic house, and identify a stone as a Native American tool. Also rare is the individual who understands the difference between a National Register and a local historic district and who can also explain the tax advantages and requirements of a bargain sale of a conservation easement. Developing mastery of either preservation or conservation requires significant investment in learning subject matter, processes, and programs along with developing networks to support



In traditional farms, like this one in Westport, Mass., the history and significance of the buildings and land are inextricably linked.

PHOTO COURTESY PRESERVE RHODE ISLAND

success. Commanding expertise in both fields is not common.

Ironically, the world doesn't sort natural and cultural resources into neat categories. At least in New England, finding a parcel of land that does not contain traces of human use and settlement is rare indeed. If we are to protect the character of the communities where we work, live, and play, a combined approach to preserving both natural and historic resources is mandatory.

### DIFFERENT DRUMMERS

Preservationists and conservationists both work to save places that matter to communities, but they use different tools and strategies. They even evaluate success in different ways. Four fundamental

differences in approach have a profound effect on shaping the programs and activities of each specialty:

**1. Relationships with Owners:** The conservation community knows that its success lies in reaching voluntary agreements with owners—negotiating with owners to sell or donate conservation land or easements. Therefore, conservationists build relationships with owners and hone skills in negotiation. Land conservation groups consciously distance themselves from regulatory oversight and advocacy, keeping avenues to talk with landowners open and uncolored by advocacy positions. In contrast, preservationists are accustomed to advocating for and relying on governmental

*continues on page 16*

## Ten Ways for Preservationists to Be More Effective

When preservationists and conservationists work within their separate arenas, the historic landscape is not fully protected. Too many instances of demolition of significant historic properties in otherwise protected landscapes testify to the dire results of this approach. Working harder within an information silo will not solve the problem—preservationists would be doomed to looking out from inside their box, wondering why those other people weren't doing a better job of protecting all the heritage assets at stake. Working smarter and understanding what it takes to get out of our preservation box has great potential for achieving success in saving the whole places that we care about. Here are ten ways to climb out of our box and into greater alignment and engagement with conservation interests.

**1. BUILD CAPACITY:** Build the capacity of statewide and local preservation organizations to participate in conservation real estate transactions, to hold easements, to negotiate with property owners, and to collaborate with land trusts. Preservation organizations need both more boots on the ground and the wherewithal to take on a broader range of programs and activities.

**2. RISK CAPITAL:** Establish more (and more robust) preservation revolving funds. Revolving funds are pools of capital that are used to temporarily acquire historic properties that can then be turned over to more permanent stewards. If preservation revolving funds were available to work alongside those of conservation groups, sharing the risk, then preservationists would have “skin in the game.” Such participation not only assures a seat at a table, but has the wonderful effect of focusing attention and action to the opportunity and task. When money is at stake, a new level of seriousness enters the preservationist's evaluation of risk and reward.

**3. ADJUST OUR ATTITUDE:** Learn how not to be the “preservation police.” Adding value to a project is different from regulating actions. Working with



Coggeshall Farm, Bristol, R.I.

PHOTO BY GEORGE PARE

property owners for mutual gains would engage the many proud owners of historic properties in the preservation movement in a new and more satisfying relationship—inviting owners to be a part of the solution. If preservationists were known for being creative, entrepreneurial, flexible, and friendly, imagine how outcomes might differ. Developing a new paradigm with owners of historic property could have a profound impact on preservation success.

**4. BROADEN OUTREACH:** Seek out partnerships and collaborations with land conservation groups. Move beyond the preservation silo and expand methods and outcomes. Preservationists can infiltrate land trusts and call for help on threatened properties in cases where there is synergy.

**5. BE STRATEGIC:** Adopt a strategic approach by articulating what is most important to protect and then determining the means best suited to accomplish the goals. Many land trusts develop a priority list of properties to work on, chosen to accomplish their strategic goals. Preservationists are reluctant to commit in such a strategic way. The exercise of preservation organizations answering the question “What are the top properties to preserve in our geographic area?” might spark interesting conversations about what difference the organization is trying to make in its community. When the top priorities are articulated, then action plans can be envisioned, including assessing how owners of historic properties might be brought into the effort.



**Block Island, Rhode Island.**

PHOTO COURTESY PRESERVE RHODE ISLAND

**6. REFORM TAX POLICY:** Work to make relatively small but significant changes to existing federal tax policy and improve the functionality of incentives to permanently protect historic properties. For instance, change the requirement that a historic property be a “certified historic structure” to that it be “determined eligible for the National Register.” This substitution would continue the intended independent

guarantee of historic significance (to make certain the tax subsidy is in the public interest), but with a whole lot less bureaucracy. Another welcome change would be to address the difficulties of appraising preservation easements and the IRS’s challenges to deductions for easement donations. Perhaps give the owner/taxpayer the choice of a modest fixed deduction instead of the complicated and sometimes unfathomable property-specific appraisal. A modest fixed deduction could alleviate owners’ concerns of triggering an IRS audit. Finally, many states

have created tax incentives for donations of land for conservation purposes—but few state tax incentive programs exist for donations of historic properties for preservation purposes. Such state tax incentives, even modest ones, could have a great impact on prompting donations.

### **7. SUPPORT STEWARDSHIP:**

Devise a program, through insurance or a pooled endowment, so that small preservation organizations can take on easements. Small organizations need assurance that they can defend preservation easements and back up the preservation promise in a way that doesn't bankrupt their organizations.

