

North Country Trail Association's

Volunteer Guide to Trail Protection

With 30 NCTA chapters and more than 10 Affiliates working to protect the North Country National Scenic Trail, varying degrees of experience exist among our volunteers. Strengths, weaknesses, challenges and opportunities are slightly different from one to the next. The scope of this document is to focus on the basics of the trail protection process, and not to plumb the depths of due diligence so whatever your situation, we hope you will glean something useful from the following pages.

What is trail protection?

In simple terms, trail protection refers to the act of securing a permanent corridor for the NCT. As we forge ahead building new trail each year, particularly on private land, how will we make sure the trail and the surrounding area are enjoyed into future generations? Many of you already have Handshake or Trail Access agreements with landowners, but few permanent easements exist to secure access. By solidifying agreements for our current trail and the connections in between, we will get closer to our goal of completing the longest premier hiking trail in the United States.

What is your role?

You are the key! Serving as the initial contact between the NCTA and landowner, you are crucial for three important reasons:

- You are our first impression.
- You are a member of the same community of private landowners.
- You are the frontline in influencing trail protection agreements.

Without exaggeration, the NCNST would not exist without your contribution. Below you will find some of the tools needed to approach landowners. We are here to help you every step of the way, feel free to contact us with any questions or comments about the trail protection process.

How to get started?

This can be an expensive, legally difficult and time-consuming endeavor but collectively, we can team up to be successful. Follow the sections set up for you in this guide, keep in touch with NCTA staff and with patience, we will be successful.

This Guide to Trail Protection introduces eight sections:

- 1) Pack Your "Pulaski" Before You Go
- 2) Choose Your Priorities
- 3) Build a Team
- 4) Determine Property Ownership
- 5) Work with the Landowners (with subsections a-d and Tips)
- 6) Find Funding
- 7) Record keeping and Recognition
- 8) Monitor and Celebrate

Section 1: Pack Your "Pulaski" before you go

Just as you need a Pulaski to build a trail, knowledge is an indispensible tool for a successful first impression with landowners. Begin with NCTA's official position and policies on trail protection outlined in this document and found at northcountrytrail.org. They will guide you on how to prioritize, define the types of agreements currently permitted by the organization, and offer sources of funds to help cover the costs associated with this endeavor.

Next, check these national, regional and local land trusts that provide robust resources for those engaged in land conservation efforts. Below you will find a sampling of some of the best known land trusts and conservancies in each of our states.

National Organizations

- Land Trust Alliance www.landtrustalliance.org
- Conservationtools.org
- The Nature Conservancy www.nature.org

State and Local Organizations

New York

- Hudson Highlands Trust www.hhlt.org
- Open Space Institute www.osiny.org
- Rensselaer Land Trust www.renstrust.org

Pennsylvania

- Western Pennsylvania Conservancy
- Pennsylvania Land Trust Association

Ohio

• Three Valley Conservation Trust http://www.3vct.org/protected-lands0.aspx

Michigan

- Heart of the Lakes <u>www.heartofthelakes.org</u>
- Land Conservancy of West Michigan www.naturenearby.org

Wisconsin

- Gathering Waters Conservancy <u>www.gatheringwaters.org</u>
- The Blog for Wisconsin Land Trusts www.wisconsinlandtrusts.org/

Minnesota

- Minnesota Land Trust www.mnland.org/protecting-land/
- Parks and Trails Council of Minnesota www.parksandtrails.org

North Dakota

 The Nature Conservancy <u>www.nature.org/ourinitiatives/regions/northamerica/unitedstates/northdakota/ind</u> ex.htm

Section 2. Choose your priorities

As your chapter develops the route of the NCNST in your area, you will begin with topographic maps and aerial photographs of your region. By identifying the current trail location and gaps in between, you will have a good place to start. You might have targets that have existing trail but no formal agreement to protect it or you may be approaching someone for the first time to gain access for a completely new section of the NCT.

