

# Governance Reference Manual

## 2021-2022





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**For the governing board and advisory groups  
of The Trustees**

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## WELCOME FROM JOCELYN FORBUSH

It is my pleasure to welcome you to the leadership of The Trustees. Thank you for your commitment on behalf of our mission!

The Trustees has preserved and protected Massachusetts' landscapes and landmarks since Charles Eliot created the organization—the first of its kind—in 1891. Together we continue to honor the inspiring legacy of our founder and those who came before us by working to conserve more land for the public's use and enjoyment, forever. We find that while this was of critical concern for the Commonwealth's cities and towns when the organization was created, it has become no less crucial now for the well-being of the communities we serve.

To do this, we must focus on nurturing healthy and resilient landscapes, engaging many more people across our Commonwealth and beyond in our programs and our cause, preserving our history and our culture, cultivating a sustainable local food system, inspiring younger generations to connect with the natural world, and building The Trustees of the future.

You are the front line of The Trustees along with our staff. Whether you are a member of the Board of Directors, a new Corporate Trustee, or a member of a local property committee, your enthusiasm, dedication and generosity are critical to our success in the years ahead. It's your passion for the cause that will inspire others to get involved. The more you know about what we do—and how we do it—the more effective we will be in growing a new generation of conservationists.

This manual was created to help you find your way around The Trustees. It is your guide to the organization, to your role as a volunteer leader, to the many ways you can be more involved, and to one another. We hope you find it informative and helpful.

I look forward to working with each of you and thank you for the commitment you have made not just to The Trustees, but to creating a brighter future for communities across Massachusetts.

Warm regards,

Jocelyn Forbush  
Acting President and CEO

## I. ABOUT THE TRUSTEES

Founded by landscape architect Charles Eliot in 1891, The Trustees has, for more than 130 years, been a catalyst for important ideas, endeavors, and progress in Massachusetts. As a steward of distinctive and dynamic places of both historic and cultural value, The Trustees is the nation's first and Massachusetts' largest preservation and conservation nonprofit, and its landscapes and landmarks continue to inspire discussion, innovation, and action today as they did in the past. Supported by members, friends, and donors, The Trustees' 123 sites are destinations for residents, members, and visitors alike, welcoming millions of guests annually.

### Our Mission

To protect, for public use and enjoyment, places of exceptional scenic, historic, and ecological value.

### Who We Are

We are more than 200,000 members like you who love the outdoors, who love the distinctive charms of New England, and who believe in celebrating and protecting them for all to enjoy. Together with our neighbors, we are working to inspire a commitment to our special places and create healthy, active, greener communities. Our passion is to share with everyone the irreplaceable natural and cultural treasures we care for. Our goal is to empower all people across the state to speak up for the places and experiences that make Massachusetts the place they want to call home.

### What We Do

We enjoy and care for 123 special places, consisting of more than 27,000 acres, all around Massachusetts. And we are actively building an extended family of friends, neighbors, and partners across the state that can help in their different ways. Each year, approximately two million people visit our reservations, 250,000 people participate in our more than 5,000 programs and events, and volunteers contribute over 80,000 hours of assistance in all aspects of our work. The Trustees is a vibrant and growing network of people who are committed to preserving the Commonwealth's landscapes and keeping open space open for everyone, forever.

## What We Care About

For more than 130 years, The Trustees has been on the ground in communities across Massachusetts, working to protect special places, provide loving care of our reservations, build creative new programs to engage people and connect them to our places—our land and our natural world, our farms and our food, our history and our culture, our challenges and our joys—and sharing our expertise with neighbors and partners.

## What We Are Up Against

Through more than 130 years of hard work and high standards, The Trustees has built a sterling reputation and a stunning physical legacy. But “for everyone, forever” means that our work is never done. We are always innovating, experimenting with new technologies and new ideas, and always looking to the future. We can't do it alone: we must always strive to tap the wellspring of people's joy—in their communities, their heritage, and the natural world—in order to mobilize a whole new generation to care.

## What Our Future Holds

Today, the places we care about are going fast, and the forces undermining them are moving faster. Through a robust advocacy program, we work together with our members, volunteers, elected and appointed officials, and fellow conservation and preservation organizations to implement smart and effective public policies that help protect the special places of Massachusetts. On April 1, 2018 The Trustees adopted an ambitious five-year Strategic Plan, *Momentum*, that outlines our approach to conservation in Massachusetts over the coming years. We are committed to realizing these important goals:

### Protect the Places People Love

We save the iconic and the most exceptional places in Massachusetts. Today, this work requires thinking beyond our traditional avenues and leveraging new partnerships and geographies. To complement our ongoing commitment to saving places of regional significance, we will mount one of our most audacious efforts to date to create iconic open space on Boston's waterfront. We will also go beyond the focus of acquisition of reservations to a goal that encompasses the whole journey of our landscapes. Over the next five years, we will save and share our incredible places statewide to create the healthiest, most spectacular array of reservations, where our resources thrive and our public can engage.

### Respond to a Changing Coast

The Massachusetts coast needs our voice. Our 120 miles of the Commonwealth's protected coastline—landholding that is second only to the federal government—span more than 30 reservations. These are among our most visible and visited, where we welcome more than a half-million visitors each year. Over the next five years, we will uplift our coastal systems through targeted conservation, broad advocacy, cutting-edge land management, and robust stewardship. In short, we will leverage our prominent position among the coast's land holders to be the coastal conservation leader for Massachusetts.

### Elevate our Cultural and Agricultural Experiences

Our cultural sites, including designed gardens and community farms, are platforms for engagement. We know that when we activate our existing reservations with programming, visitor amenities, year-round learning opportunities, and superior stewardship, we improve the public's love and understanding of the importance of horticulture and agriculture. We will build upon these opportunities to elevate these properties to become welcoming, well-cared-for, vibrant community centers for learning about design, gardening, history, art, local food, and farming.

### Invite the Next Generation Outside

We will do more to invite the next generation outdoors. We must cultivate our replacements—the future generations who will carry on our work and care for our places and our mission. We know that the values and experiences that we have as young people influence the rest of our lives. We will do more to engage families—especially kids—in developing a passion for conservation and nature.

### Build The Trustees of the Future

We must always plan for perpetuity. We will secure our future through a balanced strategy of audience development complemented by fiscal sustainability. In order to cement our future, we must grow our tribe. We fuel our future dreams by engaging and attracting more visitors, members, and donors. Through 2023, we will do more to leverage technology, improve amenities at our properties, and build a culture of community, membership, and volunteerism.

The Trustees 2023 Strategic Plan, *Momentum*, is available at [thetrustees.org/momentum](https://thetrustees.org/momentum). We invite you to delve deeply into the strategies that will help us realize these considerable and mission-critical goals.

## II. THE TRUSTEES CHARTER AND BYLAWS

### Charter<sup>1</sup> (ADOPTED 2002)

#### SECTION 1

The Trustees of Reservations<sup>2</sup> shall have as its purposes acquiring, holding, arranging, maintaining, and opening to the public, under suitable regulations, beautiful, historic, and ecologically significant places and tracts of land primarily within this Commonwealth; acquiring, holding, maintaining, and enforcing such conservation and preservation restrictions, easements, and other interests in land, water areas, and structures<sup>3</sup> as it deems appropriate and in the public interest; and educating the public with regard to natural and historic resources and their conservation and stewardship, all in the manner and to the extent permitted by law, with the powers and privileges and subject to the duties set forth in Chapter 180 and in such other general laws as now or hereafter may be in force relating to such corporations; but said corporation shall have no capital stock.

#### SECTION 2

Said corporation shall have all of the powers specified in Section Nine of Chapter 156B except Paragraph (m) thereof, the power specified in Section Nine A of said Chapter and any other powers existing under Chapter 352 of the Acts of 1891 or now or hereafter permitted to a corporation organized under Chapter 180. Without limitation, such powers shall include the power to hold real property or any interest therein outside the Commonwealth.<sup>4</sup>

### Bylaws of The Trustees of Reservations (ADOPTED 2015)

#### SECTION 1

NAME, PURPOSES, LOCATION, CORPORATE SEAL, AND FISCAL YEAR

**1.1 Name and Purposes.** Name and Purposes. The name and purposes of the corporation shall be as set forth in the Articles of Organization of the corporation.

**1.2 Location.** The principal office of the corporation in The Commonwealth of Massachusetts shall be located at 200 High Street, Boston, Massachusetts 02110. The directors may change the location of the principal office of the corporation within The Commonwealth of Massachusetts, effective upon the filing of a certificate of such change with the Secretary of The Commonwealth of Massachusetts.

**1.3 Corporate Seal.** The directors may adopt and alter the seal of the corporation.

**1.4 Fiscal Year.** The fiscal year of the corporation shall, unless otherwise decided by the directors, end on March 31 in each year.

1 Frederick L. Ames, Philip A. Chase, Christopher Clarke, Charles R. Codman, Elisha S. Converse, George F. Hoar, John J. Russell, Leverett Saltonstall, Charles S. Sargent, Nathaniel S. Shaler, George Sheldon, William S. Shurtleff, George H. Tucker, Francis A. Walker, and George Wigglesworth and their associates and successors were chartered as The Trustees of Public Reservations by the Massachusetts General Court, c. 352, Acts of 1891. By virtue of Sec., c. 352, Acts of 1891, "All personal property held by said corporation, and all lands which it may cause to be opened and kept open to the public, and all lands which it may acquire and hold with this object in view, shall be exempt from taxation, in the same manner and to the same extent as the property of literary, benevolent, charitable, educational, and scientific institutions incorporated within this Commonwealth is now exempt by law; but no lands so acquired and held and not open to the public shall be so exempt from taxation for a longer period than two years. Said corporation shall never make any division or dividend of or from its property or income among its members." Prior to 1971, M.G.L. c. 180, Sec. 10 permitted not-for-profit corporations however formed to amend their charters. Such authority now appears in c. 180, Sec. 1.

2 The name The Trustees of Public Reservations was changed to The Trustees of Reservations by vote of the Corporation at its meeting on January 20, 1954.

3 The provisions relating to conservation and preservation restrictions, etc., were added by vote of the Corporation at a special meeting on April 21, 1971.

4 Section 2 in substantially the current form was added by vote of the Corporation at the May 14, 1987, Annual Meeting replacing statutory Section 2 limiting real and personal property holdings by monetary amounts. In accordance with c. 819, Acts of 1971, now appearing in M.G.L. c. 180, Sec. 6, all not-for-profit corporations became able to hold real and personal property in unlimited amounts.

## SECTION 2

### VOTING MEMBERS

#### 2.1 Number, Election, and Qualification.

The voting members of the corporation, shall consist of (a) Corporate Trustees, and (b) Life Trustees. Each voting member shall have one vote, which may be exercised in person or by proxy.

**a. Corporate Trustees.** Corporate Trustees shall be elected at any meeting of the voting members upon nomination by the directors for terms of up to three years, to hold office for such term or until the voting member's successor is elected and qualified or until the voting member dies, resigns or is removed. It is intended that Corporate Trustees' terms be staggered over three year periods. All directors of the corporation shall also be Corporate Trustees.

The number of Corporate Trustees is hereby established at not less than two hundred (200) nor more than six hundred (600), which numbers may be amended by a vote of the voting members pursuant to Section 2.9 hereof.

**b. Life Trustees.** Life Trustees<sup>5</sup> shall be elected at any meeting of the voting members upon nomination by the directors by virtue of having made substantial contributions to the corporation through the donation of interests in property, through monetary gifts or through the extraordinary contribution of services. Upon election by the voting members, a Life Trustee shall serve until the Life Trustee dies, resigns or is removed. There shall be no limit on the number of Life Trustees.

**2.2 Term Limits.** There shall be no limit to the number of terms a Corporate Trustee may serve.

**2.3 Powers and Rights.** In addition to the right to elect voting members as provided above, directors as provided in Section 3.1, and Advisors as provided in Section 5, and to the possession of such other powers and rights as are vested in them by law, the Articles of Organization or these Bylaws, the voting members shall have such other powers and rights as the directors may from time to time designate.

**2.4 Removal.** A voting member may be removed from office with or without cause by the vote of a majority of voting members or directors then in office, provided that notice of such proposed removal shall have been given in the notice of meeting. A voting member may be removed for cause only after reasonable notice and opportunity to be heard before the body proposing to remove the voting member.

**2.5 Resignation.** A voting member may resign by delivering his or her written resignation to any officer of the corporation, to a meeting of the voting members or directors, or to the corporation at its principal office. Such resignation shall be effective upon receipt, unless specified to be effective at some other time, and acceptance thereof shall not be necessary to make it effective unless it so states.

**2.6 Meetings.** The annual meeting of the voting members shall be held on the date and at the time and place within The Commonwealth of Massachusetts fixed from time to time by the directors. Meetings of the voting members may be held at any time and at any place within The Commonwealth of Massachusetts as the voting members or the directors may determine. Meetings of the voting members may be called by the chairman or by the directors.

#### 2.7 Notice of Meetings.

**a. All Meetings.** Reasonable notice of the time and place of each meeting of the voting members shall be given to each voting member. Such notice need not specify the purposes of the meeting, unless otherwise required by law, the Articles of Organization or these Bylaws.

**b. Reasonable Notice.** Except as otherwise provided by law, the Articles of Organization or these Bylaws, it shall be reasonable notice to send notice by mail at least seven days, or by electronic mail or facsimile at least three days, before the meeting addressed to the voting member at the voting member's usual or last known business or residence address or electronic mail address, or to give notice to the voting member in person at least three days before the meeting.

**c. Waiver of Notice.** Whenever notice of a meeting is required, such notice need not be given to any voting member if a written waiver of notice, executed by such voting member before or after the meeting, is filed with the records of the meeting, or if such person attends the meeting without protesting the lack of notice prior thereto or at its commencement. A waiver of notice need not specify the purposes of the meeting unless such purposes were required to be specified in the notice of such meeting.

**2.8 Quorum.** At any meeting of the voting members, twenty-five percent of the voting members then in office, whether present in person or by proxy, shall constitute a quorum, except when a larger quorum is required by law, the Articles of Organization or these Bylaws. Any meeting may be adjourned

to such date or dates not more than ninety days after the first session of the meeting by a majority of the votes cast upon the question, whether or not a quorum is present, and the meeting may be held as adjourned without further notice.

**2.9 Voting.** When a quorum is present at any meeting, a majority of the votes cast by voting members present in person or by proxy shall decide any question, including the election of voting members and directors, unless otherwise provided by law, the Articles of Organization or these Bylaws.

**2.10 Presence Through Communications Equipment.** Unless otherwise provided by law, the voting members may participate in a meeting of the voting members by means of a conference telephone call or similar communications equipment in which all persons participating in the meeting can hear each other at the same time, and participation by such means shall constitute presence in person at a meeting.

**2.11 Proxies.** Voting members may vote either in person or by written proxy dated not more than six months before the meeting named therein, which proxy shall be filed before being voted with the secretary or other person responsible for recording the proceedings of the meeting. Unless otherwise specifically limited by its terms, a proxy shall entitle the holder thereof to vote on any matter properly coming before the meeting and at any adjournment of the meeting, but the proxy shall terminate after the final adjournment of such meeting.

## SECTION 3

### BOARD OF DIRECTORS

**3.1 Number and Election.** There shall be not less than fifteen (15) nor more than twenty-five (25) directors who shall be elected by the voting members for terms of up to three years. The directors shall be elected by the voting members to hold office until the annual meeting at which the director's term expires or until the director dies, resigns or is removed. It is intended that directors' terms be staggered over three year periods.

**3.2 Term Limits.** No director shall serve more than three consecutive three-year terms, except as otherwise provided in Section 4.3 hereof; provided that, the period during which a director serves as an officer of the corporation shall not be counted in determining the term limit described herein. An interval of at least one year must elapse before a director who becomes ineligible for election under this Section 3.2 shall again be eligible to serve as a director subject to the term limit described herein.

**3.3 Powers.** The affairs of the corporation shall be managed by the directors, who shall have and may exercise all the powers of the corporation, except those powers reserved to the

voting members by law, the Articles of Organization or these Bylaws.

**3.4 Removal.** A director may be removed from office (a) with or without cause by the vote of a majority of the voting members or directors then in office, provided that notice of such proposed removal shall have been given in the notice of meeting. A director may be removed with cause only after reasonable notice and opportunity to be heard before the body proposing to remove the director.

