



# PECONIC LAND TRUST NEWSLETTER

10th Anniversary Issue

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## A New Trust Project in Southold



*Photo by Pingree W. Louchheim, 1994*

Since it was founded ten years ago, Peconic Land Trust has worked with members of the North Fork community on a number of conservation projects. The first involved the acquisition and creation of the Southold Town Green (corner of Youngs Avenue and Main Road). Through the generosity of the late George Wells, who donated to the Trust the funds needed to purchase the lot, and the willingness of owner/developer Herbert Mandel to sell the property through a bargain sale, this site was saved from commercial development and is now a community landmark.

Recently, the Trust has been working on another project in Southold that has ties with the late George Wells and Herbert Mandel, as well as with the new owners of the Howell Farm, Paula and Michael Croteau. The Howell Farm, located on South Harbor Road, was owned by Lillian Howell, an aunt of George Wells (please see "Historic Lore").

More than a year ago, the Croteaus discovered that the scenic views they and their South Harbor Road neighbors enjoyed would be compromised by the development of the Stepnoski Farm. The developer of the site was Herbert Mandel. In April 1993, Mr. Mandel appeared before the Southold Town Board to request a zoning change that would allow increased density on the site, but a petition against this change, signed by members of the community, was instrumental in the Board's denial of the application. Although Mr. Mandel was unable to proceed with construction, once again he was in a position to enable another conservation project to begin. He agreed to transfer his contract with the Stepnoskis to the Croteaus who formed the Bayview-South Harbor Limited Partnership for the specific

*continued on next page*



## Trust Project (continued from page one)

purpose of acquiring and protecting the farm.

"Initially, we were uncertain that we would have any support for our objection to the development of the Stepnoski Farm," remembers Michael Croteau. "The location was key. The site is unique because it has exposure to the public on two sides, and we felt it should be protected. Fortunately, the community sentiment was very strong and we soon had hundreds of allies." The new plan initially sets off the farmhouse and barns, on five acres, and includes a conservation strategy for the remaining acreage, with its use limited so that the rural integrity of the farm will be preserved. The Croteaus are seriously considering using the acreage to develop a community farm similar to the Trusts' Quail Hill Farm

in Amagansett.

Dick Ward, Chair of the Southold Town Planning Board, states, "We are pleased that the new owners of the Stepnoski Farm, working with the Peconic Land Trust, are headed in this direction, and we are looking forward to working with them when they are ready to present their plan."

This project is a gratifying example of a private conservation effort that has the potential to take seventeen acres full circle; from high density to preserved farmland, while still allowing the Stepnoskis to net the same amount on the sale of the property. A project such as this also demonstrates the complexity of such efforts and the involvement of many participants, from landowner to developer,

from community members to local government and, of course, the Peconic Land Trust. The Trust's efforts are often augmented by numerous professionals, in this case, surveyors Young & Young and consultant Herb Davids.

Our work on this conservation project has just begun. The implementation of the plan will require surveys, test wells, an appraisal, and other costs. Peconic Land Trust has set up a special fund to receive tax-deductible donations to underwrite these expenses. If you are interested in helping to preserve the Stepnoski Farm, please send your tax-deductible contribution to Peconic Land Trust at P.O. Box 2088, Southampton, NY 11969 and write "Bayview-South Harbor" on your check.

## Southold Town Green



*Photo: Ralph Pugliese, Jr.*

Located at the corner of Main Road and Youngs Avenue in Southold, the Southold Town Green exemplifies community involvement in open space preservation. George Wells, whose ancestor was the original owner of the Southold Hotel, had a dream for the property which was formerly the site of the Hartranft residence that dated back to the eighteenth century. He donated \$200,000 in memory of his aunt, Lillian Howell, to the Peconic Land Trust toward the purchase of the vacant corner lot from Herbert Mandel. Mr. Mandel's willingness to accept an offer that was substantially lower than the fair market value enabled the Trust to assume ownership at the end of 1986. The Southold Town Green Committee, comprised of Edward Boyd, Frank Cichanowicz, Jean Cochran, Alice Eckert, Michael Hall, Richard Hall, John Halsey, Frank Murphy, Sarah Sands, Greg Scholand, Paul Stoutenburgh, Raymond Terry, Jean Tiedke, Vincent Tirelli, Joseph Townsend, Jr., Richard Ward and Jane Williams, was established to coordinate planning, fund-raising, and improvements to the site. Eighteen months later, the Green, with its new turn-of-the-century gazebo, courtesy of the Southold Kiwanis Club, benches, and brick walkway, was dedicated on May 29, 1988.



