



Westmoreland Land Trust

Annual Report 2017





Tenth Year Accomplishments – 2017



Six regular board meetings and one special budget meeting of the Westmoreland Land Trust were held in 2017.

During the year, we accomplished the following objectives.

- Hiring an executive director and fully integrating that person in the operation and advancement of the Westmoreland Land Trust.
- Building awareness of and advocating for the land trust with the general public and with strategic audiences.
- Continuing to use our text-based selection criteria to evaluate potential projects and acquisitions.
- Continuing our active participation in the update of the Westmoreland County Comprehensive Plan.
- Continuing to encourage standing and ad hoc committees to meet routinely to advance our goals and to make regular reports to the full board.

We also made significant progress toward the following objectives.

- Completing the land conservation prioritization process.
- Making grant applications toward the acquisition of properties/easements.

More details about these accomplishments are presented throughout the report.

PROPERTY

Westmoreland County assumed ownership of a one-acre property in Mount Pleasant Township that the land trust acquired in 2015. The county will add this parcel, which is located at the intersection of State Route 982 and Welty Road, to its nearby Mammoth Park.

The parcel, which originally was donated to the Westmoreland Land Trust by Deborah Marziano, contains a section of Welty Run, the stream that feeds Mammoth Park's lake.



Parcel added to Mammoth Park Photo by Karen Jurkovic

Work continued to **identify potential areas** in Westmoreland County where we might want to **target our outreach efforts** regarding land conservation.

This effort has followed logically from our previous work to prioritize land for conservation, based on Geographic Information System mapping and an analysis of the land's ecological, historic, scenic, or recreational value.

The Westmoreland County Department of Planning and Development supported this work by providing mapping services and conducting suitability analyses with CommunityViz planning software.

We evaluated several potential land conservation projects during the year, making use of detailed evaluation criteria.

We also met multiple times during the year with landowners of **several properties** in Hempfield and Unity townships to explore the possibility of acquiring them.

STEWARDSHIP

2017 was the third year of an ongoing effort to **control invasive species, primarily Japanese knotweed, at the 59-acre Otto and Magdalene Ackermann Nature Preserve** in Ardara, North Huntingdon Township.

This work involved cutting the knotweed in the spring and treating it with herbicides in the fall.

Japanese knotweed is a non-native plant that grows rapidly, quickly shading out native species. It takes over roadsides, streambanks, forest clearings and other areas.

In the Ackermann Preserve, it had taken over an area that is a floodplain for a tributary of Brush Creek.

After three years of effort, we are pleased to say that the knotweed has been controlled within the preserve boundaries, although it is present on the properties immediately adjacent to ours.

The Westmoreland Land Trust received a donation of \$2,000 from Norbert and Joanne Ackermann in 2015 for ongoing stewardship at the nature preserve named for their family. Several of our board members also contributed funds and/or volunteer effort.



Trail-building at Ackermann Preserve
Photo by Betsy Aiken

Also at the Ackermann Preserve, **a new trail was designed and roughed-in.**

The new trail creates a loop that showcases the preserve's interior forest and provides scenic views of the quarry.

Four trail work days were held, including one that was our first participation in the United Way's Day of Caring, when we were joined by 10 volunteers from Columbia Gas of PA.

The Stewardship Committee **also placed boundary markers along the Cabin Hill property** in the City of Greensburg.

More than 60 trees were planted at the 28-acre property we added to Cedar Creek Park in 2016.

Located on top of a steep slope at the eastern edge of Cedar Creek Gorge, the property provides an important, undeveloped buffer for the gorge, which is a Natural Habitat Area and a designated Biodiversity Area of Exceptional Significance known for its spectacular wildflowers.



Cedar Creek property before tree planting *Photo by Jeff Richards*

FUNDRAISING

The second installment of a **two-year, \$75,000 funding commitment was received from the Allegheny Foundation.**

This grant enabled us to hire our first paid staff person (*see pages 6-7*).

Westmoreland County allocated \$9,500 for the Westmoreland Land Trust in 2017, a decrease of 5% from 2016.

This annual allocation is the only county funding our organization receives.



We received some \$15,200 in private donations in 2017.

Nearly \$13,400 was contributed during the year by 39 separate donors who support our land conservation work.

The majority of these donations were made through Give Big Pittsburgh in late November, which meant that they also earned matching funds -- which amounted to an additional \$1,820 -- from the Community Foundation of Westmoreland County.

Overall, the Westmoreland Land Trust ranked 34th in total dollar amount raised among the 493 nonprofits participating in Give Big Pittsburgh.

Board participation in 2017's fundraising reached nearly 100%, with 20 of 21 directors making a donation to the organization during the year.

In accordance with board action taken in 2015 to provide for ongoing stewardship, one-half of the total amount donated through Give Big Pittsburgh has been placed in the Land Trust's Stewardship Fund.

2017 Donors

Benefactor

\$10,000 and above

Allegheny Foundation

Westmoreland Conservation District

Patron

\$5,000 to \$9,999

Audrey and Gerald McGinnis

Westmoreland County

Sponsor

\$1,000 to \$2,499

Community Foundation of Westmoreland County

Ford Business Machines

Lynn and Patrick Gurrentz

Benard A. Sampson

Partner

\$500 to \$999

Arvind Paranjpe and Betsy Aiken

Eric Wallis

Jay and MaryLou Tarara

John Ward

Associate

\$250 to \$499

Gregory D. Cribbs

Charles and Judy Duritsa

Lewis and Katherine Lobdell

Pamela Siegel

Regis Synan

Theo van de Venne

Donor

up to \$249

Norbert and Joanne
Ackermann

Anonymous (2)

Cary Bohl

Mark Bowers

Tammy Colt

William Doney

Mark & Sharlene
Emerson

The First Evan-
gelical Lutheran
Church

John K. Folmar I

Martha Frech

Ted Harhai

Hilltop Social Club

Alyson Holt

Susan Huba

Karen Jurkovic

Commissioner Ted
Kopas

Larry Larese

Brian Lawrence

David Lester

John Lohr

Linda Marts

Gregory Phillips

Anthony Quadro

Malcolm Sias

Loree Speedy

Virginia Stump

OUTREACH AND COMMUNICATIONS

The Land Trust once again participated in Earth Day at the Winnie Palmer Nature Reserve at Saint Vincent College.

