



**2010 Annual Report**  
**Westmoreland Land Trust**



## Third Year Accomplishments, 2010

Four broad objectives for 2010 were set at the January annual meeting: acquire more properties, establish a stewardship protocol, raise funds, and develop an organizational identity.

Three of these four objectives were accomplished. The lone exception is property acquisition. We did not have signed sales agreements on any new properties by the close of the year. However, we made major strides in that direction and anticipate closing on four additional properties in the first quarter of 2011.

The Westmoreland Land Trust held five board meetings during 2010, a number of committee meetings, and hosted a free-to-the-public workshop on the topic of nonprofit fundraising that attracted a capacity crowd.

**We are particularly grateful to the Westmoreland County Commissioners who made the land trust a line item in the county budget and appropriated \$10,000 for the trust's third-year administrative expenses.**

### PROPERTY

No new properties were acquired in 2010. However, a number of potential land acquisitions were considered and, from these, the next round of prime candidates was identified and **work began toward acquisition**.

We prepared a grant request to the Pennsylvania Department of Conservation and Natural Resources in the hope of obtaining a significant portion of the funds necessary to acquire these parcels (see *Fundraising*).

In the latter portion of the year, we initiated a **prospecting campaign** that included letters (and follow-up phone calls) to officials in 32 area municipalities, reintroducing our organization and asking for property recommendations. A news release with the same information and extending the invitation for input to the public was issued to the local media (see *Communication and Outreach*). The invitation also was posted on the trust's website.

From this effort, we received seven property suggestions via our email address, two property suggestions via phone calls from the public, and two property suggestions via phone calls with municipal officials. The Property Committee is evaluating each for its suitability.

## STEWARDSHIP

The Stewardship Committee established **a land-management philosophy, general stewardship policies, and site-specific plans for caring for the properties we have acquired.**

After the opportunity for input, the full board approved the stewardship policy at the June 18 meeting and it has since been posted on our website, [www.wcdpa.com/landtrust](http://www.wcdpa.com/landtrust).

This work by the Stewardship Committee will help us to gather baseline data on the property's natural resources and features at the time of acquisition...to identify appropriate future uses...and to set in place a long-term care plan.

Beyond their obvious value in providing good property stewardship, these new documents also will help us achieve accreditation from the Land Trust Alliance, should we seek that in the future.

Eleven volunteers collected one truckload of trash (approx. 20 bags), and 18 tires during the **cleanup of the Cabin Hill property** on April 8.



Mark Bowers worked with Westmoreland Cleanways to organize this stewardship event, which also was supported by the City of Greensburg and Spino Tire Service.

Volunteers included: John Albertson, Mark Bowers, Chuck Duritsa, Michael Felice, Alex Graziani, Karen Jurkovic, Ellen Keefe, Paula Korber, Mike Kuzemchak, Loree Speedy-Bowers, and Delia White.

Stewardship Committee members visited each of the trust's four properties during the year and compiled a **comprehensive report on the condition of each.** These baseline assessments are key to good stewardship of the properties. The Stewardship Committee plans to conduct site assessments of each property at least once a year.

Per our agreement with the Ackermann family, "No Hunting" signs were purchased and posted on that property this fall. Additionally, copy and a layout for general property signs were developed in 2010. We plan that these signs will be fabricated and posted in 2011.

## COMMUNICATIONS AND OUTREACH

Megan Hughes, program manager for the Environmental Finance Center of the University of Maryland, presented a program at our January meeting on **"Fundraising for Nonprofits."**

This portion of the trust's meeting was open by invitation to representatives of other nonprofits. Westmoreland Cleanways, Jacobs Creek Watershed Association, Western Pennsylvania Conservancy, Sewickley Creek Watershed Association, and eight other nonprofit organizations sent representatives, and we had a standing-room-only crowd.

Megan's presentation was recommended and financially supported by the Westmoreland County Agricultural Land Preservation Program. The Community Foundation of Westmoreland County also helped to sponsor the event.

The Communications and Outreach Committee worked with an area graphic artist to **develop a professional logo and essential collateral** (letterhead, envelopes) for the organization. This creative work was reviewed and approved by the entire board at the April 9 meeting.



The trust issued two **news releases** during the year: one on the Cabin Hill parcel cleanup and one inviting the public to suggest properties for preservation. The latter helped to spur a Tribune-Review feature story on area land trusts, which featured the Westmoreland Land Trust in the lead and photo, on Sunday, December 26.