# Historic Lore

by Paul Stoutenburgh

It's interesting to see how sometimes things fall into place for the good of all. Residents of the North Fork still remember the name of "Aunt Lill," a prominent figure in Southold. She was deeply interested in the local history and lived on one of the "great old farms" on South Harbor Road. Her nephew, George Wells, survived her and in keeping with her wishes, tried every way possible to turn the Howell Farm into a living farm museum.

It was during this time, 15 - 20 years ago, that George Wells looked in vain to give the farm to an appropriate organization or governmental body that would create a vibrant living farm for all to enjoy. No one would take his offer. By the mid-1980s, George decided to use the site to support Hallockville in Riverhead Town, as his own dream for the Howell Farm seemed unattainable. With input from the Peconic Land Trust, George decided to sell the development rights on 20 acres of the Howell Farm to Southold Town's Farmland Preservation Program, the proceeds of which he donated to Hallockville. Later, George donated the restricted land to Hallockville by will. Finally, he put the farmhouse and buildings on the market in hopes of finding a buyer with preservation and

historic interests similar to his own.

Deals came and went and for a long time the old farmhouse and outbuildings stood idle, until Michael and Paula Croteau came into the picture. They have since refurbished the farmhouse and, with the help of Peconic Land Trust, the farm's future looks promising. The Croteaus have also purchased the old Stepnoski farm across the way to assure that the area will retain its rural character. We are, indeed, fortunate to have people like the Croteaus as stewards of this old and historic farm.

In 1971, I worked with George Wells to preserve the Howell family's marsh by gifting it to The Nature Conservancy. It was originally purchased one hundred years before, back in 1871, so that the farm would have a salt marsh to gather the hay for the farm. The short salt hay was used for bedding and fodder and for insulating old buildings in those days. It was also used for packing purposes when products were sent to market. Haying was common practice in those early days and each farm had its tract of marsh.

The Howell marsh is the last remaining natural marsh left on Goose Creek in the Town of Southold, as most have been filled by dredge spoil or the encroachment of houses that surround the area. Because of its proximity to Southold

High School, the marsh was used by the science classes for study and inventory assignments. They found all three species of fiddler crabs there, along with ribbed mussels and blue claw crabs and various marine life that clings to its edges. The main body of the meadow is made up of salt hay, *spartina patens*. Its edges are inundated by the tides twice a day and are composed of the tall thatch grass, *spartina alterniflora*. This tall grass, by the way, was used for thatching roofs of the early settlers--another reason meadows were so important.

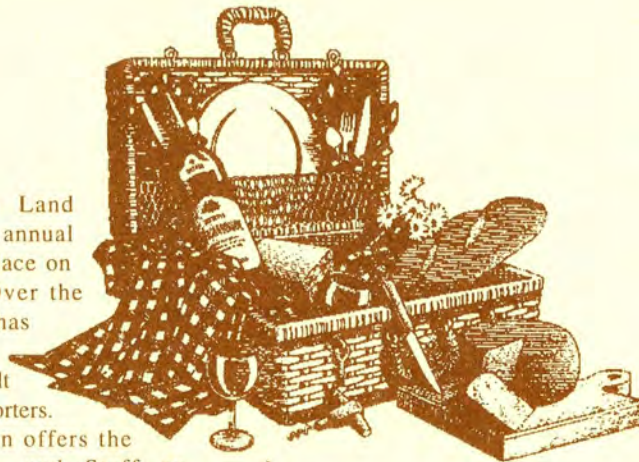
Today, salt marshes are valued for an entirely different reason, mainly for their nutrient capacity. The nutrients which are passed out of the marsh into the creek are utilized by the microscopic plankton in our waters which in turn are taken up by tiny fish and shellfish which eventually are eaten by the larger and larger fish until we, the top predator, consume them as seafood.

There is a fascinating link that has expanded from the early hopes of Aunt Lill to the dedication of her nephew George Wells, to the Peconic Land Trust, and now to the commitment of the new owners, Paula and Michael Croteau. How fortunate the community is to have all these pieces finally falling into place for the betterment of all.