Nailing down a comprehensive prioritization scheme for the entire trail is next to impossible, and is often determined by local circumstances and opportunities. Here are some considerations when choosing your priorities:

- Longer road walks that are particularly dangerous and need to be re-routed
- Larger tracts of land where an easement or purchase could easily close in the gap
- Opportunity: Historically stagnant gaps with a new opportunity (e.g. the landowner is now interested in talking after years of "no way")
- Small gaps that would unify longer, completed trail legs if they were secured
- Shared priority: You have government or land trust partners interested in the same area you are.
- Current trail that has only the Handshake Agreement and needs permanent protection.

Section 3. Build a team

Projects that we are interested in may overlap with other group's plans. Building relationships with local land trusts, conservation organizations, public land management agencies and local governing bodies can help you identify opportunities to work together to protect the NCT landscape. These partnerships can help you leverage resources or simply build awareness for the cause. Talk to NCTA staff for help.

Section 4. Determine property ownership

The job of locating property owners can be accomplished by studying county GIS websites, tax records at your local county courthouse and by using county plat books. Most county GIS programs are interactive and fairly user-friendly. Clerks in county real property offices are usually willing to help you learn the system.

Once you identify the landowner, find the mailing address and other contact information. Some landowners are year-round residents, others may be seasonal, or the property might be held in trust or by a company with a remote office. It may take time to track down this information.

Section 5. Work with the landowners

a. Know your landowner options

Before your first meeting with landowners, you should be familiar with the options. There are currently three types of permissions the North Country Trail Association (NCTA) can enter into. There are other agreements and arrangements that can be made if you have a partner at the table willing to hold title to land or a conservation easement. Permanent protections like Trail Access Easements are preferred over non-binding agreements, but can be harder to get. Your chapter should focus on the following options and negotiate with your landowners to achieve the highest level of protection possible.

NCTA Approved protection measures

You are allowed to offer landowners the following options:

Trail Access Easement: Our preferred way to protect the Trail, a TAE grants permanent permission to the NCTA for the Trail to pass through a defined corridor on your property, granting access to the public. This agreement is bound to the property and passes on to subsequent owners.

- This agreement offers permanent permission for trail passage and is not revocable under normal circumstances.
- This agreement is bound to the property and passes on to subsequent owners.
- This easement agreement is recorded, with a copy of the property deed, at the local County Clerk's office.
- A TAE does not restrict other activities on the property like a conservation easement.
- NCTA may incur financial costs like a purchase cost, filing fees, etc.
- NCTA Executive Director's signature needed.

Trail Use Agreement: A written but non-binding agreement outlining conditions and permitted uses on the property.

- This agreement is revocable by the owner at any time.
- This agreement does NOT pass to the next owner.
- This agreement outlines all the stipulations for trail passage on the landowner's property. This agreement is a good vehicle for outlining usages permitted, special blazing, or sign requests.
- Form supplied by the NCTA.
- Chapter President's signature needed.

Handshake Agreement: This is just what it sounds like. A goodwill agreement between the landowner and the NCTA about the location of the Trail, sealed with a handshake, conversation or informal written document.

- This agreement is revocable by the owner at any time.
- This agreement does NOT pass to the next owner.
- Special conditions or signage are always negotiable (like closure during hunting season).

Other possible options

The following options are only on the table if you have a partner willing to hold the title to the land or the easement. NCTA can be a valuable member of the team, just not the owner of the property or conservation easement in the end.

Conservation Easement: This type of easement is desired to protect the land's conservation values like habitat and water quality. Unlike the Trail Access Easement, which just grants permanent access to the land, the Conservation Easement will outline what activities can and cannot take place on the property, as agreed upon by the landowner and a local land trust, to maintain the desired condition of the land and its resources.

Fee Simple Ownership: Donation or sale the property to a local land trust or local agency. NCTA will partner with land trusts, state and local agencies to build and maintain the Trail the property if a landowner has chosen to donate to a local entity.

b. Communicate the benefits of the Trail

Why should someone open up their land to the North Country Trail? As a volunteer, you have many reasons for being involved with the NCT. Share those reasons and your stories with the potential trail hosts.