**3.5 Resignation.** A director may resign by delivering his or her written resignation to the chairman, vice chairman or secretary of the corporation, to a meeting of the voting members or directors, or to the corporation at its principal office. Such resignation shall be effective upon receipt, unless specified to be effective at some other time, and acceptance thereof shall not be necessary to make it effective unless it so states.

**3.6 Vacancies.** Any vacancy in the directors may be filled by the directors on an interim basis until the next annual meeting, and at such annual meeting the vacancy may be filled by the voting members. The directors shall have and may exercise all their powers notwithstanding the existence of one or more vacancies in their number.

**3.7 Meetings.** Meetings of the directors may be held at any time and at any place within The Commonwealth of Massachusetts as the directors may determine or when called by the chairman, on at least an annual basis.

#### 3.8 Notice of Meetings.

a. All Meetings. Reasonable notice of the time and place of each meeting of the directors shall be given to each director. Such notice need not specify the purposes of the meeting, unless otherwise required by law, the Articles of Organization or these Bylaws.

b. Reasonable Notice. Except as otherwise provided by law, the Articles of Organization or these Bylaws, it shall be reasonable notice to a director to send notice by mail at least three days, or by electronic mail or facsimile at least two days, before the meeting addressed to the director at the director's usual or last known business or residence address or electronic mail address, or to give notice to the director in person at least twenty-four hours before the meeting.

c. Waiver of Notice. Whenever notice of a meeting is required, such notice need not be given to any director if a written waiver of notice, executed by the director before or after the meeting, is filed with the records of the meeting, or to any director who attends the meeting without protesting

<sup>5</sup> On and after September 25, 1991, by virtue of a previous version of the Bylaws, all persons who had been elected as either Life Trustees or Honorary Trustees prior to that date were designated Life Trustees under the Bylaws.



prior thereto or at its commencement the lack of notice.

A waiver of notice need not specify the purposes of the meeting unless such purposes were required to be specified in the notice of such meeting.

**3.9 Quorum.** At any meeting of the directors, a majority of directors then in office shall constitute a quorum. Any meeting may be adjourned by a majority of the votes cast upon the question, whether or not a quorum is present, and the meeting may be held as adjourned without further notice.

**3.10 Voting.** When a quorum is present at any meeting, a majority of the directors present and voting shall decide any question, unless otherwise provided by law, the Articles of Organization or these Bylaws.

**3.11 Action by Consent.** Any action required or permitted to be taken at any meeting of the directors may be taken without a meeting if all of the directors consent to the action in writing. Such consents will be filed with the records of the corporation and will be treated for all purposes as votes at a meeting.

**3.12 Presence Through Communications Equipment.** Unless otherwise provided by law, the directors may participate in a meeting by means of a conference telephone call or similar communications equipment in which all persons participating in the meeting can hear each other at the same time, and participation by such means shall constitute presence in person at the meeting.

**3.13 Executive Committee.** The directors may establish an executive committee consisting of at least the chairman, vice chairman, secretary, and the chairman of the committee charged with overseeing the corporation's finances, if any. The executive committee may, between meetings of the directors when conditions preclude calling a meeting of the entire board of directors, exercise any or all of the powers of the directors except the power to (a) authorize a petition for the dissolution of the corporation; (b) change the principal office of the corporation; (c) remove from office any officers, directors or the chief executive; or (d) authorize a merger. When exercising any powers of the directors, a quorum consisting of a majority of the executive committee shall be required. The executive committee shall be governed by the provisions of these Bylaws with respect to meetings of directors, meeting through telecommunications equipment and actions by consent. Prompt notice of any exercise of the powers of the directors together with minutes of meetings of the executive committee shall be given to the directors. The directors shall have the power to rescind any action of the executive committee, but such rescission shall not be retroactive.

**3.14 Other Committees.** The directors may establish committees, from time to time, to assist in carrying out the purposes of the corporation.

## SECTION 4

### OFFICERS

**4.1 Number and Qualification.** . The officers of the corporation shall be a chairman, a vice chairman, a president, a treasurer and a secretary. The chairman, vice chairman, and secretary shall be directors at the time of their election and during their tenure in office. The directors may from time to time designate additional officers, which persons shall serve at the pleasure of the directors. The secretary shall be a resident of The Commonwealth of Massachusetts unless the corporation has a resident agent duly appointed to accept service of process.

**4.2 Election and Term of Office.** The officers shall be elected by the directors. A director who is elected to serve as an officer shall be elected for a term of up to three years and shall hold office so long as he or she remains a director until the meeting coinciding with the end of his or her term or until he or she sooner dies, resigns or is removed.

**4.3 Term Limits.** No director shall serve more than six consecutive years in any one officer position; provided that, a director shall again be eligible for election to such office after an interval of at least one year during which such director does not hold such office; provided, further, that the term limit of six consecutive years for a director serving as an officer of the corporation may be extended under exceptional circumstances for an additional term not to exceed three years by a vote of two-thirds of the directors. A director who has (i) served as an officer of the corporation and (ii) reached the term limit described in Section 3.2 is eligible to continue as a director for an additional three-year term.

**4.4 Chairman.** The chairman shall be the senior elected officer of the corporation, shall preside at all meetings of the voting members and of the directors, and shall also have such other duties and powers as may from time to time be designated by the directors.

**4.5 Vice Chairman.** The vice chairman shall have and may exercise all the powers and duties of the chairman during the absence of the chairman or in the event of the chairman's inability to act, and shall also have such other duties and powers as may from time to time be designated by the directors.

**4.6 President.** The president shall be the chief executive officer of the corporation and shall report to the Board of Directors. Subject to the discretion and control of the directors, the president shall have general charge and overall management of the affairs of the corporation and may make decisions within general policy. The president shall have such other duties and powers as are usually incident to the office of president and as may from time to time be designated by the directors.

**4.7 Treasurer.** The treasurer shall be the officer charged with oversight of the financial affairs of the corporation. The treasurer shall have such other duties and powers as are usually incident to the office of treasurer and as may from time to time be designated by the directors.

**4.8 Secretary.** The secretary shall record (or arrange to be recorded) and maintain records of all proceedings of the voting members and directors in a book or books kept for that purpose, which book or books shall be kept within The Commonwealth of Massachusetts at the principal office of the corporation or at the office of its secretary or of its resident agent and shall be open at all reasonable times to the inspection of any director or voting member. Such book or books shall also contain an attested copy of the Articles of Organization and Bylaws and the names of all voting members and directors and the address of each. At any meeting of the voting members or directors, the presiding officer may designate a temporary secretary to perform the duties of the secretary. The secretary shall have such other duties and powers as are usually incident to the office of secretary and as may from time to time be designated by the directors.

**4.9 Removal.** An officer may be removed from office with or without cause by the vote of a majority of the directors then in office, provided that notice of such proposed removal shall have been given in the notice of the meeting. An officer may be removed for cause only after reasonable notice and opportunity to be heard before the directors.

**4.10 Resignation.** Any officer may resign by delivering his or her written resignation to the chairman, vice chairman or secretary of the corporation, to a meeting of the voting members or directors, or to the corporation at its principal office. Such resignation shall be effective upon receipt, unless specified to be effective at some other time, and acceptance thereof shall not be necessary to make it effective unless it so states.

**4.11 Vacancies.** Any vacancy in the office of chairman, vice chairman, president, treasurer or secretary may be filled by the directors at any meeting of the directors. Vacancies, if filled, shall be filled for the balance of the term.

## SECTION 5

### ADVISORS AND OTHER SUPPORTERS OF THE CORPORATION

The directors and voting members may from time to time designate certain persons or groups of persons as one or more categories of sponsors, benefactors, contributors, advisors or friends of the corporation or such other title as they deem appropriate ("Advisors"). Advisors shall serve in an honorary capacity for such term as the directors or voting members may determine. In the absence of any such determination, an Advisor shall serve until the next annual meeting of the voting members or special meeting in lieu thereof. Advisors shall not be directors or voting members of the corporation and shall not exercise any of the powers granted to directors or voting members and, except as the directors or voting members may otherwise designate, shall have no right to notice of or to vote at any meeting, shall not be considered for purposes of establishing a quorum, and shall have no other rights or responsibilities in their advisory capacity. The corporation may require an advisor to sign a confidentiality agreement before the advisor may commence service as an advisor.

## SECTION 6

### EXECUTION OF INSTRUMENTS

Any contracts, deeds, mortgages, leases, bonds, notes, checks and other instruments that are authorized to be executed by an officer of the corporation on its behalf shall be signed by any officer of the corporation or such other person(s) as determined by the directors, chairman, president or treasurer.

## SECTION 7

### NO PERSONAL LIABILITY

The voting members, directors, officers, employees, Advisors and other members of any committees of the corporation shall not be personally liable for any debt, liability or obligation of the corporation. All persons, corporations or other entities extending credit to, contracting with, or having any claim against, the corporation may look only to the funds and property of the corporation for the payment of any such contract or claim, or for the payment of any debt, damages, judgment or decree, or of any money that may otherwise become due or payable to them from the corporation.

**SECTION 8****AMENDMENTS**

These Bylaws may be amended by a vote of two-thirds of the voting members present in person or by proxy at a meeting of the voting members, provided that notice of such proposed change shall have been given in the notice of the meeting.

**SECTION 9****INDEMNIFICATION**

To the extent legally permissible, including to the extent that the status of the corporation as exempt from federal income tax under Section 501(c)(3) of the Internal Revenue Code of 1986, as amended (the "Code"), is not adversely affected thereby, the corporation shall indemnify every present and former voting member of the corporation, director, member of the executive committee, Advisor, officer of the corporation, and person who serves or has served at its request as directors, officers or trustees of another organization in which the corporation has an interest or in any capacity with respect to any employee benefit plan (collectively, together with their respective heirs, executors, and administrators, "Indemnitees"), against all expenses and liabilities, including counsel fees, reasonably incurred by or imposed upon such person in connection with the defense or disposition of any action, suit or other proceeding, whether civil or criminal, in which such person may be involved or with which he or she may be threatened, while in office or thereafter, by reason of his or her serving or having served as a voting member of the corporation, director, member of the executive committee, Advisor, officer of the corporation, or person who serves or has served at its request as directors, officers or trustees of another organization in which the corporation has an interest or in any capacity with respect to any employee benefit plan (other than (i) a proceeding voluntarily initiated by such person unless he or she is successful on the merits, (ii) a proceeding authorized by at least a majority of the full Board of Directors, or (ii) a proceeding that seeks a declaratory judgment regarding his or her own conduct); provided that no indemnification shall be provided for any such person with respect to any matter as to which he or she shall have been finally adjudicated in any proceeding not to have acted in good faith in the reasonable belief that his or her action or omission was in the best interests of the corporation.

Indemnification authorized under this Section 9 may, to the extent authorized by the corporation, include payment by the corporation of expenses incurred in defending a civil or criminal action or proceeding in advance of the final disposition of such action or proceeding, upon receipt of an undertaking by the Indemnitee to repay such payment if he or she shall be adjudicated to be not entitled to indemnification under this Section, which undertaking may be accepted without regard to the financial ability of such Indemnitee to make repayment.

An Indemnitee entitled to indemnification hereunder whose duties include service or responsibilities as a fiduciary with respect to a subsidiary or other organization, including an employee benefit plan, shall be deemed to have acted in good faith in the reasonable belief that his or her action was in the best interests of the corporation if he or she acted in good faith in the reasonable belief that his or her action was in the best interests of such subsidiary or organization or of the participants or beneficiaries of, or other persons with interests in, such subsidiary or organization to whom he or she has a fiduciary duty.

The payment of any indemnification shall be conclusively deemed authorized by the corporation under this Section 9, if:

(a) the payment has been approved or ratified (i) by at least a majority vote of a quorum of the disinterested directors or (ii) by at least a majority vote of a committee of two or more disinterested directors who are selected for this purpose by the full Board of Directors (in which selection interested directors who are parties may participate); or

(b) the action is taken in reliance upon the opinion of independent legal counsel (who may be counsel to the corporation) appointed for the purpose by vote of the directors or in the manner specified in clauses (i) or (ii) of subparagraph (a); or

(c) the directors have otherwise acted in accordance with the standard of conduct applied under Massachusetts General Laws Chapter 180.

The indemnification provided hereunder shall inure to the benefit of the heirs, executors and administrators of an Indemnitee. As used in this Section 9, an "interested" Indemnitee is one against whom in such capacity the proceedings in question or another proceeding on the same or similar grounds is then pending.

The right of indemnification under this Section 9 shall be in addition to and not exclusive of all other rights to which an Indemnitee may be entitled. Nothing contained in this Section shall affect any rights to indemnification to which corporation employees or agents other than Indemnitees may be entitled by contract or otherwise under law.

No indemnification, reimbursement or other payment may be made under this Section 9 with respect to penalties imposed under section 4958 of the Code to the extent such indemnification, reimbursement or other payment would cause the total compensation of a person to exceed "reasonable compensation," as defined in the Treasury Regulations to the Code and as determined by the Board of Directors. To the extent that any such payment is made, the amount of such payment may be reduced by any amount determined to exceed reasonable compensation. Any such reduction shall be determined by the Board of Directors. Further, if at any time the corporation is deemed to be a private foundation within the meaning of section 509 of the Code then, during such time, no payment shall be made under this Section if such payment would constitute an act of self-dealing or a taxable expenditure, as defined in section 4941(d) or section 4945(d), respectively, of the Code.

### III. VOLUNTEER LEADERSHIP AND ADVISORY GROUPS

## The Trustees Governance Bodies

#### Officers

Chair, Vice Chair, Treasurer, Secretary, President

Terms: Limited to six consecutive years

#### Board of Directors

Members: Maximum of 25, including officers

Meetings: Quarterly

Responsibilities: Trustees' governing body, working through Board committees

Terms: Three-year term, limited to nine consecutive years

#### Advisory Board

Members: Limited to 75

Meetings: Twice a year

Responsibilities: Serve as an ambassador for The Trustees, advise Board of Directors

Other Participation: May serve on Board, property, ad hoc, and other advisory committees

Terms: Three-year term, limited to nine consecutive years

#### Corporate Trustees

Members: Limited to 600

Meetings: Once a year at Annual Meeting

Responsibilities: Elect Officers, Board of Directors, Advisory Board, Corporate and Life Trustees

Other Participation: May serve on Board, ad hoc, and other advisory committees

Terms: Three-year term, no term limit

#### Life Trustees

Members: Not limited

Meetings: Once a year at Annual Meeting

Responsibilities: Elect Officers, Board of Directors, Advisory Board, Corporate and Life Trustees

Other Participation: May serve on Board, property, ad hoc, and other advisory committees

Terms: No term limit

#### Chairman's Council

Members: Not limited

Meetings: Twice a year

Responsibilities: Serve as an ambassador for The Trustees, advise Board of Directors

Other Participation: May serve on Board, property, ad hoc, and other advisory committees

Terms: Three-year term, no limit

## Conflict of Interest

### THE TRUSTEES CONFLICT OF INTEREST POLICY

In order to encourage trustworthy decision making and prudent behavior on the part of all those associated with The Trustees and the Massachusetts Land Conservation Trust, Inc., the Board of Directors hereby adopts the following policy regarding conflict of interest. All references to The Trustees shall be read as applying as well to the Massachusetts Land Conservation Trust, Inc.

#### Preamble

The Trustees' effectiveness depends upon maintaining the highest levels of credibility, confidence, and trust with the communities it serves and all parties with whom it works. It is essential to protect the organization's reputation for objectivity and fairness by identifying and appropriately dealing with actual, potential, and perceived conflicts of interest. All persons associated with The Trustees are reminded that the decisions and activities of the Board of Directors ("Board") and staff, whether or not addressed in this policy, are governed by an overriding requirement of honesty, good faith, and fiduciary responsibility for the organization and to the communities it serves.

#### Definition of Conflict of Interest

A conflict of interest exists when a covered person (as defined below)

- has a material financial interest in a transaction or project under consideration by the Board of Directors or a committee of The Trustees, or
- proposes to act on any issue, matter, or transaction in which The Trustees has an interest, and in which the covered person may have an interest separate from that of The Trustees.

