



Westmoreland Land Trust

Annual Report 2012



Fifth Year Accomplishments – 2012

Five meetings of the Westmoreland Land Trust were held in 2012.

Our objectives for 2012 were agreed upon at the January annual meeting:

- finalize agreements and administrative requirements for the properties currently identified for purchase...and continue to pursue new properties for acquisition
- reach out again to municipalities
- raise funds for operating and property purchase reserve
- actively seek and recruit local municipal officials to serve as board members
- encourage routine committee meetings with outcomes reported to full board
- enhance communication and outreach efforts
- purchase and post property signs.

Most of these objectives were accomplished. The most difficult proved to be the first objective's charge to finalize acquisition of the properties currently identified for purchase. Despite steady work and incremental accomplishments, those acquisitions were not totally completed by year-end (*see details in Property section below*).

PROPERTY

No new properties were acquired in 2012.

Work on acquiring multiple specific properties in Murrysville, as proposed in the grant we were awarded by the Pennsylvania Department of Conservation and Natural Resources, continued but **we were not able to achieve signed contracts on the properties by year's end.**

We were **successful in obtaining a verbal commitment for a waiver of surface rights from EQT for a property in Murrysville** that the trust purchased in 2011 as part of the DCNR grant.

We have until the end of 2013 to execute the terms of the DCNR grant.

The land trust **finalized effort related to its 2011 work** -- in cooperation with the Western Pennsylvania Conservancy and the Loyalhanna Watershed Association -- **to secure conservation of the Pingor parcel** fronting on State Route 30 in Ligonier Township.

For this project, the land trust received pass-through grant funding of \$50,000 from the Katherine Mabis McKenna Foundation. The grant was received and the four-acre property was acquired during 2011, with follow-on administrative effort by the land trust completed during 2012.

The Loyalhanna Watershed Association will assume ownership of the parcel to yield protection of approximately 25 acres along that area of the Route 30 corridor.

We also continued to **review a variety of other properties for possible acquisition** – including several that were brought to us by members of the public interested in donating or selling properties to our organization.

We are hopeful that several of these properties will eventually be acquired by the land trust.

STEWARDSHIP

Toward the end of the year, we received a letter from Sunoco Pipeline LLC regarding survey work that company is doing for a **potential pipeline project that could have an impact on the Ackermann Reserve** in North Huntingdon Township.

At this time, it is thought that the only areas that would be disturbed are the parking area and the small pathway leading to the reserve trails.

We will continue to monitor this situation.



The Ackermann Reserve

Stewardship Committee members visited the Ackermann Nature Preserve and the Cabin Hill property during the year and compiled a **comprehensive report on the condition of each.**

These annual assessments are key to good stewardship of the properties.

At the end of 2011, an **Eagle Scout project** was approved to clear walking paths, mark a new trail, build a new bench, and reconstruct a small

bridge at the Ackermann property.

This project was successfully completed with financial support from the land trust for building materials.

FUNDRAISING

Westmoreland County Commissioner Ted Kopas reported that the land trust **would not receive an annual allocation from Westmoreland County in 2012.**

Our annual allocation from the county for the past several years was \$10,000 and it was the only dedicated funding our organization received.

Chairman Chuck Duritsa and Board member Larry Larese met personally with all three County Commissioners in June to discuss the land trust, its goals and accomplishments, and its need for county funding support.

Westmoreland County will be receiving money from Act 13/Marcellus shale impact fees and the commissioners held a series of public meetings to gather public input on how the money should be allocated.

Chairman Chuck Duritsa **attended and made the case for the land trust.**

A decision on the Marcellus Legacy Fund allocation by the County Commissioners was pending at the end of 2012 and the land trust was confident that it would receive an allocation from this fund.

Commissioner Ted Kopas donated his 2012 pay raise to four select organizations in the county, one of which was the Westmoreland Land Trust.