- Provides healthy, recreational opportunities for your family and community
- Safeguards natural areas, wildlife habitat and watersheds
- Brings communities together to create a public resource and builds a recreational legacy for current and future generations
- Links the region's parks with surrounding farmlands, cattle ranches, forests and open space
- Creates connections between small communities
- Cultivates appreciation and protection of the North Country's natural, cultural, agricultural and historic resources

c. <u>Understand the landowner's potential concerns</u>

Below are many of the topics that might arise in your conversation with a landowner considering hosting the Trail. Be prepared to answer questions, but don't be afraid to say in earnest, "I don't know. I'll find out and get back to you."

<u>Liability</u>- Permission to allow the trail should not add a burden to the owner's risk exposure. The landowner, acting as a Trail Host, is protected under the state's Recreational Use Statute (RUS), which relieves an owner of any special liability if they permit recreational usage of their land for free to the public. We will give you a copy of your state's RUS upon request and they can be found on our website.

According to the statute, private landowners are only liable for injuries under the following conditions:

- 1. the landowner willfully or maliciously failed to guard or warn against a hazard
- 2. the landowner granted permission to their property for a fee
- 3. the injured party was expressly invited onto the property rather than merely permitted to enter

Landowners seeking additional reassurance have a few more options:

NCTA's liability policy: We can add a private landowner to NCTA's liability policy. This is renewable every year and the onus is on the landowner to contact us to renew.

NPS VIP Agreement: National Park Service may offer private landowners Volunteer in the Parks (VIP) status which would provide assistance with tort claims to the landowner. The NPS is only willing to give the VIP Status to owners willing to grant multi-year or permanent access for the trail. Volunteers who are working on private lands and who report their work hours are also given this VIP assistance for injuries incurred while volunteering. The VIP Agreement is administered by the NPS and is not a preferred method for securing trail passage unless all other types of permissions are inadequate for the landowner.

Routing- NCTA will only place the trail where the owner fully approves. All routing details should be placed on a map before the trail is constructed. It is important to walk the proposed route with the landowner. It is advisable to take the landowner on a guided hike (if possible) of a nearby completed trail segment so they can see what the NCT is actually like. Try and find a segment that would be similar (e.g. has side hill construction, mowed grass, fence stiles, structures, etc).

<u>Access</u>- Trail signs should indicate that the property is private and users must stay on the designated trail. Property owners will continue with the normal use of their property including hunting, fishing, forest management or farming unless otherwise stated in the agreement.

<u>Abuse</u> - Dispel concerns about vandalism, trash or misuse with local success stories from nearby landowners. Remind the landowner that hikers are largely responsible trail users and are hiking to escape for a quiet and beautiful natural experience. It is also a good idea to quote the mileage your chapter is responsible for stewarding on surrounding private and public lands.

<u>Design and Uses</u> – The NCT is designed and built as a footpath according to the NPS "Manual for Trail Design, Construction and Maintenance." The Trail on private property will normally be constructed for foot travel only to live up to our Desired Future Condition (DFC) as a premier hiking trail. Other non-motorized uses may be permitted only if insisted upon by the landowner.

<u>Camping</u>-Owners are encouraged to consider whether they will permit camping and whether they wish to designate a camping site. Maps will reflect this information and signs should indicate whether camping is permitted. All costs of establishing and maintaining a campsite will be borne by the NCTA although permits, if required, may need the consent of the landowner (e.g. county health permits for a privy).

<u>Gates and Fences</u>- If there are existing fences that would need to be crossed by a hiker, stiles are preferable because they will prohibit other uses (e.g. horses and ATVs) and they will keep the property and any livestock secure. But they also make maintenance more difficult because they stop DR Mowers from crossing the fence. If the property has existing gates, hikers will be encouraged to leave them as they find them.

<u>Signs</u>- The NCTA works with private landowners to sensitively place signs, Carsonite posts, and blue blazes for the North Country National Scenic Trail on a landowner's property. These signs and blazes help people locate and use the Trail and inform them about permitted and prohibited uses.