A conflict of interest may also exist in situations when a covered person

- may be perceived to be utilizing, for his/her own benefit, inside information that is proprietary to The Trustees,
- is acting in his or her own interests rather than the best interests of The Trustees,
- has the ability to exercise undue influence over The Trustees' decisions, or
- is receiving favorable treatment by The Trustees because of his or her status as a covered person.

#### Covered Persons

This policy applies to the following people and to their close relatives (including spouse, domestic partner, child, sibling, parent, stepparent, parent- or sibling-in-law, grandchild, or grandparent):

- full- and part-time employees
- members of the Board of Directors
- members of Board committees or advisory committees
- major contributor or owners of land that is subject to a conservation restriction held by The Trustees (for the purposes of this policy a major contributor is defined as a person who has made contributions of \$10,000 or more in a single year)
- individuals such as volunteers or former employees who, because of their continued involvement with The Trustees, either have access to inside information that could place them in a conflicted situation or could give the appearance of having the ability to unduly influence The Trustees.

#### General Guidelines

All covered persons shall avoid conflict of interest involving their duties to The Trustees and any other interest or organization to which they have a duty, or any other activity in which they are financially or otherwise interested. It is expected that persons subject to this policy will conduct themselves under strict rules of honesty and fair dealing between themselves and The Trustees. Such persons shall not use their position or knowledge gained during their association with The Trustees for their private benefit nor to obtain an unfair advantage over any aspect of their dealings with The Trustees.

#### Obligations of Covered Persons

Each covered person is obliged:

1. To disclose to the president, staff supervisor, Board, or committee of the Board on which he or she serves, the existence of any actual, potential, or perceived conflict of interest. (The Trustees will provide forms for these disclosures.)
2. To abstain from discussing with Board members, employees, or committee members any issue, matter, or transaction in which he or she has an actual, potential, or perceived conflict of interest unless specifically asked by the Board or a Board committee to give information on the issue, matter, or transaction.
3. To absent himself or herself from Board and committee discussions on any issue, matter, or transaction involving a conflict of interest, unless requested by the Board or committee to give information on the issue, matter, or transaction. The minutes of any such meetings or discussions shall note the covered person's absence.



4. To abstain from voting on any such issue, matter, or transaction. The minutes of any meetings shall note the covered person's abstention.
5. When requested by the Board, to resign from the Board of Directors, advisory board, or committee until such time as the matter giving rise to the conflict of interest has been resolved. When, in the opinion of the Board Chair, the matter has been sufficiently resolved, the director may be invited to rejoin the Board, advisory board, or committee.
6. To disclose to the appropriate officer, or supervisor, or Board committee chair any attempt by another covered person to influence him/her on a matter that may be of personal interest to that person.

**Obligations of the Board of Directors and Board Committees in Conflicted Situations**

When a transaction, contract, or project of The Trustees involves an actual, potential, or perceived conflict of interest with a covered person, the Board of Directors and/or Board committees shall act as follows:

1. Approve such transaction, contract, or project only after making specific findings that:
  - (i) The transaction, contract, or project is fair and benefits The Trustees and its objectives; and
  - (ii) The transaction, contract, or project is approved with the Board's full knowledge of its financial or other benefit to the covered person who has the conflict of interest; and
  - (iii) When the covered person serves on the Board of Directors or a Board committee, the director or committee member did not participate in the vote approving the transaction, contract, or project and was, in fact, absent both during the discussion of the transaction, contract, or project and when the Board voted on it; and
  - (iv) A more advantageous arrangement could not have been obtained with reasonable effort; and
  - (v) Where the transaction involves purchase or disposition of an interest in real estate to or from a covered person, the following additional requirements shall apply:
    - a. Unless otherwise deemed by the Board to be in the best interests of the organization, The Trustees shall not purchase, sell or otherwise dispose of real estate from or to a covered person; and
    - b. When the purchase or disposition of real estate from or to a covered person is specifically approved by the Board, The Trustees shall first widely market the property in a manner sufficient to ensure that the property is sold at or above fair market value

and to avoid the reality or perception that the sale inappropriately benefited a covered person; and

- c. For purchase from or sale of property to any covered person, The Trustees shall obtain a qualified independent appraisal prepared by a state-licensed or state-certified appraiser who has verifiable conservation restriction or conservation real estate experience.
2. Certain committees of The Trustees' Board may adopt such further policies on conflicts of interest as may be deemed necessary or appropriate to the work of such committee, provided such further policies are approved by the Audit Committee and in the event of an inconsistency with the above policy, the above policy shall govern.
3. When warranted by the nature and magnitude of the conflict of interest, request that a conflicted member of the Board of Directors, Board committee, or other committee resign.
4. The Audit Committee, on an annual basis, shall review declared conflicts and report its findings to the Chair of the Board of Directors.

Approved: September, 2008

FOR REFERENCE ONLY

**CONFLICT DISCLOSURE AND ACKNOWLEDGEMENT  
OF CONFLICT OF INTEREST POLICY**

THE TRUSTEES OF RESERVATIONS

Please check all that apply:

Staff                       Officer

Board of Directors       Board Committee

Other \_\_\_\_\_

By my signature below, I, \_\_\_\_\_ certify that:

PLEASE PRINT YOUR NAME HERE

1. I have read, understand, and support The Trustees of Reservations Conflict of Interest Policy.
2. Please check one:
 

I have no conflict of interest to disclose.

I have a conflict of interest that requires disclosure (please describe):

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_  
SIGNATURE

\_\_\_\_\_  
DATE

## What is the role of the Board of Directors?

The Board of Directors is the group charged with ultimate fiduciary responsibility for the organization. Elected by the voting members of the Corporation (Corporate Trustees and Life Trustees) at the Annual Meeting, the Board of Directors meets at least four times a year and guides the operation of The Trustees between Annual Meetings. The President, the Chief Executive Officer of the corporation and head of the professional staff, reports to the Board of Directors.

At its regular meetings, the Board of Directors considers issues raised by committees of the Board and by staff, enacts policies to govern organizational operations, and authorizes major land acquisitions including the establishment of new reservations. Directors are chosen for a variety of reasons – their interest in The Trustees and its mission; their particular expertise; and their willingness to contribute time, money, and expertise – the traditional work, wealth, and wisdom. Generally, they have previously had extensive experience on various Trustees committees and/or have served as members of the Advisory Board.

Directors are expected to serve on at least one committee. It is at committee level that much of the work of the organization is done under policies and guidelines established by the Board.

Directors are expected to represent The Trustees: telling people about the organization, encouraging gifts of land, conservation restrictions, memberships, and contributions.

Because financial support is central to the effectiveness of The Trustees, it is expected that members of the Board of Directors will rank The Trustees among their top three charities and contribute financially to the organization at a leadership level, commensurate with personal means. They are also expected to support special projects from time to time and to include The Trustees in their estate plans.

Directors are urged to attend the Annual Meeting each year and are encouraged to attend regular events sponsored by The Trustees.

## Who is a Director?

- Peter B. Coffin**, *Chair*, Chestnut Hill MA
- Eunice Panetta**, *Vice Chair*, Manchester MA
- David D. Croll**, *Secretary*, Chestnut Hill MA
- Brian M. Kinney**, *Assistant Secretary*, Newton MA
- Neeti Bhalla Johnson**, Chestnut Hill MA
- Andrew P. Borggaard**, Marblehead MA
- William G. Constable**, Lincoln MA
- Andrew O. Davis**, Boston MA
- Elizabeth de Montrichard**, Boston MA
- Laura DeBonis**, Washington DC
- Philip J. Edmundson**, Hingham MA
- Uzochi C. Erlingsson**, Boston MA
- Thomas D. French**, Dover MA
- Edward G. Garmey**, Concord MA \*
- Linda Hammett Ory**, Lincoln MA
- Roland E. Hoch**, Concord MA
- Elizabeth L. Johnson**, Boston MA
- Julia G. Krapf**, Westport MA
- Edward H. Ladd**, Dover MA
- Martin Lempres**, Boston MA
- Robert H. Mason**, Lincoln MA
- Michael T. Prior**, Newburyport MA
- Cyrus Taraporevala**, Sherborn MA \*\*
- G. Scott Uzzell**, Boston MA
- Phyllis R. Yale**, Lexington MA

\* New Director

\*\* Ex Officio

## What is the role of the Advisory Board?

The duty of the Advisory Board is to advise staff and the Board of Directors on specific issues and to help develop strategic visions for Trustees. Most members also provide guidance through service on at least one committee of the Board. It is at the Board Committee level that much of the work of the organization is done and where most policy recommendations originate.

Members of the Advisory Board are chosen for their strong commitment to Trustees' mission and because they are willing to devote their time, financial resources, and wisdom to advancing its mission. Effort is made to recruit a wide range of expertise, regional representation, and diversity.

Advisory Board members can aid the organization in one or more of the following ways:

- Providing time and expertise through service on committees or advisory groups.
- Acting as an ambassador for the organization in their home community and their world of work, enhancing the organization's visibility and reputation.
- Connecting the organization to new and diverse communities.
- Identifying other individuals who can support, in all different ways, the organization.
- Being involved in specific land conservation, stewardship, or educational activities.
- Assisting in fundraising for both annual giving and capital projects.

Because financial support is central to the effectiveness of The Trustees, members of the Advisory Board are asked to support the Annual Fund at the Commonwealth Society (\$5,000 – \$9,999) level or above. Gifts may be made in installments and can include corporate matching gifts.

To further support the short-, medium- and long-term goals of the organization, Advisory Board members will be approached on occasion to purchase tickets or host tables for special events; asked to consider support of special projects and campaigns; and encouraged to give serious consideration to including The Trustees in their estate planning.

All members of the Advisory Board should be well-versed on the work of The Trustees and able to answer questions about the organization. They meet three times a year to consider emerging issues of importance; are invited to attend the Annual Meeting; attend a joint session with the Board of Directors; and are encouraged to attend other events designed to keep them informed and to foster their participation in the work of the organization.

## Who serves on the Advisory Board?

**Jeffrey Bellows**, *Chair*, Hingham MA  
**Michelle M. M. Abel**, Waban MA  
**James M. Alden**, Lincoln MA  
**Eleanor T. Andrews**, Cambridge MA  
**Margaret G. Bailey**, Danvers MA  
**Joanna Ballantine**, Amherst MA  
**Deborah J. Barker**, Boston MA  
**George P. Beal**, Boston MA  
**Richard M. Burnes, Jr.**, Boston MA  
**John G. Carey**, Gloucester MA  
**William D. Clark**, Dover MA  
**Richard M. Coffman**, Marblehead MA  
**Cecily C. Colburn**, Manchester MA  
**Karen S. Conway**, Boston MA  
**Lisette S. Cooper**, Lincoln MA  
**Brendan Coughlin**, Lincoln MA  
**Charles D. Esdaile**, Gloucester MA  
**Michael Even**, Manchester MA  
**Martha L. Gangemi**, Cohasset MA  
**Jade T. Gedeon**, Essex MA  
**Spencer P. Glendon**, Boston MA  
**Trevor C. Graham**, Hingham MA  
**Leslie W. Hammond**, Manchester MA  
**James H. Hammons, Jr.**, Cambridge MA  
**Mai Hanlon**, Waban MA  
**Christopher E. Hart**, Milton MA  
**Alexandra C. Hastings**, Boston MA \*  
**Cameron Hudson**, Dover MA  
**Bradley C. Irwin**, Lexington MA \*  
**Frederick N. Khedouri**, Menemsha MA  
**Joshua A. Klevens**, West Newton MA  
**Ann W. Lambertus**, Lexington MA \*  
**Peter K. Lambertus**, Lexington MA \*  
**Robert A. Larsen**, Roslindale MA  
**John D. Laupheimer, Jr.**, Lincoln MA  
**Marie LeBlanc**, Hyannis MA  
**Alexandra C. Liftman**, Newton MA  
**Molly Macleod**, Lincoln MA  
**Adam J. Margolin**, Boston MA \*  
**David C. McCabe**, Hingham MA

**Andrew J. McMorrow**, Carlisle MA  
**Pauline C. Metcalf**, New York NY  
**Amey D. Moot**, Dover MA  
**Katherine M. Morris**, Stockbridge MA  
**Albert A. Nierenberg**, Boxford MA  
**Christopher Oddleifson**, Cohasset MA  
**Jeryl Oristaglio**, Boston MA  
**Glenn P. Parker**, Lexington MA  
**Kirsten Poler**, Medfield MA \*  
**Jonathan H. Poorvu**, Cambridge MA  
**Jonathan Rapaport**, Lincoln MA  
**Carter S. Romansky**, Acton MA  
**Christopher A. Shepherd**, South Hamilton MA  
**Sukanya L. Soderland**, Winchester MA  
**Jonathan A. Soroff**, Newtonville MA  
**Arthur K. Steinert**, Manchester MA  
**Hope E. Suttin**, Waban MA  
**Richard Taggart**, Boston MA  
**Caroline E. Tall**, Sherborn MA \*  
**Yanni Tsipis**, Westwood MA  
**Melissa A. Tully**, Hingham MA  
**John Vasconcellos**, New Bedford MA  
**Bradford B. Wakeman**, North Andover MA  
**Andrew West**, Manchester MA  
**Marc Zawel**, Wellesley Hills MA

\* New Member



## What is the Chairman's Council?

The Chairman's Council was created in 1995 to honor former members of the Board of Directors and Advisory Board and recognize their past governance service. It also provides an opportunity for The Trustees to continue to benefit from the advice of experienced individuals. Accordingly, many members continue to serve on committees of the Board. It is at the Board Committee level that much of the work of The Trustees is done and where most policy recommendations originate.

Chairman's Council members can also aid the organization in one or more of the following ways:

- Providing time and expertise through service on committees or advisory groups.
- Acting as an ambassador for the organization in their home community and their world of work, enhancing the organization's visibility and reputation.
- Connecting the organization to new and diverse communities.
- Identifying other individuals who can support, in all different ways, the organization.
- Being involved in specific land conservation, stewardship, or educational activities.
- Assisting in fundraising for both annual giving and capital projects.

Because financial support is central to the effectiveness of The Trustees, members of the Council are asked to rank The Trustees among their top three charities and contribute financially to the organization at a level commensurate with personal means, where possible, at least at the level of the 1891 Society (\$1,000 – \$2,499) or the Charles Eliot Society (\$2,500 or more). Members of the Council are also asked to strongly consider a legacy giving conversation and joining the Semper Virens Society.

All members of the Council should be well-versed on the work of The Trustees and able to answer questions about the organization. They meet twice a year to consider emerging issues of importance; are invited to attend the Annual Meeting; and are encouraged to attend other events designed to keep them informed and to foster their participation in the work of the organization.