## SAVE THE DATES!

June 12 & August 12

The Peconic Land Trust's ninth annual Peconinic will take place on Sunday, June 12. Over the years, the Peconinic has been the Trust's way of expressing a heartfelt "thank you" to its supporters. This popular tradition offers the Board of Directors and Staff an opportunity to celebrate with the many people who have contributed to the success of the Trust since it was founded a decade ago. Their support has enabled the Trust to protect 1,500 acres of scenic woodlands, precious wetlands and productive farmland. This year—during the Trust's 10th Anniversary Year—the Peconinic will be held on the property of Walter



Channing, a 103-acre site bordering on Scuttlehole Road in Bridgehampton. Mr. Channing recently gifted a conservation easement on 17 acres of his land to the Trust.

Last summer's Clambake was so successful, that we have tentatively scheduled Friday, August 12 for this year's event. Details to come!

## Volunteers Needed!

Volunteers are needed to assist the Peconic Land Trust staff with a variety of projects. If you have time available, your help would be greatly appreciated. For example, we are looking for...

- Qualified people to conduct plant and wildlife inventories at our preserves and conservation easement sites.
- Help in removing debris at Trust sites following storms.
- Assistance in monitoring Trust properties.
- Help with general office work and special events.

If you are interested, please call Nancy Marksbury at 283-3195 for more information.



## President's Column: *The Fundamentals of Land Conservation*

For the past 20 years, there has been tremendous development pressure on Long Island's unique open space and productive farmland. Increased property values and the specter of inheritance taxes have played a significant role in forcing the conversion of open space to other uses. Many efforts, both public and private, have been undertaken to preserve our rural character. Having been involved in such efforts for the past 10 years, I believe that there are a number of fundamentals that should guide our conservation efforts in the future.

### **1. Understand The Land To Be Protected**

Land is artificially divided. Property lines rarely conform to significant natural features, much less habitats or scenic vistas. This being the case, any parcel of land may include three types of landscapes: a) those areas that should be preserved at all costs because they include prime agricultural soils, significant natural features, or scenic vistas, b) those areas that buffer significant natural features that, if affordable, should be preserved and c) those areas that are suitable for development. While it would be nice to preserve everything, we should focus our conservation efforts on the first two types of landscapes within any given parcel of land.

### **2. Understand The Goals And Circumstances Of The Landowner**

In order to preserve land, it is essential to understand the goals, needs, and circumstances of a landowner. Only then can one assess and identify the full range of conservation options available. For example, if a landowner desires to pass land on to the next generation and has strong conservation interests, it may be possible to preserve the land at **no public cost** through the use of a conservation

easement to a private conservation organization. If a landowner is strictly interested in realizing the equity within the land, a limited development approach may preserve the most significant portion of a given parcel while providing the landowner with a reasonable financial return.

### **3. Recognize That The Public Sector Has Limitations**

Too often, those committed to land preservation turn to government as the ultimate method for the acquisition and management of significant open space. This perspective has often manifested itself in an "all or nothing" mentality with very costly consequences. Today, the public sector does not have the funds to acquire and adequately manage protected land. Even if it did, public acquisition should be viewed as a last resort after other methods, especially those of private conservation organizations, have been attempted. If one truly understands the land and the landowner, cost-effective and pragmatic alternatives to public acquisition can be found that maintain and, in some cases, enhance the property tax base as well as share the responsibility of land management with private landowners.

### **4. Devote The Resources Necessary To Actively Manage Protected Land**

During the process of land acquisition, too little attention is focused on the need for substantial financial resources to effectively manage protected land. This is easily understood when one recognizes the current crisis with regard to the management and upkeep of State and County parks. Effective land management includes the following

elements: First of all, the basic maintenance of land must be addressed. This includes regular monitoring of the land, posting, clean-up, etc. Second, the restoration and enhancement of natural features such as agricultural soils, wetlands, and habitats should be considered. Third, the extent and nature of public access must be dealt with. This includes the construction and maintenance of improvements such as trails and other facilities. If long-term management responsibilities are not adequately addressed, it is irresponsible to make public or private acquisitions.

The conservation movement on Long Island has made great strides over the past decade. However, we still have a lot to learn. If we are to succeed in preserving the character of Eastern Long Island, we must realize the complexity and consequences of our work. We must be pragmatic and creative. We must be tolerant and respectful of property rights. We must appreciate that the management of protected land is as important, if not more so, than its acquisition. Finally, we must recognize that public acquisition is only one of many methods to preserve significant open space. Private conservation methods, including conservation easements and limited development, have essential roles to play.