Blue blaze

Common decal

Carsonite post

Private property sign

<u>Monitoring</u> – The local NCTA chapter/Affiliate/Partner will work with the landowner to keep the Trail maintained and regularly address any issues the landowner has. The relationship is a long-term commitment on both sides.

<u>Enforcement</u>- The NCTA will work with the private landowner on enforcement problems if they arise. This can include signs, barriers, or contact with local law enforcement.

d. Meeting landowners

"Establishing a good, personal rapport with a potential donor (or seller) is vitally important to the success of the project." -- Henderson and O'Donnell, Land Trust Alliance, Acquiring Land and Conservation Easements, 2009

As you might expect, there are many paths to a landowner's heart. You could run into them at the grocery store or by accident. You could be introduced through a friend or associate. It is great to find a chapter member / NCT supporter / agency partner who already has a relationship with the landowner to "open the door" rather than a call out of the blue. Or, you might not have the luxury of any of the above, and resort to sending them a "cold-call" letter. For the latter, find the landowner's contact information from your county property or GIS department.

Be prepared to encounter all kinds of folks: from ones who think you're from the government invoking eminent domain, to high-power business persons well-acquainted with meetings of this nature; from the environmentally indifferent, to the passionate activist.

If a landowner agrees to a meeting, identify two chapter members, or a chapter member and another local trail host, to visit the prospective landowner. NCTA has prepared a flyer with landowner options for each state. This and a brief letter of introduction should be sent to the landowner in advance to request an informal chat. The flyer is simple by design.

Volunteers should feel comfortable speaking openly about their passion for the Trail and answering landowner questions. You should have the NCTA Landowner Options brochure and supplemental information to give to the landowner for reference (available on our website). The volunteers who are doing the asking should be familiar with the landscape and the local community and be friendly and non-intimidating. After introducing yourself as a volunteer from a non-profit organization, reassure the landowner that you don't want money or even any time or work from them. The NCTA is asking only for permission to enjoy the prettiest parts of their property.

NCTA will provide you with the following:

- Introduction letter template for you to personalize
- Landowner Brochure specific to your state
- Additional materials such as an overview map and a copy of the latest *North Star* magazine.
- A copy of your state's Recreational Use Statute

Goals for the First Meeting

- Talk about the North Country Trail. Describe the mission of the NCTA & the benefits of the Trail and trail protection.
- Show on maps the NCT in their local area pointing out gaps and how their property fits into the NCT route
- Find out more about them. What is their history with the property?
- Does the landowner have goals for the future like development, resale, or conservation of wildlife habitat or natural resources?
- This should be just an informal chat, not an interview. Avoid note taking.
- Don't talk about money. Save trail protection details for another meeting.
- Don't overwhelm the landowner with lots of information. Build the relationship over time.
- Leave the Landowner Brochure and your card.

In future meetings, provide the spectrum of options. Indicate which is most preferred and why. Apprise them of the procedures involved (e.g. assessment, survey, land conservancy and NCTA board approvals) and that fees are involved (but there are possible solutions to these issues). Provide information, not legal, financial or tax advice. If you get a "yes," celebrate your success!

While the NCTA prefers permanent protection of the trail corridor, many landowners will not be willing to sign anything binding until they have had a positive experience with the Trail on their property. If you are only able to get a Trail Use or Handshake Agreement, you can foster the relationship with the landowner over time and move toward a more permanent form of protection down the road. Your chapter should discuss this issue before beginning this process to make sure you are in agreement about constructing trail (and potentially expensive projects and time-consuming structures) on lands without permanent protection like an easement.