## Who is on the Chairman's Council?

**Amy L. Auerbach**, *Chair*, Wellesley MA  
**Lee Albright**, Brookline MA  
**Clement C. Benenson**, Hamilton MA  
**Steven A. Bercu**, Cambridge MA  
**Tatiana Bezamat**, Hamilton MA  
**Laura Bibler**, West Newbury MA  
**Jane L. Bihldorff**, Canton MA  
**Sarah Hunt Broughel**, Auburndale MA  
**Ronald Brown**, Brookline MA  
**Lalor Burdick**, Newton Centre MA  
**Rebecca G. Campbell**, Manchester MA  
**Liza R. Carey**, Concord MA  
**Sharon Casdin**, New York NY  
**Robert A. Clark**, Petersham MA  
**William C. Clendaniel**, Boston MA  
**Frances Colburn**, Manchester MA  
**Susanna Colloredo-Mansfeld**, Hamilton MA  
**Mary Campbell Cooper**, South Egremont MA  
**David L. Costello**, Marblehead MA  
**Peter H. Creighton**, Manchester MA  
**John P. DeVillars**, Boston MA  
**Walter C. Donovan**, Boston MA \*  
**James V. Ellard, Jr.**, Boxford MA  
**Jeffrey B. Fager**, New Canaan CT  
**Ronald L. Fleming**, Cambridge MA  
**Allen W. Fletcher**, Worcester MA  
**David R. Foster**, Cambridge MA  
**Ann C. Galt**, Pittsfield MA  
**Elizabeth W. Gordon**, Norwell MA  
**Marjorie D. Greville**, South Dartmouth MA  
**Gale R. Guild**, Westwood MA  
**Douglas B. Harding**, Lincoln MA  
**Carter H. Harrison**, Manchester MA  
**Nathan Hayward, III**, Montchanin DE  
**Thomas J. Healey**, New Vernon NJ  
**John K. Herbert, III**, Charlestown MA  
**Eloise W. Hodges**, Boston MA  
**Paul S. Horovitz**, Gloucester MA  
**James S. Hoyte**, Lexington MA

**Lily Rice Hsia**, South Hamilton MA  
**Janice G. Hunt**, Needham MA  
**Stephen B. Jeffries**, Boston MA  
**Elizabeth B. Johnson**, Boston MA  
**Charles F. Kane, Jr.**, Duxbury MA  
**Stephen B. Kay**, Chestnut Hill MA  
**Jonathan M. Keyes**, Concord MA  
**Edward H. Ladd**, Dover MA  
**Theodore C. Landsmark**, Jamaica Plain MA  
**David I. Lewis**, Ashburnham MA  
**George E. Lewis, Sr.**, Sherborn MA  
**Deborah Logan**, Ipswich MA  
**Charles R. Longworth**, Amherst MA  
**Caleb Loring, III**, Prides Crossing MA  
**Jonathan B. Loring**, Prides Crossing MA  
**Peter E. Madsen**, Chestnut Hill MA  
**Eli Manchester, Jr.**, Westwood MA  
**Katherine J. McMillan**, Gloucester MA  
**Wilhelm M. Merck**, Hamilton MA  
**John O. Mirick**, Princeton MA  
**Sara Molyneaux**, Dover MA  
**Brian W. Monnich**, Hingham MA  
**W. Hugh M. Morton**, Westport MA  
**Virginia M. Murray**, Plymouth MA  
**Scott A. Nathan**, Washington DC  
**Thomas H. Nicholson**, Weston MA  
**Nicholas W. Noon**, Cohasset MA  
**Julia B. O'Brien**, Roslindale MA  
**Thomas L. P. O'Donnell**, Hingham MA  
**Ronald P. O'Hanley, III**, Boston MA  
**Kathryn P. O'Neil**, Prides Crossing MA  
**Carolyn M. Osteen**, Boston MA  
**Russell J. Peotter**, Chesterfield MA  
**Richard F. Perkins**, Stow MA  
**Samuel Plimpton**, Boston MA  
**Beatrice A. Porter**, Cambridge MA  
**Margaret L. Poutasse**, Lenox MA  
**Hillary H. Rayport**, Boston MA  
**Gene E. Record, Jr.**, Marblehead MA  
**Henry S. Reeder, Jr.**, Weston MA  
**G. Neal Ryland**, Beverly MA  
**Jane Saltonstall**, Manchester MA  
**Stanley L. Schantz**, Middleton MA

**David W. Scudder**, Ipswich MA  
**Mary Waters Shepley**, Bedford MA  
**William Shields**, Hamilton MA  
**Norton Q. Sloan, Jr.**, Ipswich MA  
**F. Sydney Smithers, IV**, North Pownal VT  
**Caroline D. Standley**, Medfield MA  
**Augusta Perkins Stanislaw**, Cambridge MA  
**Margaret E. Steiner**, Middletown RI  
**Elliot M. Surkin**, Brookline MA  
**Jane M. Talcott**, Westwood MA  
**Patricia R. Ternes**, Sherborn MA  
**John E. Thomas, Sr.**, Clearwater Beach FL  
**Julie M. Viola**, Carlisle MA  
**Natalia K. Wainwright**, Hamilton MA  
**William F. Weld**, Canton MA  
**R. Angus West**, Wenham MA  
**Susan S. Winthrop**, Ipswich MA

\* New Council Member

## What is a Life Trustee?

Life Trusteeship is one of the highest honors conferred by The Trustees. It recognizes those who have made extraordinary gifts of property, financial assets, or service to The Trustees. Life Trustees are elected by a vote of Corporate and Life Trustees at the Annual Meeting upon recommendation of the Board of Directors.

Life Trustees have all the functions and responsibilities of a Corporate Trustee but are not subject to election every three years and, as the name implies, serve for life. They are shareholders in the organization and members of the charitable corporation. They vote each year at the Annual Meeting (either in person or by proxy) to elect the officers, Board of Directors, Advisory Board, and new Corporate and Life Trustees.

Life Trustees are expected to be members of The Trustees and to evidence a willingness to contribute financially to the Annual Appeal at a level commensurate with personal means, where possible, at least at the level of the 1891 Society (\$1,000 – \$2,499), along with a commitment to assist in obtaining financial support from others. It is also hoped that they will support special projects from time to time and give serious consideration to including The Trustees in their estate plans or making a planned gift.

Life Trustees are encouraged to continue their support of The Trustees in one or more of the following kinds of activities:

- Spreading the word in their residential and business communities about The Trustees' work, enhancing the organization's visibility and reputation, and identifying other individuals who can support the organization.
- Providing time and expertise through personal involvement with local property committees or regional advisory councils.
- Being involved in specific land conservation projects.
- Assisting in fundraising for both annual giving and capital projects. Life Trustees are invited to attend the Annual Meeting each year and The Trustees are honored to welcome them at any regular events sponsored by the organization.

## Who is a Life Trustee?

**Lee Albright**, Brookline MA  
**Elsie J. Apthorp**, Harvard MA  
**Wilhelmina V. L. Batchelder-Brown**, Santa Rosa CA  
**Nancy B. Bates**, Weston MA  
**Frances Colburn**, Manchester MA  
**Sylvia P. Constable**, Sherborn MA  
**John Fiske**, Bloomfield CT  
**Alan F. French**, Andover MA  
**Dorothy C. Fullam**, Princeton, NJ  
**Ralph D. Gordon**, Norwell MA  
**Elizabeth W. Gordon**, Norwell MA  
**Gale R. Guild**, Westwood MA  
**Roslyn E. Harrington**, Monson MA  
**Nathan Hayward, III**, Montchanin DE  
**Janice G. Hunt**, Needham MA  
**Elizabeth B. Johnson**, Boston MA  
**Andrew W. Kendall**, West Newton MA  
**John W. Kimball**, Andover MA  
**Catherine C. Lastavica**, Manchester MA  
**Edward P. Lawrence**, Brookline MA  
**James Lawrence, III**, Baltimore MD  
**Robert P. Lawrence**, San Francisco CA  
**George E. Lewis, Sr.**, Sherborn MA  
**Susan P. Little**, Newbury MA  
**Pamela Fezandie Lohmann**, Nantucket MA  
**W. Hugh M. Morton**, Westport MA  
**Thomas L. P. O'Donnell**, Hingham MA  
**May H. Pierce**, Dedham, MA  
**Rebekah Richardson**, Nahant MA  
**Jane Saltonstall**, Manchester MA  
**David W. Scudder**, Ipswich MA  
**Mary Waters Shepley**, Bedford MA  
**Norton Q. Sloan, Jr.**, Ipswich MA  
**F. Sydney Smithers, IV**, North Pownal VT  
**Caroline D. Standley**, Medfield MA  
**Elliot M. Surkin**, Brookline MA  
**Pamela B. Weatherbee**, Williamstown MA  
**R. Angus West**, Wenham MA  
**Frederic Winthrop, Jr.**, Ipswich MA

## What is a Corporate Trustee?

The basic duty of Corporate Trustee is to elect the Board of Directors, the Advisory Board, Corporate Trustees, and Life Trustees at each Annual Meeting by attending in person or by providing a proxy vote prior to the meeting. This is a first point of entry for most to volunteer leadership and a baseline Governance designation. All members of Trustees Governance are Corporate Trustees.

Corporate Trustees are chosen for their strong commitment to the Trustees mission and because they are willing to devote their time, financial resources, and wisdom to advancing its mission. Effort is made to recruit a wide range of expertise, regional representation, and diversity.

Corporate Trustees can aid the organization in one or more of the following ways:

- Providing time and expertise through service on committees or advisory groups.
- Acting as an ambassador for the organization in their home community and their world of work, enhancing the organization's visibility and reputation.
- Connecting the organization to new and diverse communities.
- Identifying other individuals who can support, in all different ways, the organization.
- Being involved in specific land conservation, stewardship, or educational activities.
- Assisting in fundraising for both annual giving and capital projects.

Because financial support is central to the effectiveness of the organization, Corporate Trustees are asked to support the Annual Fund at The 1891 Society (\$1,000 – \$2,499) level or above. Gifts may be made in installments and can include corporate matching gifts.

To further support the short-, medium- and long-term goals of the organization, Corporate Trustees will be approached on occasion to purchase tickets or host tables for special events; asked to consider support of special projects and campaigns; and encouraged to give serious consideration to including The Trustees in their estate planning.

All Corporate Trustees should be well-versed on the work of The Trustees and able to answer questions about the organization. They are invited to attend the Annual Meeting each year, and are encouraged to attend other events designed to keep them informed and to foster their participation in the work of the organization.

## Who is a Corporate Trustee?

**Thomas F. Aaron**, Westwood MA  
**Michelle M. Abel**, Waban MA  
**Lee Albright**, Brookline MA  
**James M. Alden**, Lincoln MA  
**Katharine P. Allison**, Cambridge MA  
**Jeffrey F. Allsopp**, Hamilton MA  
**Barbara H. Almy**, Manchester MA  
**Robert Alsop**, Tyringham MA  
**Suzette Alsop**, Tyringham MA  
**Manuel F. Álvarez-González**, Amesbury MA  
**Charles C. Ames**, Scituate MA  
**Kathleen L. Ames**, Scituate MA  
**Eleanor Andrews**, Cambridge MA  
**Jared Anello**, Stowe VT  
**Olivier J. Aries**, Arlington MA  
**Amy L. Auerbach**, Wellesley MA  
**Michele Austin**, Hingham MA  
**Margaret G. Bailey**, Danvers MA  
**Joanna Ballantine**, Amherst MA  
**Deborah J. Barker**, Boston MA  
**David A. Barrett**, Marion MA  
**Christine F. Battat**, Weston MA \*  
**Susan Baxter**, Shirley MA  
**George P. Beal**, Boston MA  
**Gina Beinecke**, Manchester MA  
**Jeffrey Bellows**, Hingham MA  
**Nicole J. Bellows**, Hingham MA \*  
**Priscilla J. Bender**, Bronxville NY  
**Clement C. Benenson**, Hamilton MA  
**Stephanie T. Benenson**, Hamilton MA  
**Steven A. Bercu**, Cambridge MA  
**Lorri Berenberg**, Arlington MA  
**Lila W. Berle**, Stockbridge MA  
**Rebecca Belmont**, Lincoln MA \*  
**Tatiana Bezamat**, Hamilton MA  
**Neeti Bhalla Johnson**, Chestnut Hill MA  
**Laura Bibler**, West Newbury MA  
**Jane L. Bihldorff**, Canton MA  
**Theodore C. Bililies**, Natick MA \*  
**Mark H. Bissell**, Scituate MA  
**Isabelle T. Black**, Manchester By the Sea MA  
**Martha Bohlin**, Dover MA  
**Andrew P. Borggaard**, Marblehead MA



**Nonie Brady**, Hamilton MA  
**Irene S. Briedis**, Bozeman MT  
**Thomas R. Bright**, Hingham MA  
**Kathleen Brill**, Hamilton MA  
**Michael Bronner**, Boston MA  
**John F. Brooke**, Concord MA  
**Lisa A. Brothers**, Wilmington MA  
**Sarah Hunt Broughel**, Auburndale MA  
**Cornelia W. Brown**, Brookline MA  
**Richard M. Brown**, Cornelius NC  
**Ronald Brown**, Brookline MA  
**Lalor Burdick**, Newton Centre MA  
**John A. Burgess**, Boston MA  
**Richard M. Burnes**, Boston MA  
**John R. Cabot**, Prides Crossing MA  
**Anthony B. Cahill, Jr.**, Nantucket MA  
**Rebecca G. Campbell**, Manchester MA  
**Richard J. Canty**, Vero Beach FL  
**John G. Carey**, Gloucester MA  
**Liza R. Carey**, Concord MA  
**Eli D. Casdin**, New York NY  
**Sharon Casdin**, New York NY  
**Frances R. Caudill**, Manchester MA  
**James Cavan**, Dover MA \*  
**Jonathan Chatinover**, Edgartown MA  
**Richard H. Churchill, Jr.**, Concord MA  
**Robert A. Clark**, Petersham MA  
**William D. Clark**, Dover MA  
**William C. Clendaniel**, Boston MA  
**Peter B. Coffin**, Chestnut Hill MA  
**Richard M. Coffman**, Marblehead MA  
**Cecily C. Colburn**, Manchester MA  
**Frances Colburn**, Manchester MA  
**Barbara G. Cole**, Hopewell NJ  
**Emily Collins**, Ipswich MA  
**John J. Collins**, South Hamilton MA  
**Franz Colloredo-Mansfeld**, Hamilton MA  
**Susanna Colloredo-Mansfeld**, Hamilton MA  
**Patrick Connelly**, Harvard MA  
**William G. Constable**, Lincoln MA  
**Karen S. Conway**, Boston MA  
**Lisette S. Cooper**, Lincoln MA  
**Mary Campbell Cooper**, South Egremont MA  
**David L. Costello**, Marblehead MA  
**Brendan Coughlin**, Lincoln MA

**Bonnie G. Covington**, Gloucester MA  
**Christopher H. Covington**, Boston MA  
**Roger W. Crandall**, Boston MA  
**Patty Crane**, Dalton MA  
**Albert M. Creighton, III**, Manchester MA  
**Peter H. Creighton**, Manchester By the Sea MA  
**Christopher Y. Crockett**, Ipswich MA  
**David D. Croll**, Chestnut Hill MA  
**Matthew Daniels**, South Hamilton MA  
**Andrew O. Davis**, Boston MA  
**Jonathan G. Davis**, Chestnut Hill MA  
**Susan W. Davis**, Cohasset MA  
**Laura DeBonis**, Washington DC  
**Eileen R. DeCastro**, Boylston MA  
**Edmund P. DeLaCour**, Northampton MA  
**Jane C. Demers**, Andover MA  
**Natalie R. DeNormandie**, Wayland MA  
**John P. DeVillars**, Boston MA  
**Peter Diana**, Wellesley MA  
**James R. Dodge**, Worthington MA  
**Cynthia Doe**, Hingham MA  
**Walter C. Donovan**, Boston MA  
**Peter B. Dow**, Buffalo NY  
**Deirdre L. Dow-Chase**, Largo FL  
**David Doyle**, Jamaica Plain MA  
**Andrew C. Dreyfus**, Boston MA  
**J. W. Dunlaevy**, Lenox MA  
**Denis C. Duquette**, Monson MA  
**Philip J. Edmundson**, Hingham MA  
**Lawrence G. Eliot**, Ipswich MA  
**Peter L. Eliot**, Ipswich MA  
**James V. Ellard, Jr.**, Boxford MA  
**Betty M. Ellis**, Gloucester MA  
**Uzochi C. Erlingsson**, Boston MA  
**Charles D. Esdaile**, Gloucester MA  
**Sarah E. Eustis**, Stockbridge MA  
**Richard M. Evans**, Northampton MA  
**Michael Even**, Manchester MA  
**Jeffrey B. Fager**, New Canaan CT  
**Melinda W. Fager**, New Canaan CT  
**John D. Farina, Jr.**, Palm Beach Gardens FL  
**Benjamin M. Faucett**, Weston MA  
**Loren B. Feingold**, Weston MA \*  
**George F. Fiske, Jr.**, Sherborn MA  
**John F. Fiske**, Winchester MA