An obstacle to preservation organizations taking on real estate transactions that involve easements and other perpetual obligations is stewarding these real property interests forever. Building an endowment in sufficient size to match these perpetual obligations, including any legal defense, is daunting for small preservation organizations. National help to devise an appropriate and affordable insurance product, or to build a pooled defense fund, seem like practical ways to allow small organizations to enter the world of easement transactions.



Historic home, Rhode Island.

PHOTO COURTESY PRESERVE RHODE ISLAND

**8. DEVELOP AN ACQUISITION STRATEGY:** Be strategic about deciding when and how the risk of acquisition is worth the preservation reward. Organizations that pass over acquisition as a tool to protect historic properties because of the risks and costs involved are throwing out the baby with the bathwater. In particular, the short-term acquisition of threatened properties that can then go to more permanent stewards is a familiar preservation tool, as is the acquisition of easements. Expanding the use of these tools so they are more common would amplify preservation success.

**9. SEEK MORE FUNDING:** Work to increase funding at all levels for both land conservation and preservation! Preservation, in particular, would benefit from federal, state, and local policy focused on developing more funding.

**10. ENGAGE NEW LEADERSHIP:** Capitalize on the voluntary commitment of the owners of America's heritage assets to expand the preservation movement. The nonprofit leaders of preservation across the country—the National Trust for Historic Preservation, and the statewide and local preservation organizations—can position themselves to use the passion and enthusiasm of the thousands of owners of historic places to join in protecting places that matter.

control of owners' actions to protect historic properties—through, for example, historic district design guidelines or Section 106 reviews. Preservationists advocate for governmental regulation as a systematic approach to minimize harm to historic properties.

**2. Acquisition Practices:** Some preservationists avoid acquisition because of the risks and costs associated with ownership. Most preservation organizations look to others to acquire and rehabilitate property, offering technical assistance in preservation matters but rarely getting directly involved in ownership. Acquisition is not allowed as a part of federal and many state preservation grant programs. The handful of preservation revolving funds that do use acquisition as a tool contrasts to the more than 2,000 land trusts in America that own land and interests in land.

**IF THOSE OF US in the preservation movement adopt some of conservation's best practices and work collaboratively with conservation partners, we will be more effective in saving buildings along with land.**

Conservationists use acquisition (in fee or through easements) as the primary method to protect important places.

**3. Funding Strategies:** The majority of historic preservation activities are privately funded. Homeowners and commercial redevelopers fund most preservation projects from their own resources. Public funds that may subsidize a project are derived from (scarce) federal and state programs and from tax incentives for qualifying projects. In contrast, most conservation projects are primarily supported through federal,

state, and local public dollars. Many conservation initiatives include a public vote to approve funds—convincing voters to raise their taxes to save a special place. Conservationists have become proficient at managing campaigns to get “Yes” votes for conservation funding. Because of their reliance on public funds, conservationists tend to be clear communicators regarding the public interest served by their work. Both conservation and preservation organizations rely on philanthropic support, but such support is more widely available in larger amounts for conservation organizations and projects.

**4. Measures of Success:** Preservationists count success as the rehabilitation of historic properties, keeping properties in productive use and on the tax rolls. Success also means minimizing harm to historic properties, such

as providing for archeological data recovery or requiring developers to adopt an alterna-

tive that avoids or minimizes adverse impacts to historic properties. Conservationists evaluate success by the permanent protection of places, either through fee ownership by a conservation organization or through a permanent conservation easement.

#### **BEST OF BOTH WORLDS**

In short, preservation and land conservation specialists have each invested in accumulating expertise within their very different approaches to accomplishing strikingly similar goals. If the best practices from each discipline were com-



Preserve Rhode Island is working with land conservation groups on Block Island to develop a preservation easement program that complements the great land conservation work that is ongoing. A voluntary preservation easement program could be a winning strategy for protecting cultural landscapes on the island like this one.

PHOTO COURTESY PRESERVE RHODE ISLAND

bined to work in tandem, the capacity of organizations to save places that matter to communities would increase. A united effort would likely have a bigger impact on protecting the natural and cultural assets of communities across America.

Preservationists can learn a lot from conservationists. If those of us in the preservation movement adopt some of conservation's best practices and work collaboratively with conservation partners, we will be more effective in saving buildings along with land. In addition, we'll become better preservationists too, with expanded skills and an expanded

tool kit to save the places that matter everywhere. **FJ**

---

VALERIE TALMAGE is the executive director of Preserve Rhode Island. She is the former executive director of the Massachusetts Historical Commission and Massachusetts State Historic Preservation Officer. After 15 years of public administration, her career transitioned to land conservation projects, working as a land protection specialist for The Trustees of Reservations. In 1997 Talmage became the director of projects for the New England Office of the Trust for Public Land, overseeing a portfolio of conservation real estate transactions. In 2007 Talmage joined Preserve Rhode Island, the statewide preservation organization that itself stewards five historic sites while leading the state's efforts to encourage Rhode Islanders to protect special places.

# Forum

NATIONAL TRUST FOR  
HISTORIC PRESERVATION

1785 Massachusetts Avenue, NW  
Washington, DC 20036  
[www.PreservationNation.org](http://www.PreservationNation.org)

Return Postage Guaranteed  
Address Correction Requested

PERIODICALS  
POSTAGE  
PAID  
Washington, DC

\*\*\*\*\*SCH 3-DIGIT 028

71248728  
MS. VALERIE TALMAGE  
PRESERVE RHODE ISLAND  
957 N MAIN ST  
PROVIDENCE RI 02904-5715



Scituate, Rhode Island.

PHOTO BY RICHARD PRULL