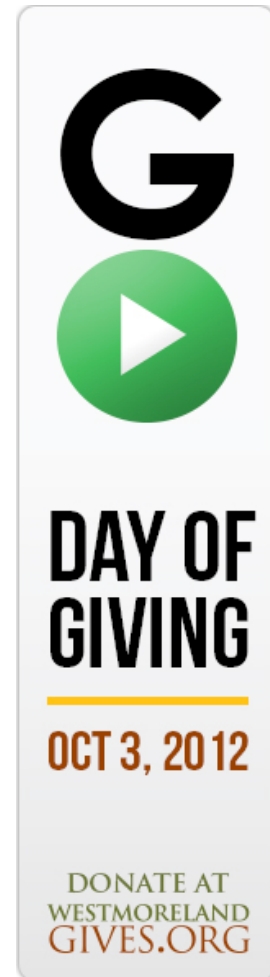
We increased our outreach efforts and raised a grand total of **\$3,171.91** on the third-ever Day of Giving on October 3, **making it the most successful fundraising drive -- both in terms of number of donors and number of dollars** -- in our young organization's history.

The number of people who donated to the land trust jumped dramatically, from 11 in 2011, to 33 in 2012. This is a welcome outcome, given our desire to build a database of friends of the organization (*see following item*).

The total amount donated to the land trust on the 2012 Day of Giving was \$2,855, and matching funds from the Community Foundation of Westmoreland County grew that number to \$3,171.91.

In addition, we received a donation of \$250 outside of the Day of Giving, bringing our 2012 fundraising total to **\$3,421.91.**

Jeff Forester, senior consultant for the Bayer Center for Nonprofit Management, led us in a discussion of **how to develop a fundraising database** at our August 17 meeting.



He explained that much giving comes from an emotional place in the giver, and that a personal appeal is the most effective way to reach that emotional place.

He had the board do several exercises to help identify opportunities to increase our fundraising ability.

As a result of this presentation, we undertook a new outreach effort, asking each board member to mail 10 postcards to his or her personal connections, explaining the Day of Giving and asking them to support the land trust.

This effort, along with an increased presence on Facebook, appears to have been very effective, resulting in our most successful fundraising effort to-date (*see previous item*).

2012 DONORS

Partner

\$500 to \$999

Betsy Aiken

Michael and Karen Jurkovic

Joseph Kalinowski

Mary Jane Kelly

Associate

\$250 to \$499

Charles and Judy Duritsa

Representative R. Ted Harhai

Lewis and Katherine Laffey Lobdell

The Community Foundation of
Westmoreland County

Commissioner Ted Kopas

Larry Larese

David Lester

Thomas Lindqvist

John Lohr

Linda Marts

Regis and Jamie McHugh

Debra O'Neill

Donor

up to \$249

Thomas J. Balestrieri

Charles Richard Byers

Bruce and Joelle Corna

Janice Davis

William Doney

J K Folmar I

Alexander Graziani

John M. Guzzy

Leonard and Linda Hess

Stephen and Susan Huba

Daniel Painter

William Pfouts

Gregory Phillips

Barbara Price

Anthony Quadro

Michael Quatrini

Vincent Quatrini, Jr.

Joann Seabol

Daniel Stoner

Virginia Stump

Joseph and Mary Lou Tarara

John Ward



Design of the trust's new six-foot banner

COMMUNICATIONS AND OUTREACH

Early in 2012, we **launched the land trust's stand-alone website.**

We developed the site in conjunction with the Bayer Center for Nonprofit Management, with funding assistance from a grant from the Pennsylvania Department of Community and Economic Development.

Several board members volunteered to attend a training session and are now able to edit and update the site's content as needed.

In addition to the website development, we used the **\$10,000 grant from the Pennsylvania Department of Community and Economic Development** to procure a number of communications and outreach items and services.

The money was used to

- develop a database (*see "friends" item below*)
- update our capabilities brochure
- print letterhead and envelopes, and
- print and mail special event notices;

and to obtain some needed equipment and materials, including:

- 17" display Macbook Pro laptop computer
- Digital projector
- Laser pointer
- Software: QuickBooks, Office for Mac, Outlook
- Case/Dolly for projector and laptop
- Digital camera
- 6-foot horizontal banner
- 3-foot vertical banner (for tabletop), and a
- banner stand (for tabletop).