We continued to use our **website and our Facebook page** to promote the organization throughout the year.

## FUNDRAISING

At year-end, we received our **first-ever private foundation gift**: A \$50,000 donation from the Katherine Mabis McKenna Foundation.

We prepared and submitted a request that **successfully netted us a \$166,000 grant** from the Pennsylvania Department of Conservation and Natural Resources for pending property acquisitions.



We developed the land trust's **organizational profile for the new Westmoreland Gives website**.

This profile allows potential donors to read about the trust and to immediately make an electronic donation if they so choose.

The profile also made the land trust eligible to participate in the first-ever Day of Giving on December 1. On this day, gifts made through that site were eligible for a percentage match from the Community Foundation of Westmoreland County. In addition, an anonymous donor volunteered to match the CFWC's match to the land trust.

In all, the land trust received \$2,676.67 from 18 donors in this single-day campaign.

Our annual mid-year fundraising **campaign targeted to board members** raised \$1,775 from 14 board members.

At year-end, we also had **pending a request for a grant of \$10,000** from the Pennsylvania Department of Community and Economic Development to help with out education and outreach efforts.

## **FISCAL ADMINISTRATION**

The Audit Committee worked with CPA Regis Tomsey to obtain **an audit review of the trust's 2009 finances**. Mr. Tomsey found nothing in the trust's financial records that was in need of modification.

We are able to employ a financial review, rather than an audit, because we have less than \$25,000 in assets. Copies of the Mr. Tomsey's written review were provided to all board members.

In late summer, the Finance Committee established and the board approved **a temporary operating budget with line items for the remainder of 2010**. With this in place, the organization could purchase the services and goods provided for in the budget without having to obtain board approval for each individual expenditure.

The board retained the option to amend the budget at any time, and noted that the inclusion of a line item expenditure does not obligate the organization to incur that expense.

Likewise, a **working budget was prepared in the same manner for 2011**.

The Finance and Governance committees prepared a **policy for procuring and managing outside services as well as an RFP**. All were reviewed and approved by the full board.

Our treasurer filed the organization's **990N** for 2009.

She also reallocated **\$5,000 of the trust's income to a reserve account**, in accordance with the wishes of the donors of those funds, who earmarked them for maintenance of the Ackermann Reserve.

## LEGAL/LIABILITY CONCERNS

We worked with Westmoreland County to craft a **written cooperative agreement regarding stewardship responsibilities** for those properties that the county is holding for us. These currently are the Ackerman and Cabin Hill parcels.



We submitted the organization's **required charitable organization filings** with the Pennsylvania Department of State.

## BOARD

Board members voted at the January meeting to retain the existing slate of **officers for 2010**: Chuck Duritsa, chair; Bruce Corna, Jr., vice chair; Virginia Stump, treasurer; and Karen Jurkovic, secretary.

Betty Reefer, whose term expired on December 31, 2010, opted to step down from the board at the completion of her term.

Betsy Aiken, Ted Kopas, Mike Kuzemchak, Larry Larese, and Tony Quadro, whose terms likewise expired on December 31, 2010, indicated an interest in continuing their service. A vote on board membership is scheduled for the January 21, 2011 meeting.

## ADMINISTRATIVE

A **remote backup system** was put in place for the trust's electronic files. Files also continue to be backed up on a jump drive and in hard-copy form.

## OTHER

The Westmoreland Land Trust signed on as an organizational supporter in the effort to **Renew Growing Greener**, a state-based source of funding for conservation efforts.

Several of the trust's board members volunteered to participate in the **Turtle Creek Gorge project**. This area of the county is mostly floodplain, with steep slopes and so has significant stormwater and flooding problems. Access to the railroad property at this time is uncertain. The volunteers are evaluating the property for both its positive and negative characteristics and will see where these rankings overlap. The group also is seeking to raise both funding and public awareness.