**Ronald L. Fleming**, Cambridge MA  
**Allen W. Fletcher**, Worcester MA  
**Alice L. Flint**, Lincoln MA  
**Janet G. Foley**, North Andover MA  
**Chris Ford**, South Hamilton MA  
**David R. Foster**, Cambridge MA  
**Gerard D. Frank**, Lexington MA  
**Jascha Franklin-Hodge**, Jamaica Plain MA  
**Thomas D. French**, Dover MA  
**Richard D. Frisbie**, Boston MA  
**Ann C. Galt**, Pittsfield MA  
**John Galt**, Pittsfield MA  
**Martha L. Gangemi**, Cohasset MA  
**Edward G. Garmey**, Concord MA  
**William D. Gause**, Essex MA  
**Jade T. Gedeon**, Essex MA  
**Bartlett R. Geer**, Manchester MA  
**Christina P. Glen**, Osterville MA \*  
**Spencer P. Glendon**, Boston MA  
**Susan C. Glessner**, Ipswich MA  
**Alexandra Glover**, Great Barrington MA  
**Christopher J. Goolgasian**, Lincoln RI \*  
**Daniel A. Grady**, Needham MA \*  
**Trevor C. Graham**, Hingham MA  
**Nancy B. Gray**, Hingham MA  
**Susan J. Gray**, Rockport MA  
**Marjorie D. Greville**, South Dartmouth MA  
**Lawrence A. Griffin**, South Hamilton MA  
**Kelly J. Guarino**, Boston MA  
**Gale R. Guild**, Westwood MA  
**Benjamin W. Guy, III**, Westport Point MA  
**Leslie W. Hammond**, Manchester MA  
**James H. Hammons**, Cambridge MA  
**Mai Hanlon**, Waban MA  
**Craig C. Hannafin**, North Marshfield MA  
**David R. Harding**, Lincoln MA  
**Douglas B. Harding**, Lincoln MA  
**Elisabeth Harper**, Newton MA  
**Carter H. Harrison**, Manchester MA  
**Christopher E. Hart**, Milton MA  
**Katrina B. Hart**, Hamilton MA  
**Keith D. Hartt**, Weston MA  
**Alexandra C. Hastings**, Boston MA \*  
**Wilmot R. Hastings**, Cumington MA  
**Elizabeth E. Hatch**, Ipswich MA

**Thomas P. Hayes**, Boston MA  
**Nathan Hayward, III**, Montchanin, DE  
**Thomas J. Healey**, New Vernon, NJ  
**Christie P. Hedges**, Orford NH  
**Jeremy D. Henderson**, Larchmont NY  
**John K. Herbert, III**, Charlestown MA  
**Cynthia S. Hibbard**, Cambridge MA  
**Roland E. Hoch**, Concord MA  
**Arthur C. Hodges**, Boston MA  
**Eloise W. Hodges**, Boston MA  
**Howard B. Hodgson, Jr.**, Ipswich MA  
**Jeff M. Hoffman**, Andover MA  
**Howard Hoople**, Andover MA  
**Paul S. Horovitz**, Gloucester MA  
**Jeffrey E. Horvitz**, Beverly MA  
**Amos B. Hostetter, Jr.**, Boston MA  
**James S. Hoyte**, Lexington MA  
**Lily Rice Hsia**, South Hamilton MA  
**Cameron Hudson**, Dover MA  
**Walter Hunnewell, Jr.**, Wellesley MA  
**Alfred J. Hunt**, Lincoln MA  
**Janice G. Hunt**, Needham MA  
**Laura Iorio**, Millis MA  
**Bradley C. Irwin**, Lexington MA \*  
**Kate James**, Concord MA  
**Stephen B. Jeffries**, Boston MA  
**Kristina G. Jelleme**, Nantucket MA  
**Edward C. Johnson, III**, Boston MA  
**Elizabeth B. Johnson**, Boston MA  
**Elizabeth L. Johnson**, Boston MA  
**Robert A. Jonas**, Northampton MA  
**Bradley W. Jones**, Beverly MA  
**David B. Jones**, Boston MA  
**Charles F. Kane, Jr.**, Duxbury MA  
**Holly M. Ketron**, Tyngham MA  
**Jonathan M. Keyes**, Concord MA  
**Frederick N. Khedouri**, Menemsha MA  
**Judith J. King**, Essex MA  
**Brian M. Kinney**, Newton MA  
**Celia Kittredge**, Tyngham MA  
**Joshua A. Klevens**, West Newton MA  
**Jeffrey R. Kontoff**, Chicopee MA  
**Julia G. Krapf**, Westport MA  
**William P. Kupper, Jr.**, Bonita Springs FL  
**Edward H. Ladd**, Dover MA

**Philip L. Laird**, Cambridge MA  
**Antonia P. Lake**, Worthington MA  
**Ann W. Lambertus**, Lexington MA \*  
**Peter K. Lambertus**, Lexington MA \*  
**Theodore C. Landsmark**, Jamaica Plain MA  
**Gertrude Lanman**, Newton Highlands MA  
**Jeremy Lapon**, Norfolk MA  
**Robert A. Larsen**, Roslindale MA  
**John D. Laupheimer**, Lincoln MA  
**Marie LeBlanc**, Hyannis MA  
**Paul R. LeBlanc**, Richmond MA  
**Jeffrey M. Leiden**, Boston MA  
**Martin Lempres**, Boston MA  
**Rayna N. Lesser Hannaway**, Prides Crossing MA  
**David I. Lewis**, Ashburnham MA  
**George E. Lewis, Sr.**, Sherborn MA  
**Lisa S. Lewis**, Newport RI  
**Alexandra C. Liftman**, Newton MA  
**Deborah Logan**, Ipswich MA  
**Gregory Lomanno**, Medfield MA  
**Charles R. Longsworth**, Amherst MA  
**Caleb Loring, III**, Prides Crossing MA  
**Jonathan B. Loring**, Prides Crossing MA  
**Justin Lynch**, Hingham MA  
**Molly Macleod**, Lincoln MA  
**John MacNeish**, Ware MA  
**Peter E. Madsen**, Chestnut Hill MA  
**Eli Manchester, Jr.**, Westwood MA  
**Adam J. Margolin**, Boston MA \*  
**William B. Marsh**, Cambridge MA  
**William J. Martin**, Boston MA  
**Erica A. Mason**, Lincoln MA  
**Robert H. Mason**, Lincoln MA  
**Daniel K. Mayer**, Essex MA  
**Anne S. Mazar**, Mendon MA  
**David C. McCabe**, Hingham MA  
**Thomas A. McCrumm**, Ashfield MA  
**H. B. McEver**, Salisbury CT  
**James T. McGuinness**, Boston MA  
**Kathleen T. McIntyre**, Hamilton MA  
**Katherine J. McMillan**, Gloucester MA  
**Andrew J. McMorrow**, Carlisle MA  
**Deneen McQueen-Chippari**, Hingham MA  
**Wilhelm M. Merck**, Hamilton MA  
**Tamsen Merrill**, Ashfield MA

**Pauline C. Metcalf**, New York NY  
**Robert T. Metcalf**, Beverly MA  
**Susan Mikula**, Cummington MA  
**Elizabeth C. Minot**, Dover MA  
**John O. Mirick**, Princeton MA  
**Sara Molyneaux**, Dover MA  
**Brian W. Monnich**, Hingham MA  
**Elizabeth de Montrichard**, Boston MA  
**Amey D. Moot**, Dover MA  
**Keith N. Morgan**, Boston MA  
**Katherine M. Morris**, Stockbridge MA  
**Daniel J. Morrow**, Ipswich MA  
**Christopher Morss**, Sherborn MA  
**W. Hugh M. Morton**, Westport MA  
**Deborah W. Moses**, Boston MA  
**Virginia M. Murray**, Plymouth MA  
**Scott A. Nathan**, Washington DC  
**Gregory A. Netland**, Boxford MA  
**James R. Newland**, Monson MA  
**Thomas H. Nicholson**, Weston MA  
**Albert A. Nierenberg**, Boxford MA  
**Nicholas W. Noon**, Cohasset MA  
**Birch S. Norton**, Ipswich MA  
**Michael R. Nowlan**, Needham MA  
**Julia B. O'Brien**, Roslindale MA  
**Christopher Oddleifson**, Cohasset MA  
**Thomas L. P. O'Donnell**, Hingham MA  
**David G. Offensend**, Boston MA  
**Janet M. Offensend**, Boston MA  
**Ronald P. O'Hanley, III**, Boston MA  
**Kathleen J. O'Hara**, Concord MA  
**Stephen P. Oliver**, Hingham MA  
**Kathryn P. O'Neil**, Prides Crossing MA  
**Jeryl Oristaglio**, Boston MA  
**Linda Hammett Ory**, Lincoln MA  
**Carolyn M. Osteen**, Boston MA  
**Matthew H. O'Toole**, Swampscott MA  
**Elizabeth Owens**, Boston MA  
**Susan W. Paine**, Cambridge MA  
**Jill Palese**, Hingham MA  
**Eunice Panetta**, Manchester MA  
**Melany Park**, Cambridge MA  
**Arthur H. Parker**, Barrington RI  
**Faith Parker**, Lexington MA  
**Glenn P. Parker**, Lexington MA

**Oliver Parker**, Beverly MA  
**Alan Pasnik**, Newton Highlands MA  
**Bradford J. Paul**, Ardmore PA  
**Russell J. Peotter**, Chesterfield MA  
**Calixto Perez**, Boston MA  
**Richard F. Perkins**, Stow MA  
**Daniel Pierce, Jr.**, Westborough MA  
**Suzanne Pinto**, Manchester MA  
**Samuel Plimpton**, Boston MA  
**Kirsten Poler**, Medfield MA \*  
**Vida E. Poole**, Waltham MA  
**Amy G. Poorvu**, Cambridge MA  
**Jonathan H. Poorvu**, Cambridge MA  
**Dana G. Pope**, Sherborn MA  
**Catherine Popper**, Lincoln MA \*  
**Beatrice A. Porter**, Cambridge MA  
**Jeffrey W. Potter**, Weston MA  
**Susan K. Potter**, Manchester MA  
**Margaret L. Poutasse**, Lenox MA  
**Michael T. Prior**, Newburyport MA  
**Mary W. Pruett**, Beverly MA  
**Paul T. Przybyla**, Shirley MA  
**Nathaniel Pulsifer**, Ipswich MA  
**Jonathan Rapaport**, Lincoln MA  
**Anna W. Rasmussen**, Concord MA  
**Hillary H. Rayport**, Boston MA  
**Gene E. Record, Jr.**, Marblehead MA  
**Brooke G. Redmond**, Concord MA  
**Cynthia S. Reed**, Duxbury MA  
**Marcy L. Reed**, Sturbridge MA  
**Henry S. Reeder, Jr.**, Weston MA  
**J. Stanley Reeve**, Prides Crossing MA  
**George A. Reilly**, Hardwick MA  
**Margaret M. Reiser**, Brookline MA  
**Dominica M. Ribeiro**, Attleboro MA \*  
**Betsy Ridge Madsen**, Essex MA  
**Louise C. Riemer**, Chestnut Hill MA  
**Bruce Ringwall**, Nashua NH  
**Darrol G. Roberts**, Wareham MA  
**Anthony Rochte**, Hingham MA  
**Bradford D. Rodney**, New York NY  
**Carter S. Romansky**, Acton MA  
**Theodore Roosevelt, IV**, Edgartown MA  
**Johanna H. Ross**, Newton MA  
**G. Neal Ryland**, Beverly MA

**Jane Saltonstall**, Manchester MA  
**Stanley L. Schantz**, Middleton MA  
**Rene Schweickhardt**, Medfield MA  
**Letitia W. Scott**, Manchester MA  
**Robb Scott**, Boston MA  
**Robert H. Scott**, Weston MA  
**David W. Scudder**, Ipswich MA  
**Naomi O. Seligman**, New York NY  
**Roger T. Servison**, Brookline MA  
**Kate Shamon-Rushford**, Wellesley MA  
**L. Dennis Shapiro**, Nantucket MA  
**Christopher A. Shepherd**, South Hamilton MA  
**Mary Waters Shepley**, Bedford MA  
**Harriet H. Shields**, Hamilton MA  
**William Shields**, Hamilton MA  
**Regan Shields Ives**, Rockport MA  
**Heidi H. Siegrist**, Harvard MA  
**John L. Simons**, North Andover MA  
**Norton Q. Sloan, Jr.**, Ipswich MA  
**Sandra Sloan**, Ipswich MA  
**Jason Slocum**, Dedham MA  
**Phyllis Smith**, Dover MA  
**F. Sydney Smithers, IV**, North Pownal VT  
**Sukanya L. Soderland**, Winchester MA  
**Hilary Somers Deely**, Stockbridge MA  
**Jonathan A. Soroff**, Newtonville MA  
**Lionel B. Spiro**, Edgartown MA  
**John B. Stanbury**, Ipswich MA  
**Caroline D. Standley**, Medfield MA  
**Augusta Perkins Stanislaw**, Cambridge MA  
**Richard R. Stebbins, Jr.**, New York NY  
**Margaret E. Steiner**, Middletown RI  
**Arthur K. Steinert**, Manchester MA  
**Anne Stetson**, Boston MA \*  
**Howard H. Stevenson**, Cambridge MA  
**Catherine M. Stone**, Marion MA  
**R. G. Stone**, Newton Centre MA  
**Mimi E. Storey**, Essex MA  
**Mary Ann Streeter**, Wenham MA  
**Edward Sullivan**, Dover MA  
**Dawn M. Sung**, Weston CT  
**Carol F. Surkin**, Brookline MA  
**Elliot M. Surkin**, Brookline MA  
**Hope E. Suttin**, Waban MA  
**Richard Taggart**, Boston MA



**Jane M. Talcott**, Westwood MA  
**Margaret M. Talcott**, Brookline MA  
**Caroline Tall**, Sherborn MA  
**Cyrus Taraporevala**, Sherborn MA  
**Patricia R. Ternes**, Sherborn MA  
**John E. Thomas, Sr.**, Clearwater Beach FL  
**Thomas S. Tilghman**, Lakeland FL  
**George E. Triantaris**, Harvard MA  
**Kelley Truchan**, Hingham MA  
**Yanni Tsipis**, Westwood MA  
**Denise L. Tucker**, Hingham MA  
**Carol E. Tully**, Hingham MA  
**Melissa A. Tully**, Hingham MA  
**Susan T. Turner**, Peabody MA  
**G. Scott Uzzell**, Boston MA  
**Elizabeth H. Valentine**, Holderness NH  
**John Vasconcellos**, New Bedford MA  
**Sanjeev Verma**, Lincoln MA  
**Karen von Loesecke**, Hingham MA  
**Ernst H. von Metzsch**, Manchester MA  
**Margaret A. Waggoner**, Goshen MA  
**Natalia K. Wainwright**, Hamilton MA  
**Bradford B. Wakeman**, North Andover MA  
**Samuel W. Wakeman**, Cohasset MA  
**David E. Walker**, Chestnut Hill MA  
**Norman S. Walker**, Ashfield MA  
**Thomas P. Walsh**, Topsfield MA  
**Janet G. Walsmith**, Hingham MA  
**Joe M. Walsmith**, Hingham MA  
**Nathaniel Y. Walton**, Boston MA  
**Elissa Warner**, Cambridge MA  
**Kathy L. Washburn**, Somerville MA  
**William S. Wasserman, Jr.**, Ipswich MA  
**Solomon B. Watson, IV**, New York NY  
**Steven C. Webb**, Portsmouth NH  
**Melinda Webster Loof**, Lincoln MA  
**Cynthia W. Welch**, Richmond MA \*  
**Keith K. Wentzel**, North Andover MA  
**Lynn S. Wentzel**, North Andover MA  
**Andrew West**, Manchester MA  
**Megan West**, Manchester MA  
**R. Angus West**, Wenham MA  
**Sally S. Willis**, Sherborn MA

**Frederic H. Winthrop, III**, Ipswich MA  
**Susan S. Winthrop**, Ipswich MA  
**Martin A. Wohl**, Northampton MA  
**Christopher J. Wolf**, Essex MA \*  
**Sarah M. Wolfgang**, Manchester MA \*  
**Richard S. Wood**, Dover MA  
**Michael J. Woodall**, Boston MA  
**Julia Woodard**, Westwood MA  
**Nancy C. Woolford**, Topsfield MA  
**Claudia S. Wu**, Newton MA  
**Phyllis R. Yale**, Lexington MA  
**S. M. Yonce, Jr.**, Hamilton MA  
**Mandy M. Young**, Concord MA  
**Michael J. Zak**, Concord MA  
**Marc Zawel**, Wellesley Hills MA  
**Meghan Zipin**, Hampton Falls NH  
**Joanne Zitek**, Boston MA

\* New Corporate Trustee

## IV. Board Committees

Members of Governance participate in active committees across the organization. They serve as advisors, critical thinkers, and advocates in support of the staff and mission of The Trustees. The following is a list of Board-level committees and duties. At times we also create Taskforces, as necessary to help with ad hoc, time-specific, and/or sensitive issues and priorities. Please contact our Development office for more information on opportunities to serve on one of these Committees or Taskforces, at 978.870.1299 or [development@thetrustees.org](mailto:development@thetrustees.org).