After canvassing similar organizations and evaluating their input, Development Committee members recommended and the board approved the **establishment of a “friends” program for building community involvement in the land trust.**

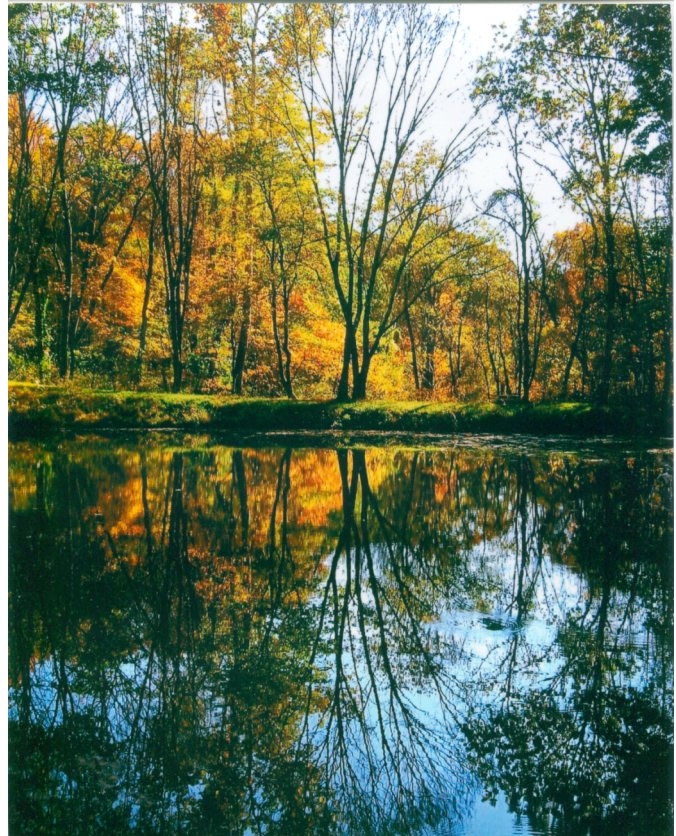
The “friends” format will not require us to adapt the bylaws or to host an annual meeting, and will allow for a relatively easy conversion to a “members” format, should the organization decide to go that way in the future (the reverse transition is not as easily accomplished).

Development Committee chair Lewis Lobdell prepared a policy, which was adopted by the organization.

We are working with the Bayer Center for Nonprofit Management to enter the “friends” information into an effective database format.

Other outreach efforts included:

- issuing news releases
- a lunch **presentation on the trust** by Chairman Chuck Duritsa to the Pennsylvania Association of Retired State Employees in October
- remarks by Betsy Aiken at the **Grand Opening of the Peter and Victoria Skena Nature Reserve** in May
- encouraging trust board members to **attend events hosted by other, likeminded organizations** as a way to promote awareness of the land trust, and
- **Facebook** updates.



The pond at the Skena Nature Reserve
Photo taken by Clarence Skena

FISCAL ADMINISTRATION

The Audit Committee requested RFPs from a number of firms for **the trust’s 2011 audit**, which would be **the most extensive to-date** due to our receipt of a \$50,000 grant from the McKenna Foundation (pass-through for the Pingor property).

The committee selected Rennie and Associates (which recently assumed the operation of retiring CPA Regis Tomsey) to obtain **an audit review of the trust’s 2011 finances.**

Rennie and Associates found our statements in conformity with the cash basis of accounting and found nothing in the trust’s financial records that was in need of modification.

Of concern was the audit’s finding that:

“The revenue recognized by the Westmoreland Land Trust is from state and county grants, and monies from private foundations and donors. The donor base

at this time is small, and without the three large donations there would not be enough revenue to fund the Westmoreland Land Trust's cause. As state and local budgets tighten, money may not be available to fund preservation causes which are not often deemed as fundamental."

Copies of the audit were provided to all board members.

Even though the amount of interest earned was small, the organization continued to operate with **an interest-bearing checking account** for the year.

Our treasurer established a **separate reserve fund within the budget for the \$10,000 DCED grant funds.**

She also continued to maintain another separate reserve for maintenance on the Ackermann property.