*John v. H. Halsey*  
*President, Peconic Land Trust*



# Land Preservation for Southold Town

by Tom Wickham

There is a strong sense of preservation among most Southolders. Most of us believe that farmland and open space, historical districts and buildings, even whole islands, should be preserved if ways can be found to do so. Therefore, it is incumbent upon us to outline a realistic approach to preserving what most people would regard as the essence of Southold Town — not all of it, not at any cost, and not all at once.

## Preserve What?

There is broad agreement that operating farms should be preserved insofar as feasible, and that wetlands should be protected. Certain "sacred" places should be preserved if at all possible, such as Fort Corchaug, a number of scenic corridors in the Town, and many waterfront views. In addition, the Town is known for its separate village centers; their charm should be preserved wherever possible.

## Who Benefits From Preservation?

The taxpayer benefits because, in general, open space requires less in the way of municipal services than taxes paid on such properties. Developed properties require greater services than the taxes paid.

Farmers benefit because they have more or less guaranteed access to land, and there remains enough farmland to provide for a critical mass. Farmers also benefit from lower taxes, particularly estate taxes, when their land is limited to agricultural use.

The residents of hamlets and villages benefit from greater density in and around their business centers through greater accessibility to stores and community amenities. Property values are likely to go up and taxes moderated.

Businesses benefit from the broad economic growth this all supports and the tourism it promotes.

## Principles of Preservation in the Town

As Southold Town considers its role in preserving its character, it is important to

agree on principles of preservation. I propose the following:

- Insofar as possible, preservation should result from voluntary acts on the part of property owners.
- Insofar as possible, preservation acts should be rewarded with some form of compensation or tax benefit.
- Insofar as possible, the burdens of preservation should be distributed broadly.
- Preservation should be at modest public cost.

It is not necessary to have an elaborate preservation program to achieve the desired ends. It is more important to preserve some properties that are generally regarded as significant by the public at large.

There is no one right way to do all this; rather, there are many ways, none perfect, each tailored to the needs of individual owners which result in a reasonable stock of preserved land through the Town.

## Preconditions for Effective Preservation

- People in leadership positions (Planning Board, Town Board, etc.) should speak out openly to establish the principles of preservation in the public mind.
- Suitable legislation should be on the books to support the implementation of such principles.
- Some reasonable level of funding should be available, perhaps on a revolving fund basis, to finance planning and acquisition efforts.
- There must exist a good-faith relationship between land owners — those whose land would be preserved — and the general public benefitting from preservation.

## Preservation Strategy and Preservation Tools

The strategy should incorporate several separate elements which, when integrated, result in achievements greater than any one element alone. Here are

some of them:

- Transfer of development rights: A basic tool fitting most of the principles above but having somewhat limited applicability.
- Long-term estate planning: Plans drawn up individually with major property owners in the Town.
- Conservation easements: A way to preserve land that provides significant estate, property, and charitable tax benefits to owners.
- Purchase of development rights program.
- Limited development plans with provision for preserving much of the property.

## Negotiated Preservation and its Implications

Experience has shown that the existence of a municipal open space program in and of itself does not necessarily result in effective land preservation. The issues facing landowners as they consider the future use, ownership, and management of their land are simply too complex. This being the case, the Town should consider ways of providing technical assistance to landowners such that the full range of preservation tools can be applied to the special circumstances of the landowner and the significant attributes of the land itself.

Successful preservation requires good-faith brokers who can bring two sides together. It also requires a fund to support, at least in part, the costs of technical assistance to landowners. In effect, preservation should be viewed less as the inexorable product of a well-crafted but impersonal municipal program, but rather as the result of many negotiated, or brokered, agreements between landowners, municipalities, and private conservation organizations like Peconic Land Trust.

*Tom Wickham's family has farmed on the North Fork for more than three centuries. He is a former Peconic Land Trust board member and present supervisor, Town of Southold. These are Mr. Wickham's views, not official town policy.*



## Report From Quail Hill Farm

Since 1990, it has been the intention of the Peconic Land Trust to enable Quail Hill Farm to become a completely self-sufficient organic farm. This past season, the Farm's fourth, the stewardship staff took another important step toward that goal by constructing a small greenhouse to grow starter plants for transplanting to the fields (during the first seasons, starter plants were purchased from another organic grower, Larry Halsey of The Green Thumb in Water Mill). The demand on this greenhouse quickly exceeded its capabilities, as the Farm staff

kept pace with the needs of Farm members for fresh, organically grown produce.