### Agriculture Committee

*Chair: Roland Hoch*

*Executive Lead: Jocelyn Forbush, Acting President and CEO*

The Agriculture Committee is a committee responsible, under policy and guidelines approved by the Board, for oversight of the Agriculture and Urban Garden Program work of the organization.

### Boston Committee

*Chair: Elizabeth de Montrichard*

*Executive Lead: Christine Morin, Chief, Places and Engagement*

The Boston Committee is a committee responsible, under policy and guidelines approved by the Board, for oversight of the Boston area work of the organization.

### Cultural Resources Committee

*Chair: Nicie Panetta*

*Executive Lead: Matt Montgomery, Chief, Marketing and Audience Development*

The Cultural Resources Committee is responsible, under policies and guidelines approved by the Board, for oversight of the Cultural Resources work of the organization. Cultural Resources within The Trustees include: historic houses and structures; historic landscapes including designed gardens and parks as well as historic vernacular landscapes; archaeological sites; archaeological artifacts; object and archival collections associated with specific properties; and archival collections pertaining to the history of The Trustees.

### Development Committee

*Chair: Philip Edmundson*

*Executive Lead: Ed Wilson, Chief, Development and Strategic Partnerships*

The Development Committee participates in and advises on the major fundraising activities of the organization, including, but not limited to, major initiatives, individuals, legacies, corporations, trusts, foundations, and government funding. These are the essential revenue generating activities upon which the organization depends to support its operations, programmatic goals, mergers, acquisitions, new initiatives, and overall growth.

### Enterprise Committee

*Chair: Michael Prior*

*Executive Lead: Matt Montgomery, Chief, Marketing and Audience Development*

The Strategic Enterprises Committee's mission is to advise and support the development of initiatives that are consistent with The Trustees' broader mission and designed to generate net positive earned income, providing an important source of funding for engagement programming, property operations, and property stewardship. The Strategic Enterprises Committee works with the Chief of Marketing and Audience Development to carry out its responsibilities. The Chief of Finance and Administration, President and CEO, and others with earned-income responsibilities work with the Committee from time to time.

### Finance and Audit Committee

*Chair: David Croll*

*Executive Lead: Paul Leech, Chief, Finance and Administration*

The Board of Directors has delegated responsibility to the Finance and Audit Committee to oversee the financial condition and other financial matters of the organization. The Finance and Audit Committee will work with the Chief of Finance and Administration to carry out this responsibility. At each regular quarterly Board meeting the Committee will report to the Board on its work during the preceding quarter and make recommendations on matters requiring Board action.

### Governance Committee

*Chair: Brian Kinney*

*Executive Lead: Jocelyn Forbush, Acting President and CEO*

The Governance Committee is a committee responsible to recruit and attract individuals for The Trustees' Board of Directors, and to assess the overall effectiveness of Board committees and volunteer leadership.

### Human Capital Committee

*Chair: Phyllis Yale*

*Executive Lead: Paul Leech, Chief, Finance and Administration*

The Human Capital Committee is responsible for evaluating and approving sound compensation and personnel practices and policies for The Trustees. We aim to create an atmosphere that encourages innovation and creativity and that is consistent with the mission, values, culture, and business needs of The Trustees.

### Investment Committee

*Chair: Andrew O. Davis*

*Executive Lead: Paul Leech, Chief, Finance and Administration*

The Investment Committee reports its proceedings to the Board at its regularly scheduled meetings. The Investment Committee meets quarterly with the Chief of Finance and Administration to review the investment performance of the various investment managers of the endowment funds and planned giving investments.

## Land Conservation Committee

*Chair: Thomas French*

*Executive Lead: Jocelyn Forbush, Acting President and CEO*

The Land Conservation Committee is responsible, under policies and guidelines approved by the Board, for oversight of the land conservation work of the organization. The Committee provides general oversight of The Trustees' broad range of conservation and real estate transactions, supporting the planning and implementing of conservation strategy and the protection of important landscapes.

## Marketing and Member Engagement Committee

*Chair: Martin Lempres*

*Executive Lead: Matt Montgomery, Chief, Marketing and Audience Development*

The Marketing and Member Engagement Committee's mission is to advise and support the strategic marketing initiatives deriving from the ambitions of the 5-year Strategic Plan. The Committee works with the Chief of Marketing and Audience Development to carry out its responsibilities.

## Nominating Committee

*Chair: Linda Hammett Ory*

*Executive Lead: Ed Wilson, Chief, Development and Strategic Partnerships*

The Nominating Committee's mission is to recruit and attract individuals for The Trustees' governing bodies (Advisory Board, Corporate Trustees, and Chairman's Council), by developing new volunteer talent with diverse skills and capabilities for this role and assisting in the orderly succession of The Trustees' leadership. The Committee aspires to provide a clear path for volunteer advancement within The Trustees. The Committee is therefore responsible for overseeing the recruitment of volunteers for governance roles at The Trustees, as well as for their orientation, advancement, and evaluation. The Committee is responsible annually for the submission to the Board of a slate of nominations for the Advisory Board, Corporate Trustees, and Chairman's Council.

## Stewardship Committee

*Chair: Robert Mason*

*Executive Lead: Christine Morin, Chief, Places and Engagement*

The Stewardship Committee is responsible for oversight of property stewardship at The Trustees. The committee supports advancement of strategic stewardship goals and tactics, provides guidance on issues of property care condition, and establishes statewide policies, standards, goals, and practices that shape property stewardship and visitor services across The Trustees' reservation work.

## Strategic Opportunities Committee

*Chair: Michael Prior*

*Executive Lead: Jocelyn Forbush, Acting President and CEO*

The Strategic Opportunities Committee serves as a body of Directors who help evaluate potential strategic opportunities and serve as information points for the various involved Committees that also review potential opportunities for The Trustees. Collaborating with all committees, especially the Development Committee, Land Conservation Committee, Cultural Resources Committee, Agricultural Committee and Marketing and Member Engagement Committees, the Strategic Opportunities Committee will strive to introduce, analyze, and support compelling, pivotal partnerships, acquisitions, affiliations, mergers, and integrations that potentially further the mission of The Trustees. The Trustees' Strategic Opportunities are long-term opportunities that help us to expand our mission-based work or grow our reach and identity. Strategic Opportunities under the guidance of this Committee shall usually include interactions, originally, with another governance body or require Directors vote and approval.

## V. Supporting the Work of The Trustees

### FOUNDERS CIRCLE: ANNUAL LEADERSHIP GIVING

We ask that Governance volunteers count The Trustees among their top philanthropic priorities. Corporate Trustees are asked to participate in our Founders Circle program at the 1891 Society level. Members of the Advisory Board are asked to support at the Commonwealth Society level. Directors take a leadership role in all aspects of fundraising for the organization. Founders Circle members enjoy special events across the state, including behind-the-scenes gatherings to get a unique look at the work we do and interact with Trustees staff.

#### Founders Circle Annual Giving Societies levels:

- **1891** – members contributing \$1,000 to \$2,499
- **Charles Eliot** – members contributing \$2,500 to \$4,999
- **Commonwealth** – members contributing \$5,000 to \$9,999
- **Olmsted** – members contributing \$10,000 to \$24,999
- **President's Circle** – members contributing \$25,000 to \$49,999
- **Tudor and Chase** – members contributing \$50,000+ in operating support

### THE SEMPER VIRENS SOCIETY

Semper Virens means "always green." The Society honors those generous individuals who support The Trustees through a life income gift, such as a charitable gift annuity or charitable remainder trust. The Society also recognizes those who make a bequest or some other provision for The Trustees in their estate plan. These individuals have turned their passion into a legacy and in doing so have set an inspiring example for others. We encourage all leadership volunteers to learn more about the important role Semper Virens Society members play in perpetuating the mission of The Trustees.

### HONOR AND MEMORIAL GIFTS

Honor the special people, places, and events in your life – and give back to the places you love. Or, offer a memorial gift as a wonderful testimony to the life of a beloved person who has passed on.

### GIVE THE GIFT OF MEMBERSHIP

A Trustees membership makes a meaningful gift for birthdays, anniversaries, graduations, and more – and it makes a real difference in protecting special places across Massachusetts. Membership provides many benefits including free or reduced admission to our 123 reservations; our property guide; a year's subscription to *Special Places*; and the ability to purchase a Crane Beach Parking Permit.

We currently have more than 86,000 member households.

#### General Membership categories are:

- Individual – \$50 (Senior Individual – \$45)
- Family – \$70 (Senior Family – \$60)
- Contributing – \$125
- Supporting – \$165
- Sustaining – \$350
- Sponsor – \$600

All general memberships are fully tax-deductible.

General members are offered opportunities throughout the year to provide additional financial support, above and beyond membership dues.

### DONATE YOUR TIME

Engage with our properties on the ground level. Whether you'd like to gain new skills or share those that you have, you can find a place in our gardens, houses, or trails. Volunteer work days are of incredible value to The Trustees, often helping us complete projects that could take our property staff weeks to finish on their own. In addition to volunteer options for individuals, The Trustees works with a growing number of corporate volunteer groups, and we welcome introductions to your company contacts.

Additional details and specific volunteer opportunities can be found at [thetrustees.org/volunteer](http://thetrustees.org/volunteer).

### ENTERPRISE

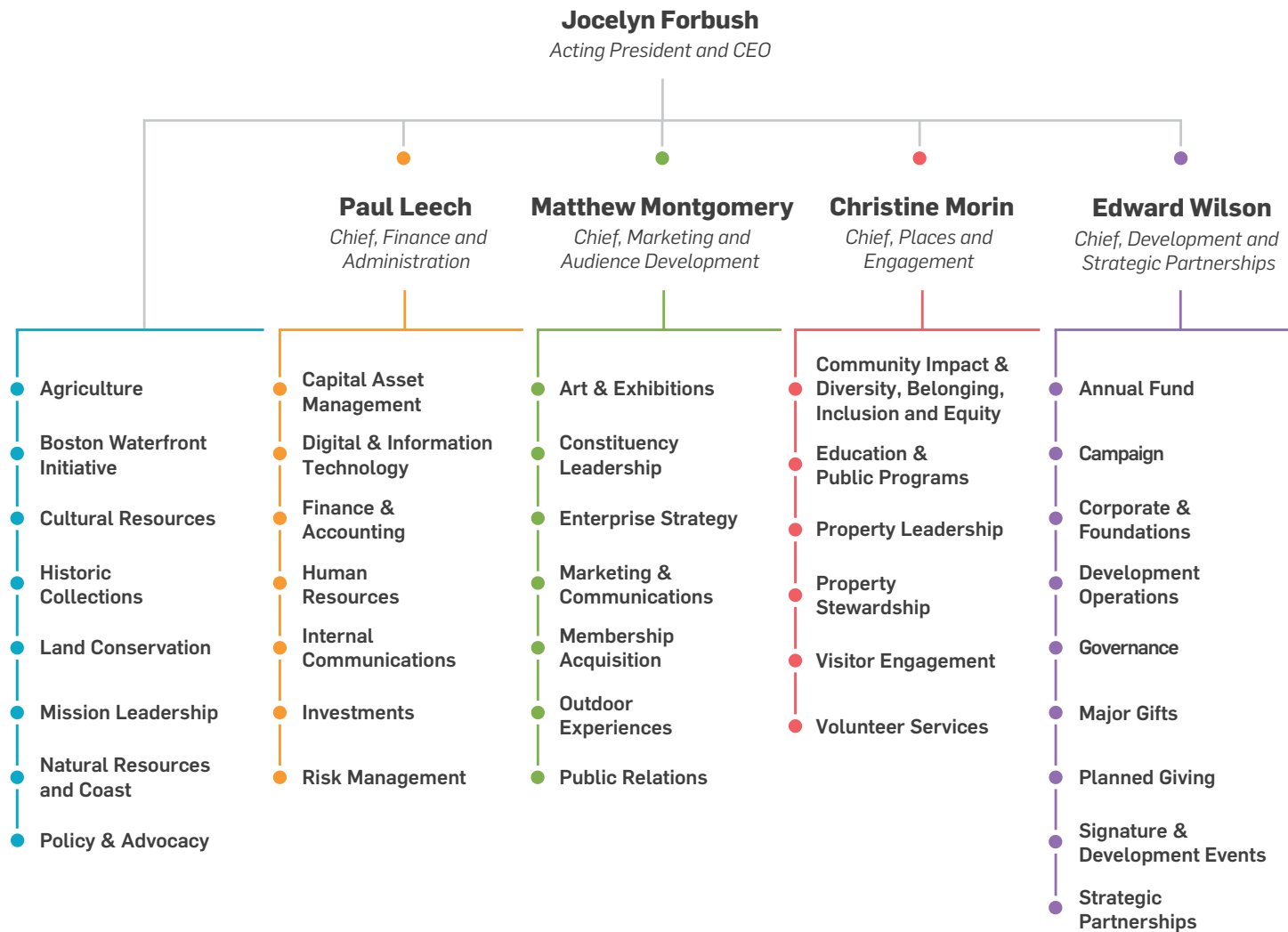
"Earned income" is yet another way The Trustees covers annual expenses. We have a range of operations that fall under this category. You can stay with us at inns on the North Shore or the Berkshires, or at seaside and lakeside campgrounds. We offer a variety of programs to connect you with food—from cooking classes to field dinners, CSAs and farm stores that all provide fresh, local, and healthy food choices. There are gift shops at our museums and several of our historic houses, which are also accessible online, along with cafes for snacks, lunches, or picnics on the property. Our reservations can provide the perfect backdrop to life's special occasions. We offer catering and event services at a number of sites throughout the state. Summer camps are designed to reconnect kids with nature and educate them about the importance of protecting it. We encourage you to support The Trustees through participation in these programs and to spread the word to others. Enterprise offerings are an important way to not only generate income but introduce The Trustees to new audiences.

For more information on any of these programs, visit [thetrustees.org](http://thetrustees.org).



**VI. OPERATIONS**

Staff Organizational Chart



**MEET THE TRUSTEES EXECUTIVE TEAM**



**JOCELYN FORBUSH**  
Acting President and CEO  
2000 – Present

Jocelyn Forbush became Acting President and CEO in November 2020. Jocelyn has served the organization for more than 20 years in a range of positions which gives her both a depth of

knowledge and an expansive view of the work.

While serving as Acting President, she has also maintained the responsibilities of the Executive Vice President role, which she had assumed in 2019: long-term strategy for key mission areas and implementation of The Trustees' strategies through oversight of the Operations & Programs Department. Under her leadership as Executive Vice President, The Trustees established its first five-year agricultural and coastal visions; a ten-year public gardens strategy; the Eliot Initiative (the organization's priority conservation targets); an expansion of The Trustees' archival and curatorial work; a unique data-driven property stewardship approach; and the launch of the One Waterfront Initiative in Boston.

Prior to serving on the executive team, as the Western Regional Director, Jocelyn pioneered the organization's work in gateway cities and underserved populations, established the nationally supported Highland Communities Initiative that led to The Trustees' affiliation with Hilltown Land Trust, and led acquisitions of iconic properties like Mount Warner and Land of Providence. In 2012, she was promoted to Vice President, Program Leadership, leading the mission-based work of The Trustees including land conservation, cultural resources, property stewardship, ecology, policy, and agriculture. She began her career with the organization as a Land Conservation specialist and moved through various departments but always with a focus on growing the organization's conservation work and its external impact.

Jocelyn is a formally trained ecologist and, prior to working with The Trustees, she worked for the Riverways Program of Mass Fisheries and Wildlife and the Quebec Labrador Foundation. Jocelyn earned her Masters of Forest Science from the Yale School of Forestry, an M.Mus. from McGill University, and a B.M. from Northwestern University.



Bartholomew's Cobble, Sheffield



**PAUL LEECH****Chief, Finance and Administration***2019 – Present*

Paul joined The Trustees in September 2019 and is responsible for leading the Finance, Information Technology, Human Resources, and Risk

Management teams as well as providing coordination and oversight with outside counsel.