Tips for positive interactions

- Be prepared. Landowners typically have lots of general questions about the North Country Trail. Be prepared to comment on: NCTA's mission statement, the corridor from NY to ND, the amount of Trail left to complete, and who administers, funds, builds, maintains, and protects (secures) the Trail. Be prepared to talk about access, trail design, camping, gates or fences, signage, monitoring and enforcement, routing across the landowner's property.
- **Avoid group meetings**. Even if you have an opportunity to have one, avoid group meetings. They don't work and invite strife. Approach each prospective grantor individually, through a mutual acquaintance if possible.
- Present the options. While a gamut of options exists for landowners, most of
 the time chapter liaisons need to concern themselves with only three: the
 Handshake Agreement, the Trail Use Agreement, and the Trail Access Easement.
 Know these by heart. Assure the landowner that tailor-made trail protection
 plans are available. If a landowner is only interested in selling or donating their
 land, that's potentially great news! At that point, you need to bring in an NCTA-

- appointed partner in a land conservancy. Flexibility and a good ear are imperative here.
- It's ok to say "I don't know." In your initial contact with landowners, avoid suggesting obligations on the part of NCTA or any partners. There are many moving parts to the private/public venture of building a National Scenic Trail. Even if you are a realtor or real estate attorney, deference is necessary so that the NCTA remains true to their legal obligations and constitutional by-laws.
- Don't lead with the negatives. We often feel that we need to address concerns
 before they are even concerns. Liability and damage to property are subjects
 that should be addressed but when we begin the conversation with a discussion
 about the possible negative impacts that will stick with the landowner. Wait for
 the landowner to inquire about these topics.
- Listen. Don't talk too much. It may feel uncomfortable at first but a little awkward silence will give the landowner a chance to open up and start talking. Let them talk about what they want for their family and their land.
- **Be Patient.** Discretion, tact and professionalism will win the day. Avoid language or posturing that could be construed as high-pressure. Listen to the landowner's concerns. Remember, our end goal is to obtain landowner cooperation/partnership. Trail protection takes time.
- **Stay in Touch**. Even if a meeting is not immediately successful, send the landowner a thank you card for their time and consideration and ask them if they would like to be added to the local Chapter email list for more information.
- Private or Public. Whether the chapter is interested in placing trail on private
 property, corporate lands, in town, across parks or on county lands, treat all
 landowners as landowners. Translation: federal, state and municipal entities
 are under no obligation to work with us.



Landowner brochure

Section 6. Funding

The costs associated with different trail protection options vary greatly. Will the landowner donate an easement? Do you need to pay the landowner for a Trail Access Easement (TAE), or are you working with a land trust or a local agency to secure a Conservation Easement (CE) or something more? It's important to know all the costs that may arise and where you can find money to cover those costs.

a) Budgeting

Budgeting for a typical easement is, well, atypical. Compensation for the easement alone can be a small part of the overall project. Following due diligence prior to the deal and monitoring the easement long-term are also important costs to keep in mind. Not all due diligence steps are necessary for every level of agreement and cost vary dependent on circumstances and location. With this in mind, we have categorized the types of costs you may need to consider in your project budget, but not the estimated costs themselves. That will require a closer look at the individual project.

- Initial planning cost (one time): Due diligence expenses including property evaluation, planning, title work, survey, appraisal, Phase One environmental assessment.
- Easement cost (one time): Cost of the easement, documentation and recording fees.
- Initial trail building (one time): Construction and signage.
- Monitoring Easement Management (ongoing): maintenance costs and site visits.
- Enforcement (ongoing): Legal defense contribution.

b) Finding Funds

Trail Protection Grant Program

Through this new program, your chapter or affiliate/partner organization can apply for funds to purchase easements or cover other related costs.

Grants may be applied toward the purchase of rights of way including Trail Access Easements (TAE) and related costs. All requests will be considered but in an effort to put our resources where they are needed most, priority will be given to projects that will make the most impact.

If you have landowners who are interested in an easement, start pulling together this information. The grant application is online, and the Trail Protection Committee will review grant requests on a regular basis.

Other Funding Sources

Many state and local grant programs exist to help organizations protect land or recreation resources. In 2009, the NPS was given the right to purchase land and easements on behalf of the North Country Trail (aka, willing seller authority). Each year, NCTA and NPS staff will work to identify our land acquisition priorities and submit requests for funding through the Land and Water Conservation Fund. It is important to note that neither the NPS nor the NCTA wants to be the title holder of the property, but we have many emerging opportunities to work with our land management partners like the USDA Forest Service, state agencies and local land trusts to find solutions that can make us all happy. Likewise, many state and local governments and land trusts have sources of funds that can assist you in your work.