Quail Hill now has a larger, 672 sq.



*Memories of February's deep freeze were preserved by Stewardship Coordinator Scott Chaskey at the Quail Hill Preserve.*

ft. greenhouse, located in the valley. Facing south, this greenhouse is a double-insulated plastic, "hoop" structure with fans for air circulation.

Along with the seeding of flowers, tomatoes, which require a long lead time before producing, will be started, followed by lettuce, eggplant, tomatillo, peppers, cabbage, celery, parsley, scallions and leeks.

The new greenhouse will not only allow greater control of the Farm's production and growing timetable, but will also provide an important benefit to the community. In its ongoing education programs in conjunction with local schools, the Farm will involve children in seed planting and in transplanting young plants to the field when

the weather is warm enough. The children of Farm members will have an opportunity to participate in this work as well.

## THE BOTTOM LINE ON TAXES AND PHILANTHROPIC GIVING

With the passage of the Omnibus Budget Reconciliation Act in 1993, the taxes of most middle and high-income taxpayers will be raised, affecting the ways you spend, invest, run your business and household, plan your estate, and support your favorite charities. Fortunately, the new law also contains tax-saving opportunities. Properly planned charitable gifts can simultaneously lower your tax bill, provide for your family's needs, and support vital non-profit organizations such as the Peconic Land Trust. This is the first in a series of informative columns that will discuss ways to improve your bottom line. Some tax-wise gift opportunities to consider . . .

**It's generally better to contribute stock than cash.** By donating appreciated stock which you've owned for at least one year, you avoid paying capital gains tax (the top rate remains at 28%) when the stock is sold, and you receive an income tax deduction for the market value of the securities at the time of the gift. It's easy to donate stock.

**Gifts of appreciated property are now fully deductible.** Under the new tax law, you may now deduct the full fair market value of appreciated securities, real estate, art and other tangible personal property, without

triggering the Alternative Minimum Tax on capital gains. Such gifts are no longer "tax preference items" subject to the Alternative Minimum Tax.

**Valuable art and real estate.** By donating a work of art, primary residence, vacation house, farm or undeveloped property to the Peconic Land Trust, you can gain an immediate income tax deduction, avoid capital gains taxes upon sale or transfer of the asset, and avoid estate taxes which your heirs may find burdensome. Through a "reserved life estate" arrangement, you can even donate a house or land today and continue to use it for your lifetime, while still qualifying for an immediate tax deduction.

**Donate a life insurance policy.** You'll receive a charitable deduction by donating an existing life insurance policy that you no longer need, or by purchasing a new policy and naming the Peconic Land Trust as both owner and beneficiary. Check with your insurance agent for details.

*The Peconic Land Trust would like to thank Brandywine Conservancy, Chadds Ford, PA for granting us permission to reprint the above information. We would be happy to assist you and your financial*

*advisor with philanthropic gift planning. Your inquiry will be treated confidentially. Please call Marsha Kenny at (516) 283-3195.*

### Wish List

Don't forget . . . gifts of goods and services, or items on our "Wish List" will help the Trust stretch its conservation dollars. Please call our office, 516-283-3195 if you can provide any of the following . . .

- Kodak Carousel Slide Projector
- Zoom lens for Kodak Carousel slide projector
- Copier
- MacIntosh LaserWriter IINT
- Printer
- Flat bed trailer
- Shelving
- Tractor (40-50 H.P. with bucket loader)
- Welding equipment
- Table saw



## Land Trust Alliance/New York

With land trusts numbering more than 1,000 in the United States, the movement has experienced significant growth in recent years. This is particularly true in New York, where the number of land trusts has doubled in the last five years to 65, and land under stewardship responsibility has increased to 70 thousand acres. "Since the state is one of the most active in land trust activity in the nation, the Land Trust Alliance saw the need and the benefit of having a presence here, and selected New York for its first pilot regional office in 1993," according to Darlene McCloud, LTA/NY's director.

LTA/NY's mission is to foster the expansion of an effective and lasting land trust movement in the state, and to ensure that land trusts have the information, skills and resources necessary to protect land. During its first year, LTA/NY, which is located in Stanfordville, has established a strong presence as a central source of information, technical assistance and coordination for land trusts throughout the state.