**Westmoreland Land Trust**  
**Income and Expense Statement**  
**1/1/2010 through 12/31/2010**

**INCOME**

Donations	\$ 4,701.67	
Grant-Westmoreland County	10,000.00	
<b>TOTAL INCOME</b>		<b>\$ 14,701.67</b>

**EXPENSES**

General Expenses	\$ 672.72	
(Copies, Postage, Meeting Refreshments, Office Supplies)		
Meeting Advertisements	103.20	
Charitable Orgn Registration	15.00	
Dues	390.00	
D & O Insurance	918.00	
Appraisal Fees	4,150.00	
Legal Fees	0.00	
Audit Review	300.00	
Logo Design	2,000.00	
Educational Speaking Fees	336.91	
Refund (Westmoreland Cultural Trust)	148.00	
Ackermann Property Maintenance	183.54	
<b>TOTAL EXPENSES</b>		<b>\$ 9,217.37</b>
<b>NET INCOME (LOSS)</b>		<b>\$ 5,484.30</b>

**Westmoreland Land Trust**  
**Statement of Cash Flows**  
**1/1/2010 through 12/31/2010**

<b>CASH ON JANUARY 1</b>		<b>\$ 15,087.89</b>
CASH FROM OPERATING ACTIVITIES	\$ 5,484.30	
DEPRECIATION & AMORTIZATION	0	
INCREASE (DECREASE) IN ACCOUNTS RECEIVABLE	0	
INCREASE(DECREASE) IN PREPAID EXPENSES	0	
INCREASE(DECREASE) IN ACCOUNTS PAYABLE	0	
CAPITAL EXPENDITURES	0	
PROCEEDS FROM SALE OF EQUIPMENT	0	
PROCEEDS FROM SALE OF INVESTMENTS	0	
PAYMENT OF LONG-TERM DEBT	0	
<b>INCREASE (DECREASE) IN CASH</b>	<b>\$ 5,484.30</b>	
<b>CASH DECEMBER 31, 2010</b>		<b>\$ 20,572.19</b>



**Westmoreland Land Trust**  
**Balance Sheet**  
**As of December 31, 2010**

**CURRENT ASSETS:**

Cash and Bank Accounts	\$20,572.19
Accounts Receivable	0
Prepaid Expenses	0

**TOTAL CURRENT ASSETS** \$20,572.19

**LONG-TERM ASSETS:**

None	0
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**TOTAL ASSETS** \$20,572.19

**SHORT-TERM LIABILITIES**

Accounts Payable	0
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**LONG-TERM LIABILITIES**

None	0
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**EQUITY** \$20,572.19

Aukerman Reserve	\$4,816.46
Unrestricted	\$15,755.73

**TOTAL LIABILITIES & EQUITY** 20572.19



**WESTMORELAND  
LAND TRUST**

**2011 Objectives**

Finalize agreements and administrative requirements for the properties currently identified for purchase.

Raise funds for operating and property purchase reserve.

Encourage routine committee meetings with outcomes reported to full board.

Enhance communication and outreach efforts.

Purchase and post property signs.



## Mission

To conserve and steward lands and waters of Westmoreland County that harbor ecological, scenic or recreational qualities to offer a healthier and more sustainable future for all.

## Vision

All Westmoreland County residents and visitors enjoy the scenic and natural value, accessibility and quality of open space conserved. Throughout Westmoreland County recreational land abounds, water resources are protected, wildlife flourish, and the quality of life is high because of the continuing work of the Westmoreland Land Trust complementing the work of like-minded entities.

## Values

The Westmoreland Land Trust values the following.

Conservation of diverse real property that is in, or in close proximity to, Westmoreland County and culturally, historically, ecologically, recreationally, or scenically valuable

Restoration, protection, and maintenance of conserved property as appropriate for its best long-term stewardship

Partnership with public or private entities where beneficial to encourage collective effort

Research and planning in support of conservation efforts

Promotion and education of conservation opportunities and benefits

Conformance with the Land Trust Standards and Practices published by the Land Trust Alliance in 2004, or as amended

## 2010 Board of Directors

Betsy Aiken

Mark Bowers

Bruce J. Corna, Jr.  
*Vice Chair*

Chuck Duritsa  
*Chair*

Carolyn Graham

Alex Graziani

Representative  
R. Ted Harhai

Karen Jurkovic  
*Secretary*

County Commissioner  
Ted Kopas

Mike Kuzemchak

Larry Larese

H. Lewis Lobdell

John Lohr

Representative  
John Pallone

Tony Quadro

Vincent Quatrini, Jr.

Betty Reefer

Malcolm Sias

Lisa Smith

Virginia Stump  
*Treasurer*

John Ward