Before joining The Trustees, Paul occupied leadership roles in both for- and non-profit sectors. He was Chief Financial Officer of Ansell's in the UK, one of the largest pub and restaurant operating companies, before moving to the US over 20 years ago when he became CFO for Dunkin' Brands. He was instrumental in delivering a period of significant growth and expansion for both Dunkin' Donuts and Baskin-Robbins in the US. Later, as Chief Operating Officer of the International division, he oversaw similar growth in developing new markets and partnerships with Joint Venture boards in Russia, Korea, Japan, Thailand, and Australia. A subsequent role at Dunkin' as Chief Administrative Officer allowed Paul not only to develop the nascent Corporate Social Responsibility function, but also, in partnership with franchisees, to establish a new Foundation. In this role, Paul provided leadership to the Human Resources function and was responsible for organizational culture. The impact of his leadership resulted in the adoption of a new values-based approach by the company which significantly increased organizational performance.

The experience in leading a foundation and its mission-driven emphasis was pivotal in Paul's move into the non-profit sector. At Jumpstart, where he served as Chief Operating Officer, enrollment of pre-school children increased from 3,500 to over 12,000 in three years. Additionally, Paul developed strategic alliances in several new markets and initiated significant workforce programs for Jumpstart. Paul then served as CEO of Team Impact, a national 501(c)(3) which matches children surviving chronic and life-threatening illnesses with college sports teams. Finally, Paul served as COO of Nurture, an organization which provides pre-school education to over 1,100 children in the Boston area.

A leukemia survivor, Paul has been able to provide counsel and support to patients and has been the Patient Advocate on the National Alliance for Leukemia and a national clinical trials committee. He lives with his wife, Kim, in Boston.

**MATT MONTGOMERY****Chief, Marketing and Audience Development***2013 – Present*

Matt Montgomery joined The Trustees in 2013 as the organization's first Chief Marketing Officer. Matt oversees the stakeholder engagement

department. During this time, he has created or transformed the Marketing, Membership, Enterprise, and Visitor Interpretation departments.

In the last 8 years, Matt has overseen a comprehensive rebranding campaign, the implementation of a statewide POS system, the 125th Anniversary marketing and public programming campaign, and co-authored the Excite strategy—the organizational roadmap for engaging visitors through public programming and visitor experience. Visitation at The Trustees has grown from 1.2 million annual visitors to more than 2 million. Membership has grown from 42,000 households (\$3.2 million) to 86,000 (\$7.4 million). Matt has led the communications and marketing strategy to launch several special efforts including the Art and the Landscape program, Boston Public Market Kitchen, and One Waterfront Initiative. In 2019, he led the effort to create a Digital Roadmap for the organization and in 2020, his department launched a newly designed website. In 2020, he became the executive in charge of Art and Culture, a new division created after the integration with deCordova Sculpture Park and Museum.

Previously, Matt worked as the Director of Marketing and Communications at the Isabella Stewart Gardner Museum where he oversaw the public relations and marketing initiatives for the opening of the new wing designed by Renzo Piano. He also worked as the Director of Marketing and Communications at the Museum of Art at the Rhode Island School of Design (RISD) where he opened the Rafael Moneo-designed Chace Center with three exhibitions by Dale Chihuly. Prior to that he worked at the Museum of Modern Art in New York and colleges and universities in Atlanta, GA. He has his B.A. in English from the University of Georgia and his M.A. in English and American Literature from Georgia State University.

**CHRISTINE MORIN****Chief, Places and Engagement***2020-Present*

Christine serves as Chief of Places and Engagement at The Trustees, where she oversees statewide education programs,

stewardship, community engagement and DBIE, volunteer services, visitor experience and property management for all nature, agriculture, culture, and recreation sites. Christine has extensive executive-level experience leading growth strategy, strategic partnerships, marketing and communications with 15+ years in a prominent national education non-profit.

Previously, Christine served as Chief Growth and External Affairs Officer at City Year where she focused on generating private and public resources, developing partnerships and mobilizing key stakeholders—diverse young adults, investors, partners, educators, and policymakers—to fuel increased impact with students and schools across the country. In her work leading growth strategy, Christine launched new City Year programs in 12 cities, securing multi-million dollar private sector growth capital and strategic partnerships with school districts, and managing community relations. She recently led a refresh of City Year's brand strategy, website, and messaging to reach a new generation of young adults. She also served as the Founding Executive Director of City Year Miami, leading the organization's largest new site launch. Christine joined City Year in 2005 as the Fireman Public Service Fellow where she led City Year's signature corporate partnership program, increasing revenue by over 40% and securing two new national corporate partners—PepsiCo and Pepperidge Farm.

Prior to City Year, Christine served as the founding Director of the International House of Blues Foundation-Orlando, an arts education program that promotes cultural understanding and creative expression through music and art and she founded the House of Blues Folk Art Festival, a dynamic cultural festival that featured prominent national self-taught artists.

Christine was the first woman in her family to graduate from college, earning her bachelor's degree in sociology from Florida State University, and she earned her master in public policy from the Harvard Kennedy School.

**ED WILSON****Chief, Development and Strategic Partnerships***2014 – Present*

Edward Wilson, Chief of Development and Strategic Partnerships, joined The Trustees in 2014. In this role, Ed is responsible for all

aspects of individual, foundation, and corporate fundraising, including campaigns and Founders Circle—the organization's giving societies. His team also manages governance and signature events. Prior to The Trustees, Ed worked as a Strategic Consultant to the World Monuments Fund (WMF). WMF is the largest and most respected nonprofit organization focused on international heritage with a network of offices around the world. In fiscal 2012, total support for WMF's field work was \$40.8 million, with over half coming from WMF's donors. During this period, he worked directly with the Board and the WMF leadership to develop a vision, strategic plan, and new business opportunities prior to its 50th anniversary. Ed also worked with the U.S. National Parks Service, national partners, eight state governments, local stakeholders, multiple cities, towns, and state associations to help develop a new collaborative framework for Route 66, in order to capitalize on its preservation, heritage tourism, and economic development potential.

Until 2013 Ed served as the President and CEO of Earthwatch Institute. Earthwatch is a \$20 million nonprofit organization supporting the work of more than 70 scientists in 50 countries, studying issues ranging from climate change and ecosystems services to oceans and cultural heritage. Ed is actively consulted by other NGOs on strategy, governance, private sector partnerships, and change management. He has participated on multiple research expeditions around the world and served as an Officer in the British Army, completing three tours of duty, specializing in counter terrorism. A Fellow of the Royal Geographical Society, he has served on various boards and was a founding Director of the Building Bridges Coalition, a Brookings Institution initiative to foster global service. He is a member of the Boston Committee on Foreign Relations. Ed is a graduate of King's College London and holds a BA in Geography, specializing in African Studies and Third World Development. Ed lives in Concord with his wife Imogen and two children.

## DEPARTMENTAL PROFILES

The Trustees' organizational structure is divided into five statewide functions: Operations and Programs, Finance and Administration, Marketing and Audience Development, Places and Engagement, and Development and Strategic Partnerships. The departments are led by the President and CEO, along with supporting Executives who make up the Executive Team.

### OPERATIONS AND PROGRAMS

#### JOCELYN FORBUSH ACTING PRESIDENT AND CEO

#### What We Do

The Operations and Programs Department (O&P) establishes and leads the implementation of vision and strategy for the organization's key resource-based mission areas, articulating the path to achieving strategic and mission-related goals and then collaborating with other departments and regions on implementation. The team is made up of highly-skilled technical specialists who lead the organization through the individual program strategies as well as the design and application of the best practices, standards, and internal policies that define our excellence and guide our day-to-day operations.

#### How We Do It

The Operations and Programs Department is made up of the following program areas: Land Conservation, Cultural Resources, Natural Resources and Coast, Agriculture, and Public Policy. It is also the organization's incubator of the Boston Waterfront Initiative.

#### LAND CONSERVATION

Our conservation team is responsible for the protection of landscapes and landmarks that connect people to place and protect the unique and remarkable scenic, historic, and ecological resources of Massachusetts. Using multiple tools and techniques, conservation specialists acquire new reservations, support our existing reservations through protection of adjacent properties, and, when opportunities arise, work with partners to pursue large-scale statewide protection priorities. Our staff also monitors and enforces the almost 400 conservation restrictions that we have protected, on approximately 27,000 acres of private lands.

Through our land conservation department, we manage and staff a wholly owned, nonprofit subsidiary, the Massachusetts Land Conservation Trust, Inc. (MLCT), to carry out complex transactions involving properties or portions thereof that will not be held by The Trustees as permanent reservations. In addition, this team also supports our affiliate, the Hilltown Land Trust, in its land protection work.

#### CULTURAL RESOURCES

As the only organization in Massachusetts that advances protection with an eye toward preservation and conservation, we are holistic in our approach to saving landscapes.

Today, we care for reservations that span the breadth of Massachusetts' history and people. Caring for these unique resources and interpreting the stories of our special places is the work of our Cultural Resources team. Led by our Cultural Resources Program Director, this team oversees the specialties of horticulture, designed and historic landscapes, as well as our statewide Archives and Research Center (ARC).

#### HISTORIC PROPERTIES & COLLECTIONS

Encompassing twenty historical properties and a collection of 50,000+ objects, we work as caretakers, educators, and storytellers. With our Cultural Resources colleagues, our team connects objects, people, and properties in creative ways, inspiring visitors to explore and learn. Our work includes stewarding the collection, which we have an ethical and legal responsibility to care for in perpetuity. As a mission-based program, we also bring scholarly leadership in the advancement of our intellectual understanding of these structures and objects. This takes many forms, but includes cataloguing and researching the collection, overseeing conservation work and assessments, and advocating for the collection internally and to the public through site-based presentations, specialty tours, professional conferences, publications, and partnerships with other organizations. Our Director of Collections leads a team of curators, all with Decorative Arts and Collections Management expertise, across the state.

#### NATURAL RESOURCES AND COAST

Our properties' natural resources are managed in a manner that nurtures habitats and landscapes that can withstand or adapt to stress, such as invasive species, overuse, and climate change. Our ecology and coast teams work closely with regional property management staff to implement the best management practices and address priority ecological needs and they work collaboratively with our engagement staff to connect many more people to our natural resources. Our Director of Coast and Natural Resources leads this team and is also providing leadership and implementation to drive our emerging focus on coast.

#### AGRICULTURE

Agricultural lands are of central importance to The Trustees; the majority of our iconic reservations preserve an important agricultural legacy. Our Agriculture strategy is currently focused on nurturing a growing network of educational, community farms throughout the Commonwealth and by doing so, is an important contributor to the sustainable agricultural network in Massachusetts.

We have a strong team of farmers and farm experts on staff who are building our leadership role in this field through the management of five farm properties that support the vegetable and livestock production that feed retail, CSA, a Mobile Market in Boston, and our food donation program. The Agriculture team also works with regional and ecology peers to manage our portfolio of grasslands and fields, managing some as priority agricultural and natural resource assets, and supporting a leasing program to local farmers.

#### PUBLIC POLICY

As a nonprofit leader in Massachusetts, The Trustees has the opportunity to be an active and influential member of the statewide community working to improve the quality of life in Massachusetts. Our Policy effort is led by our Director of Policy and draws on the time and skills of each of the Program Directors as well as other key staff across the organization. Through networking, collaborations, and advocacy, we aim to raise our profile in state and federal policy arenas and track and influence the state and federal issues that impact policy and funding for our mission-based program areas.

#### ONE WATERFRONT

The Boston Waterfront Initiative, externally known as *One Waterfront*, is a focal point of our strategic plan as it advances a bold vision for open space on the Boston Waterfront, responding to issues of coastal- and climate-change related threats to our capital city, as well as rapid, unplanned redevelopment of the Boston waterfront. This initiative is focused on creating iconic public space that serves as a world-class destination and increases our stature as a city on the coast; supports diverse community need and accessibility; brings value to Boston's climate resiliency goals; and that establishes new and sustainable park management models in the city. The Initiative is staffed by a Director and Project Manager who together work with a team of consultants, staff, and city-wide partners to achieve this vision for a stronger public realm on the waterfront.



## FINANCE AND ADMINISTRATION

### PAUL LEECH CHIEF, FINANCE AND ADMINISTRATION

#### What We Do

We oversee The Trustees' finances and accounting, human resources, and digital and information technologies.

#### How We Do It

##### FINANCE AND ACCOUNTING

We provide financial reporting and analysis that informs operational management and resource allocation decisions as guided by the organization's strategic objectives. We also administer the endowment portfolio and the risk management program, and ensure compliance with all regulatory requirements.

##### HUMAN RESOURCES

We foster a work environment that encourages innovation, creativity, and work-life balance that strives to make The Trustees an employer of choice. We administer a program of employment policies and competitive compensation and benefits practices to ensure all employees are treated fairly and consistently. We provide professional development training, monitor staff satisfaction with their work environment, and support the hiring and retaining of topnotch employees. We also ensure compliance with all labor laws, regulations, and other requirements.

##### INFORMATION TECHNOLOGY

We continually develop, improve, and maintain a reliable and secure technology platform, as well as applications and office systems to support the organization's operational and strategic initiatives. Additionally, we utilize technology to: optimize staff efficiency and effectiveness, and enhance communications and information sharing.

## How You Can Help

The following committees aid in our work and we welcome your interest in being considered for service on them:

- The Finance and Audit Committee meets at least four times per year to provide oversight of operating and capital budgeting, financial reporting, the annual audit, compensation and benefits, and risk management.
- The Investment Committee meets at least quarterly and oversees the organization's endowment and other investments. They recommend the investment and spending policy, monitor investment performance, and review investment managers.
- The Human Capital Committee is responsible for the organization's overall compensation philosophy and approach and for evaluating and approving sound personnel practices and policies of The Trustees. The Committee reviews the results of the annual employee performance appraisal and compensation adjustment process and periodically reviews human resources policies and programs to ensure they are fair, transparent, and effectively communicated. The committee meets three-to-four times per year with the support of a compensation consultant as appropriate.

## MARKETING AND AUDIENCE DEVELOPMENT

### MATT MONTGOMERY CHIEF, MARKETING AND AUDIENCE DEVELOPMENT

#### What We Do

The Marketing and Audience Development division was created in 2012 to expand The Trustees' brand visibility, audience engagement, and its use of enterprise to enhance visitor experience and to generate revenue sources to support our mission. The department encompasses Marketing and Communications, Membership, Art and Exhibitions, Outdoor Experiences, Enterprise, and Visitor Interpretation. In 2020, the department expanded to include Art and Exhibitions in recognition of the power of art to influence and impact audience engagement and development. The new focus area on Outdoor Experience was created in 2020 to advance audience development engagement specifically at our outdoor recreation sites.

#### How We Do It

The department works across the Commonwealth and with departments throughout the organization with a focus on building new audiences and sparking engagement with our places and our mission. The Division is organized around the functional areas of Marketing and Communications, Membership, Outdoor Experience, Visitor Interpretation, Art and Exhibitions, and Enterprise. Each area is managed by a department head with deep content expertise and knowledge.

##### MARKETING AND COMMUNICATIONS

The Marketing and Communications Department originates conversation and interaction with the full range of major constituencies by proactively communicating with current and prospective audiences in a wide variety of ways. Employing both traditional and non-traditional mass-marketing tools and outlets, the department maintains consistent brand standards in design and editorial voice. The first point of contact for many visitors, our website includes a comprehensive look at the organization's areas of work and access to information on all Trustees properties. This channel is complemented and enhanced by other interactive tools including email marketing campaigns and monthly e-newsletters, as well as actively programmed social media outlets. Trustees print

and publication program informs, educates, and enlightens our core audiences with professional articles highlighting the organization's work. The centerpiece of the publication program is the quarterly member magazine, *Special Places*, along with our Annual Report. We develop, design, and produce a wide variety of printed marketing materials, including our property guide, newsletters, brochures, invitations, membership solicitations, interpretative signage, and maps. Through free editorial press, we seek to enhance The Trustees' reputation and attract new audiences through third-party endorsement and coverage.

##### MEMBERSHIP

The Membership Department oversees the recruitment and retention of Trustees members statewide. Working in tandem with the Development Department, the Membership Department exploits best practices in direct marketing techniques in order to constantly build our core audience and donor base. The acquisition process includes a rigorous approach to member service and fulfillment to ensure a strong renewal and retention rate. The department focuses on customer service and member experience as a tool for retention and lifelong loyalty.