For organizations such as the Peconic Land Trust, McCloud stresses the importance of land trusts meeting with each other, sharing experiences and providing opportunities for staff development. A New York State Advisory Committee, of which John v.H. Halsey is a member, was formed. Comprised of land trust representatives and other individuals dedicated to land conservation efforts in New York, the committee combines its advisory roles with an educational function at round-table discussions held quarterly around the State. In addition, LTA/NY

will launch a statewide land trust referral network in 1994, enabling the organization to connect land trusts with knowledgeable sources of expertise to other groups working on similar projects.

Other areas in which LTA/NY has been active include the Rural New York Grant Program which was launched in April 1993 with funds from the J.M. Kaplan Fund. This program provides small but strategically placed grants to New York land trusts to strengthen their organizations and their land-saving capabilities. In 1993, \$87,000 was awarded to 28 land trusts serving 23 counties across the State. In the area of public policy, LTA/NY's first effort was to organize support for New York State's Environmental Trust Fund. LTA will continue to work with local land trusts and the statewide environmental community to implement the new Trust Fund and to maximize the funds dedicated to land acquisition and the protection of open space.

LTA/NY's 1994 agenda for expanded public policy action and education includes facilitating land trust involvement in the Open Space Plan, assisting efforts of the American Farmland Trust to ensure effective implementation of the Agricultural Protection Act, addressing property tax issues related to conservation, and coordinating land trust support for a revised recreational use statute. John Halsey comments, "This is an ambitious agenda, to say the least, but so important to the many land trusts in New York State. Given the complexity of individual conservation projects, land trusts rarely

have the time to devote to statewide policy issues. LTA/NY can do this as it facilitates the exchange of ideas and experiences among New York's land trust community."

*If you or someone you know has an interest in land conservation in New York State, you may request more information by contacting the Land Trust Alliance of New York at P.O. Box 47, Stanfordville, NY 12581, (914) 868-1425.*

## 10th Anniversary Challenge Grant

In recognition of its 10th Anniversary year, five donors presented the Trust with its greatest challenge to date: to match a grant of \$200,000 by October 30, 1993. Thanks to the loyal support of hundreds of contributors, the Trust successfully met the challenge, and was the beneficiary of an additional \$50,000 gift from The William and Mary Greve Foundation as a result.

Funds raised through the Challenge Grant underwrite a significant portion of the Trust's work, including conservation planning, the acquisition of land and conservation easements, and the stewardship of protected land. Although the Trust has accomplished much during its first 10 years, there is still much more to be done. With present and future conservation efforts in mind, the 1994 Challenge Grant will have its official kick-off at the annual Peconic on June 12.

### **HELP PECONIC LAND TRUST PROTECT OPEN SPACE AND FARMLAND**

The Trust provides farmers and other landowners with unique alternatives to development. Please remember that matching gifts, offered by many employers, can double or triple the value of your gift. Please take a moment to check with your employer and enclose appropriate forms, if eligible. We appreciate your support.

I/we are pleased to support Peconic Land Trust's conservation efforts.

Enclosed is donation in the amount of \$ \_\_\_\_\_

\_\_\_\_\_ Please send me information on alternative methods of supporting the Peconic Land Trust.

Name \_\_\_\_\_

Address \_\_\_\_\_

\_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_ Phone \_\_\_\_\_

*A gift to Peconic Land Trust is tax-deductible. All donors will be provided with a written acknowledgment for tax purposes. A copy of the last financial report filed with the Department of State may be obtained by writing to: 1) New York State, Department of State, Office of Charities Registration, Albany, NY 12231, or 2) Peconic Land Trust, P.O. Box 2088, Southampton, NY 11969.*





PECONIC LAND TRUST

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## The Melting Land

*Amy Salerno*

As the spring fights away all signs of winter  
an icicle lingers,  
while violet light cast from a simmering candle  
drips through skeletal trees.  
Your breath stands still,  
in an infinite mist.

*Amy Salerno is a senior at Pierson High School,  
Sag Harbor.*



## Mission Statement

The Peconic Land Trust is a non-profit, tax-exempt conservation organization dedicated to the preservation of farmland and open space on Long Island. To this end, the Trust acquires and manages land as well as easements for conservation purposes. In addition, the Trust assists farmers and other landowners in the identification and implementation of alternatives to outright development.

### Peconic Land Trust, Inc.

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