Private or Corporate Foundations/Philanthropy

Writing grants is a time-consuming endeavor. If you have a willing chapter member who is in the communications profession, their help can be invaluable to secure funds for trail protection projects. One word of caution: so that the right hand knows what the left is doing, please coordinate all grant-writing projects with NCTA headquarters in Lowell, Michigan because we have established giving relationships with numerous organizations and may be able to offer assistance. From the perspective of a donor, getting duplicate requests might reflect poorly on the NCTA and its chapters.

Section 7. Recordkeeping and Recognition

Once private landowners grant permission for the Trail on his/her property, a chapter/affiliate/partner representative should register the landowner's name, address and property location on the Trail, including a map and tax map property number, with the NCTA Director of Trail Development. The landowner is entitled to a regular NCTA membership free of charge and will receive our magazine, *North Star*, as a small token of our appreciation. Once your local trail includes private landowners, you'll also be amazed how many of them change hands each year, so you must monitor the status of your private trail segments, and share the updates with the NCTA.

Following up with and fostering the relationship your chapter has with a private landowner is of the utmost importance. Landowners, who don't see or hear from the local chapter, especially if the Trail on their property is poorly maintained, are likely to become disappointed with their decision to host the Trail. A chapter has to set up a regular schedule of landowner communications to create a sense of trust and respect with their trail-hosting landowners.

Key points to keep in mind:

- Have one chapter/organization member in charge of your landowner relationships.
- Track your agreements and contacts with each landowner on a spreadsheet (template provided from HQ).
- Every landowner is entitled to free membership with the NCTA.
- Every landowner agreement needs to be sent to the Director of Trail Development at NCTA headquarters in Lowell, Michigan.
- Invite the landowner to chapter events, include them on your newsletters, etc

Devising a system of easement recordkeeping and reminders is important. In that sense, we need to consider the future of the organization and those who will take our place in this noble endeavor of building the Trail. Accordingly, make sure that all official agreements and original documents are tracked on your chapter's spreadsheet, transferred to NCTA headquarters, and that your chapter's record keeping is organized, making it easier to transfer from chapter officers to their successors.



Recognize the landowners

Section 8. Monitor and Celebrate

Once an agreement has been reached between the chapter volunteer and landowner, regular and well-documented visits to the property are required in order to monitor the state of the Trail, record any violations of the agreement, express thanks and give them an opportunity to share concerns.

Usually, the NCTA or a land conservancy does not need to worry about a current landowner violating an easement agreement. The problems most often occur when that landowner sells, bequeaths or otherwise disposes of the property to successive owners who may not cherish a conservation ethic, or heed ethical or legal matters.

So, what are the nuts and bolts of monitoring?

- 1. Notify the landowner well in advance of the visit. The landowner should accompany you on the visit if possible;
- 2. Review the easement document. Refer to the main restrictions of the easement during the visit;
- 3. Bring along maps, camera or photos of the parcel;
- 4. Note any changes to the property;
- 5. Discuss observable changes with the owner;
- 6. Complete an inspection report and send two copies to the landowner. Ask him/her to sign one and return it (Diehl & Bartlett, *The Conservation Easement Handbook*, p. 90).

Experts agree that, when dealing with easement violations, one should not tarry. Deal with them immediately, but with propriety and diplomacy. It cannot be understated that NCTA HQ be notified immediately if some egregious violation is underway (like bulldozers powering up, or a structure being built right in the middle of the Trail).

Finally, it's time to give credit where credit is due. Please accept our heartfelt thanks and praise for your tireless, volunteer effort towards making the NCNST dream a reality. We vigorously applaud your selfless service and commitment to the mission of the NCTA. Future generations will look back and ask in amazement, "Did volunteers build this Trail?" To which we will proudly proclaim, "Indeed they did!"