In November, the Finance Committee developed **a draft operating budget with line items for 2012.**

The high (52%) administrative to overall cost ratio in 2012 is the result of the one-time, \$10,000 DCED grant that was used for education and outreach...and the low 2011 ratio was due to the pass-through of the \$50,000 McKenna grant for the Pingor property in Ligonier Township, the purchase of which was handled by the Western Pennsylvania Conservancy.

Our treasurer filed the organization's **990-EZ** for 2011, and the **Pennsylvania sales tax exemption** forms.

After extremely protracted and frustrating attempts to obtain an **organizational credit card**, our bank denied our application in the fall.

We will be talking with other, more locally focused banks in the coming months to see if we might get a credit card through them.

LEGAL/LIABILITY CONCERNS

We submitted the organization's **required charitable organization filings** with the Pennsylvania Bureau of Charitable Organizations.

We **maintained insurance for our directors and officers** during the year.

BOARD

The board's request that the Governance Committee **actively seek and recruit municipal officials for board service** led to the nomination and appointment of **Alan Fossi** to our board in 2012.

Mr. Fossi has been a resident of Sewickley Township since 1976, and was recently elected as a supervisor in that community, beginning a six-year term in 2012.



Alan Fossi

An active volunteer in his community for decades, Mr. Fossi serves as a member of the Crabapple Lake Community Park Trust, a fundraiser for the Sewickley Township Library, and a member of the Sewickley Township Grant Committee.

He also served as president of the Crabapple Park and Pool board for 10 years, and as a member of the Sewickley Township Sewage Board, first as chairman (1997) and then vice chairman (1998-2007).

In the fall, we regretfully accepted the **resignation of board member Mike Kuzemchak**, who left the area for other employment.

Mike had been with the land trust since its inception, and had been a valued member of the board and the Stewardship and Property committees.

He also served on the steering committee, formed in 2007 to explore the need for a land trust.

In October, existing Board members Alex Graziani, Karen Jurkovic, John Lohr, and Vince Quatrini were **reappointed** to a three-year term, effective January 1, 2013, after all expressed an interest in continuing to serve.

Additional board members whose term expired on December 31, 2012 are Bruce Corna, Lewis Lobdell, and Lisa Smith also are up for possible reappointment.

Board members voted at the January meeting to retain the existing slate of **officers for 2012**: Chuck Duritsa, chair; Bruce Corna, Jr., vice chair; Virginia Stump, treasurer; and Karen Jurkovic, secretary.

ADMINISTRATIVE

In the fall, the land trust obtained its **own dedicated telephone number**. That number is 724-552-2402.

The **need to keep formal notes of committee meetings** and to develop and maintain an overview of each property acquired and the rationale for acquiring it led to the start of documentation of the Executive Sessions of the Board, the Property Committee, and the Stewardship Committee in 2012.

Westmoreland Land Trust
Income and Expense Statement
1/1/2012 through 12/31/2012

INCOME

GENERAL FUND

General Donations	\$3,686.91	
Grants - None		\$3,686.91

RESERVE ACCOUNTS

Donations - None

NON-OPERATING

Checking Account Interest	44.70	\$44.70
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TOTAL INCOME **\$3,731.61**

EXPENSES

GENERAL OPERATING

General Administrative	\$437.12	
(Postage/Copies/Refreshments)		
Meeting Advertisements	135.50	
Non-Capital Equipment	227.75	
Organizational Dues	400.00	
D & O Insurance	1,019.00	
Appraisal Fees	0.00	
Environmental Assessment	0.00	
Audit	1,748.00	
Domain Maintenance	91.43	
State Tax Return	100.00	\$4,158.80

RESERVE DISTRIBUTIONS

Aukerman Property Maintenance	\$250.00	
DCED Grant (\$9773.18 Used/\$226.82 Returned)	8,503.56	\$8,753.56