##### ART AND EXHIBITIONS

The Art and Exhibitions department was formed in July 2019 as an outcome of the integration with deCordova Sculpture Park and Museum and the culmination of the successful Art and the Landscape program. The department unites all Trustees curatorial functions in one division and is responsible for elevating the public awareness of The Trustees as a cultural organization within the context of its longstanding and well-established reputation for land preservation and conservation. The department seeks to enhance the visitor experience of Trustees reservations using exhibitions, installations, collections displays, performances, and other curated programs to increase visitor understanding, appreciation, and enjoyment of specific properties.

##### OUTDOOR EXPERIENCES

Recognizing our mandate to get more people outdoors, The Trustees created an Outdoor Experience focus with a new Director in 2020. The department is focused on leveraging the powerful platform of The Trustees' outdoor properties to invite visitors and families to play and learn outdoors. The Director is also developing new ways to invite diverse audiences to participate in outdoor recreation through partnerships.



## ENTERPRISE

Enterprise provides needed sources of revenue to support our mission. Specifically, Enterprise offers food service, retail enterprise, and rentals to enhance and extend the visitor experience and provides the opportunity to further advance the brand of the organization. This work falls into two areas of focus—retail enterprise including food service, agricultural products, and gift shops; and enterprise partnerships including private events, film shoots, and other contract-based work.

## VISITOR INTERPRETATION

Intrinsic in the care of our places are all of the stories found within. Visitor Interpretation creates strategies and tools for telling and sharing these stories. The purpose is to be firsthand, participatory, and informal. These stories are shared with our visitors through our Tour Trustees App, in-person tours or programs, and on-site interpretive signage or interactive elements. We encourage visitor participation to enhance the learning. Many of our interpretive approaches are meant to be self-guided.

## PLACES AND ENGAGEMENT

### CHRISTINE MORIN CHIEF, PLACES AND ENGAGEMENT

## What We Do

The Places and Engagement team supports the mission of the organization through the effective management of a statewide portfolio of properties and recreational trails, developing strategies to advance our impact through stewardship, volunteer management, community relations, education and Diversity, Belonging, Inclusion, and Equity (DBIE). The team includes central team strategists and operations leaders who build systems for collaboration and learning, engage external stakeholders (visitors, members, community groups, local government, donors), manage the care of our resources, create welcoming and inclusive environments on our properties and drive innovative implementation that accelerates our mission and impact.

## How We Do It

The Places and Engagement Team is comprised of the following areas: Property Leadership, Stewardship, Education, Visitor Engagement, Community Relations, DBIE, and Volunteer Services.

### PROPERTY LEADERSHIP

The Property Leadership team oversees statewide properties in theme-based portfolios (Nature/Agriculture and Culture) to drive a triple bottom line across all properties. The team leverages operational leadership, data-informed decision-making, continuous improvement and innovation to achieve excellence in visitor experience, resource stewardship, financial sustainability, community relations and governance. This team is focused on ensuring a stellar visitor experience, which includes expanding visitor amenities, providing a sense of welcome and inclusion, ensuring interpretation and programming is top-notch, as well as developing impactful relationships with community stakeholders and improving the financial position of properties.

### STEWARDSHIP

Stewardship at The Trustees uses a forward looking, data driven approach to deliver consistent, high quality resource care across our 123 reservations (landscape, buildings, and collections). Maintaining this standard of care is not only fundamental to our mission, but it also allows us to grow and engage more people in our work. The Central Stewardship team designs and supports implementation of the standards,

strategies and policies that shape our resource protection. This team includes functional areas that support our success, including structural resources, property planning, geographic information systems, trails and project management. In addition, this central team directly manages 43 recreational trails properties across the state.

### EDUCATION AND PUBLIC PROGRAMS

Our Education program creates innovative ways to engage all ages with environmental issues, historic landscapes, contemporary art, and local agriculture. The program connects new and returning audiences through immersive experiences that deepen their knowledge and connection to our mission and properties. Expanding partnerships with schools in key communities broaden our reach among non-traditional audiences. Currently, the formal education program includes a Coastal Education initiative on Martha's Vineyard and at Crane Beach; Farm-based curriculum at Appleton Farms and beyond; Arts and Culture educational framework at deCordova Sculpture Park and Museum and Fruitlands Museum; as well as a six-week internship program with the Norfolk Agricultural School. Public programming, on the less formal side, designs unique opportunities for families as well as adults to experience what makes our properties so special—from picnic concerts to kayaking excursions, cooking classes, gardening workshops and much more. Education is infused into all our work as we engage diverse audiences across Massachusetts.

### VISITOR ENGAGEMENT

The Trustees welcomes and engages millions of visitors each year. We work to inspire and welcome more people—to visit, learn, join, and contribute to The Trustees and most importantly become lifelong lovers of conservation and preservation. Our visitor engagement efforts instill an understanding and appreciation of our properties; provide a broad range of opportunities that attract and diversify participation in programs; and create compelling volunteer initiatives. Our goal is to raise positive awareness of our properties, deepen visitors' connection to the organization's mission, and contribute to the quality of life in Massachusetts.

### COMMUNITY IMPACT AND DBIE

The Community Impact team is focused on building a vibrant, diverse and committed constituency through rewarding and dynamic community engagement opportunities and supporting the long-term success of our properties and build our audience of members, visitors, volunteers, and potential donors through improved community and town relationships.

This team partners with Portfolio Directors to improve community relations across properties with both proactive and reactive community engagement strategies, engaging key stakeholders including elected officials, neighbors, volunteers, members, donors, and community groups.

The Community Impact team is also leading the work to build a roadmap for The Trustees' renewed commitment to DBIE, grounded in the vision of creating inclusive spaces of belonging for Trustees staff, members, volunteers and communities across our organization and 123 properties. The multi-year DBIE roadmap will outline a staged set of investments we will make over the next three-plus years in order to achieve this vision. Key pillars of investment and capacity will include a focus on people and culture, places and programs, audiences and experience and suppliers and vendors.

### **VOLUNTEER SERVICES**

Volunteers are at the heart of The Trustees—communities of individuals, organizations, and companies committed to preserving and protecting our properties and welcoming people from all backgrounds to enjoy our special places. Volunteerism has been a cornerstone of The Trustees' 130-year history in conserving land for people and continues to play a role in shaping its future. The Volunteer Services team oversees the implementation of a new statewide volunteer recruitment and engagement strategy. This new framework includes streamlining and refining the department, developing new tools and trainings for staff and volunteers, launching an enterprise-wide volunteer management system and overseeing new Key Performance Indicators and metrics to measure volunteer recruitment, engagement and experience. In addition, Volunteer Services partners with Coastal and Natural Resources departments to greatly expand the Coastal Volunteer program, which will include an increase in number of volunteers, volunteer hours as well as expanded partnerships and a focus on diversifying the volunteer base.

## **DEVELOPMENT AND STRATEGIC PARTNERSHIPS**

### **EDWARD WILSON CHIEF, DEVELOPMENT AND STRATEGIC PARTNERSHIPS**

## What We Do

The Development Department encompasses Annual Fund; Campaigns and Special Projects; Strategic Partnerships; Legacy Giving and Governance. Development Services provides all the administration and data support for donors.

The department also includes a Managing Director of Strategic Partnerships and a Director of Signature Events. Each team is managed by a managing director reporting to the Chief of Development and Strategic Partnerships.

## How We Do It

The Development Department is divided by functions: Individual Giving—which covers annual giving, major gifts, and planned giving; Leadership Gifts—which includes campaigns and governance; Strategic Partnerships—which covers corporate, foundation, and public funding; Development Support Services—which provides all the administration and data support for donors and members.

### **ANNUAL FUND: FOUNDERS CIRCLE**

The Annual Giving team is responsible for raising unrestricted operating support—a critical piece of our organization's budget. We recognize and thank our annual operating support donors through our **Founders Circle** program which includes six giving societies: The **1891 Society** (\$1,000–\$2,499), The **Charles Eliot Society** (\$2,500–\$4,999), The **Commonwealth Society** (\$5,000–\$9,999), The **Olmsted Society** (\$10,000–\$24,999), The **President's Circle** (\$25,000 –\$49,999) and the **Tudor & Chase Society** (\$50,000 and more). **Founders Circle** members are invited to exclusive events throughout the year and enjoy special access to properties and Trustees subject matter experts. In addition, we manage **The Great Point Circle** for our Nantucket donors, as well as a Berkshire Fund and a Martha's Vineyard Fund.

### **MAJOR GIFTS: CAMPAIGNS AND SPECIAL PROJECTS**

Our Major Gift team is dedicated to special project fundraising, solicitation, and stewardship. These are restricted gifts that provide opportunities for The Trustees to embark on special projects such as acquiring a property, a major renovation, or a significant programming initiative. Special campaigns—with a particular focus as set forth by the Board of Directors—are also led by the Major Gift team. Special fundraising campaigns are instituted to raise significant resources for targeted projects included in the strategic plan. In many cases, Board volunteers assist with this effort.

### **STRATEGIC PARTNERSHIPS**

This team builds relationships in order to identify, apply for, and secure funding to support restricted opportunities from Corporate, Foundation, and Public funders. These may be budget relieving or fulfill a specific goal or campaign. We often partner with Membership and Volunteer Engagement to broaden the depth of the relationships with our corporate and foundation partners. We currently run over 20 corporate employee volunteer teams each year.

### **PLANNED GIVING**

Since the first recorded bequest in 1902, support via wills and life income gifts has built and strengthened The Trustees' mission. Bequests are the simplest and most common way individuals can plan for the future. Life income gifts, such as a charitable gift annuity or charitable remainder trust, have the ability to transform The Trustees' philanthropy program. The Semper Virens Society recognizes those who have made a planned gift to The Trustees and meets at various sites across the state twice a year.

### **GOVERNANCE**

Along with the President's Office, Development supports the governance function of The Trustees. We oversee annual identification, recruitment, and voting of new members; organize Governance Orientation; partner on Board Committee placement; serve as primary contact for key volunteer leaders; manage the Chairman's Council and Advisory Board; and work with colleagues across the organization to plan the Annual Meeting and Dinner.



## DEVELOPMENT SERVICES

Development Services supports all areas of the Development and Membership teams by processing gifts; writing, tracking, and mailing all acknowledgment letters and fulfillment packages; tracking revenue and reporting with Finance; fulfilling database list requests; assisting with campaign planning; managing metrics; researching prospects and preparing for donor visits; and reporting and data management.

## SIGNATURE EVENTS

Signature Events works closely with Development and Membership to create interesting and new high visibility events for The Trustees. These events strive to introduce The Trustees to a new audience, engage our existing audience, and ultimately create a new source of revenue for The Trustees. This team also helps to plan donor stewardship and cultivation events, as well as governance meetings.

## How You Can Help

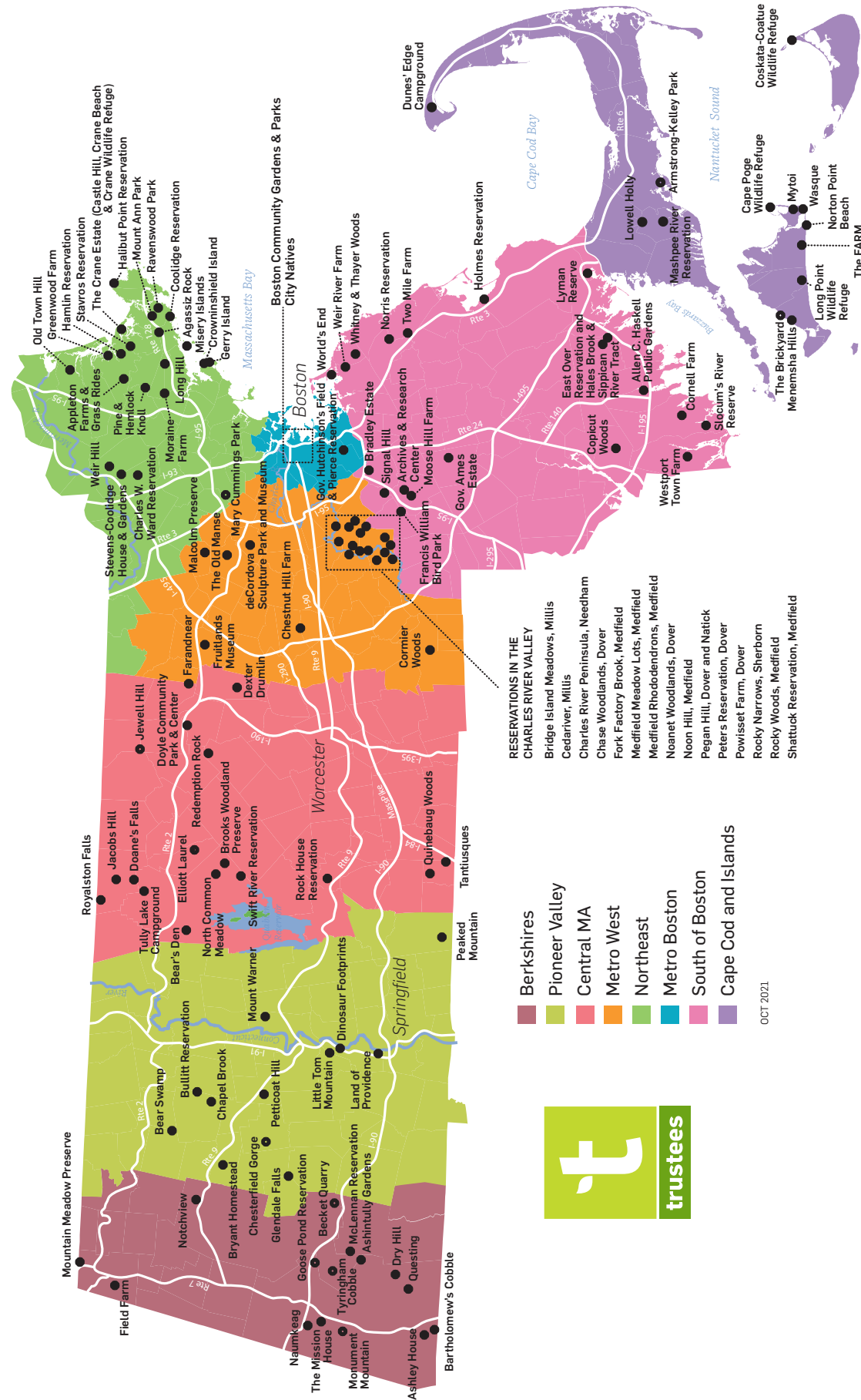
- Make a gift to the Annual Fund.
- Consider including The Trustees in your estate plans.
- Participate in events planned by the Development Team.
- Introduce members of your network to The Trustees.
- Make a gift to a special project/campaign of interest.
- Introduce us to the right contact in your company to discuss how we can help the company achieve its own corporate social responsibility and business goals.
- Encourage friends to visit Trustees properties. There is no better way to show people what we do and how well we do it than by having them see our efforts up-close and in person



Coskata-Coatue Wildlife Refuge, Nantucket



# The Trustees – Statewide Map



## Statewide Offices

LOCATION	ADDRESS
<b>Boston</b>	200 High Street, 4th Floor ▪ Boston, MA 02110 617.542.7696
<b>Doyle Community Park and Center</b>	464 Abbott Avenue ▪ Leominster, MA 01453 978.840.4446 ▪ 978.537.5835 (F)
<b>West Region Office</b>	100 Main Street, Suite 1 ▪ Florence, MA 01062 413.200.7262
<b>Other Offices</b>	
<b>Berkshires</b>	The Mission House 1 Sargent Street ▪ PO Box 792 Stockbridge, MA 01262 413.298.3239 ▪ 413.298.5239 (F)
<b>Castle Hill</b>	290 Argilla Road ▪ Ipswich, MA 01938 978.356.4351 ▪ 978.356.2143 (F)
<b>The Islands</b>	PO Box 2106 ▪ Vineyard Haven, MA 02568 508.693.7662 ▪ 508.693.7717 (F)
<b>Westport</b>	830 Drift Road ▪ Westport, MA 02790 508.636.4693 ▪ 508.636.0587 (F)

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