NON-OPERATING

Bank Charges	\$3.00	
Checking Account Interest - Returned to State	10.38	\$13.38

TOTAL EXPENSES/DISTRIBUTIONS **\$12,925.74**

NET INCOME (LOSS) **\$(9,194.13)**

OPERATING NET INCOME(LOSS) ONLY **\$(471.89)**

Westmoreland Land Trust
Statement of Cash Flows
1/1/2012 through 12/31/2012

CASH ON JANUARY 1		\$35,832.67
CASH FROM GENERAL OPERATING ACTIVITIES	\$3,686.91	
CASH FROM RESERVE ACTIVITIES	0.00	
CASH FROM INVESTMENT ACTIVITIES (INTEREST CHECKING)	44.70	
CASH TO GENERAL OPERATING EXPENSES	(4,158.80)	
CASH TO RESERVE DISTRIBUTIONS	(8,753.56)	
CASH TO NON-OPERATING EXPENSES	(13.38)	
INCREASE (DECREASE) IN ACCOUNTS RECEIVABLE	0	
INCREASE (DECREASE) IN PREPAID EXPENSES	0	
DEPRECIATION & AMORTIZATION	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	
INCREASE (DECREASE) IN CASH	\$(9,194.13)	
CASH DECEMBER 31, 2011		\$26,638.54

Westmoreland Land Trust
Balance Sheet
As of December 31, 2012

CURRENT ASSETS:	
Cash and Bank Accounts	\$26,638.54
Accounts Receivable	\$- 0
Prepaid Expenses	\$- 0
TOTAL CURRENT ASSETS	\$26,638.54
LONG-TERM ASSETS:	
None	\$- 0
TOTAL ASSETS	\$26,638.54
SHORT-TERM LIABILITIES	
Accounts Payable	\$- 0
LONG-TERM LIABILITIES	
None	\$- 0
EQUITY	
Ackermann Reserve	\$26,638.54
\$4,202.46	
Unrestricted	
\$22,436.08	
TOTAL LIABILITIES & EQUITY	\$26,638.54



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

2011 Board of Directors

Betsy Aiken

Mark Bowers

Bruce J. Corna, Jr.
Vice Chair

Chuck Duritsa
Chair

Alan Fossi*

Alex Graziani

Rep. R. Ted Harhai

Susan L. Huba

Karen Jurkovic

Secretary

County Commissioner

Ted Kopas

Mike Kuzemchak**

Larry Larese

H. Lewis Lobdell

John Lohr

John Pallone

Tony Quadro

Vincent Quatrini, Jr.

Malcolm Sias

Lisa Smith

Loree Speedy

Virginia Stump
Treasurer

John Ward

* Appointed March 16.

** Resigned September 30.

Background

The Westmoreland Land Trust was formed in December 2007 in response to citizens' desire to conserve land of special value in Westmoreland County, such as land that contributes to the local quality of life because of its scenic, recreational, environmental, historical, or cultural qualities. The trust was awarded nonprofit status by the Internal Revenue Service in January 2009, making donations to the land preservation group tax-deductible.

From its founding in December 2007 through the end of 2012, the Westmoreland Land Trust has acquired some 119 acres in five distinct communities:

- the 59-acre Otto and Magdalene Ackermann Nature Preserve in Ardara, North Huntingdon Township;
- 22 acres in Murrysville, adjacent to the Lillian Kellman Nature Reserve;
- 21 acres in Rostraver Township, along the Youghiogheny River;
- 3.5 acres in the City of Greensburg, near Cabin Hill Drive;
- 9 acres in Murrysville adjacent to Duff Park; and
- 4 acres in Ligonier Township along Route 30 (in partnership with the Western Pennsylvania Conservancy and the Loyalhanna Watershed Association).



2013 OBJECTIVES

- “Friends of Westmoreland Land Trust” is fully established and functioning.
- Existing DCNR grant for open space purchases is closed out by year-end, with the successful purchase of properties up to the allowable monetary amount as set forth in the grant.
- Transfer of ownership of the van de Venne property (existing DCNR grant match) in Murrysville to the Westmoreland Land Trust/Westmoreland County is completed.
- Foundation, government, and private funding is pursued for acquisition of properties that become available, meet our selection criteria, and for which no acquisition funds presently exist.
- Purchase and placement of property boundary signs at all lands that the land trust owns or manages is accomplished.
- Regular communications are held with the Westmoreland County Commissioners regarding ongoing funding of the Westmoreland Land Trust via Act 13 Marcellus Legacy Fund monies.
- The donation/purchase of appropriate properties that are brought to the attention of the trust is actively pursued.
- Established committees meet routinely to advance their goals, with subsequent reports to the full Board.