Board Members Martha Frech and Tammy Colt provided an activity for children and information on the land trust's work for adults at the day-long event on April 22.

Nineteen land trust board members, their families, and friends **participated as marchers and donors in the 2017 March for Parks**, the annual fundraising event for Westmoreland County's parks and trails.

The Westmoreland Land Trust team raised \$545 for this effort.



Board Members Tammy Colt and Martha Frech at Earth Day

Photo by Madeline Frech

During the year, we **issued an annual report, news releases, and made increasing use of Facebook and our website** to reach the public with our message.

ORGANIZATIONAL DEVELOPMENT

At our January meeting, the board unanimously voted to accept the recommendation of the Staffing Committee and hire Mary Tate as **our first executive director**.



Betsy Aiken

Photo by Karen Jurkovic

This hiring was made possible through a grant received in 2016 from the Allegheny Foundation, which provided funds to employ an executive director part-time for two years.

When Mary resigned on October 9 to take a position closer to her home, the Staffing Committee again solicited the board and the public for candidates, and held interviews. The executive director position was offered to Betsy Aiken, who assumed the responsibilities on December 1.

Betsy, a well-known and long-time community volunteer,

has served as a member of the Westmoreland Land Trust Board of Directors since the organization's founding in 2008. She stepped out of that role to assume this new position with the Land Trust.

Betsy has a BA and an MBA from the University of Pittsburgh. Among her many local, county, and state volunteer efforts, she co-founded the Friends of Murrys ville Parks; co-founded and leads the Murrys ville Trail Alliance; serves on the Citizens' Advisory Board for the Westmoreland County Department of Parks and Recreation; and serves on the Pennsylvania Trails Advisory Committee of the state's Department of Conservation and Natural Resources.

Having an executive director dedicated to advancing our major goals is critical to helping the land trust continue to grow.

Members of our board conducted a comprehensive assessment of the Westmoreland Land Trust's operations in 2016 and from that, a number of recommendations were identified by a local land trust consulting firm, E-Concepts, LLC, along with suggested action steps.

Addressing these recommendations will ensure that the land trust operates in compliance with nationally recognized standards of operation (*see following item*).

In 2017, **we began systematically taking steps to address these recommendations**, which included a thorough review of the organization's bylaws and a process for recruiting, educating, and training board members.

In May, the board reviewed the 2017 revision to Land Trust Standards and Practices and **unanimously voted to adopt and commit to implementing them** as guidelines for the organization's operations.

The **Westmoreland Conservation District continued to donate the use of its large conference area for the land trust's board meetings and also provided office space** in its barn headquarters for our new executive director.

Ford Business Machines donated the use of a **commercial copier/printer**.

FISCAL ADMINISTRATION AND LEGAL MATTERS

Delisi, Keenan and Associates **conducted our audit for the calendar year 2016**, and issued an opinion that our financial statements present fairly, in all material respects, and our financial position, results of operations, and cash flows are in conformity with generally accepted accounting principles.

The audit report was approved unanimously at our July 21 meeting.

BOARD OF DIRECTORS

Officers unanimously appointed **for 2017** were Chuck Duritsa, chair; Tony Quadro, vice-chair; Loree Speedy, secretary; and Martha Frech, treasurer.

Changes to the land trust board of directors during the year included the following.



Fred Bononi

Photo by Karen Jurkovic

The addition of Fred Bononi, a retired certified public accountant who practiced in Westmoreland County.

Fred has been providing guidance to the land trust since 2016 in his capacity as a volunteer with the local chapter of SCORE, a nonprofit association that provides free, confidential counseling and mentoring.

The resignation of Mike Kuzemchak. Mike had served for more than nine years on our board as a representative of the Western Pennsylvania Conservancy in his capacity as Laurel Highlands Program Director. He resigned from our board when he took a new appointment with WPC, as director of operations at Fallingwater.

At the end of the year, **seven board members were concluding their three-year terms of service and were eligible to be reappointed**, beginning January 1, 2018.

They are Mark Bowers, Chuck Duritsa, Ted Harhai, Malcolm Sias, Virginia Stump, Theo van de Venne, and John Ward.

All indicated their desire to continue to serve for another three years and a vote on their reappointment was scheduled for the first meeting of 2018.

Westmoreland Land Trust
Statement of Assets, Liabilities, and Net Assets – Modified Cash Basis
As of December 31, 2017 and 2016

	2017	2016
Assets		
Current Assets		
Cash and Cash Equivalents	\$ 128,228	\$ 107,578
Fixed Assets		
Furniture and Equipment		3,253
Land	_____	<u>10,097</u>
		13,350
Accumulated Depreciation	_____	<u>(3,253)</u>
		<u>10,097</u>
Total Assets	\$ 128,228	\$ 117,675
 Liabilities and Net Assets		
Net Assets		
Unrestricted:		
Board Designated	\$ 20,271	\$ 5,861
Available for Operations	48,027	62,667
Temporarily Restricted	<u>59,930</u>	<u>49,147</u>
	128,228	117,675
Total Liabilities and Net Assets	\$ 128,228	\$ 117,675

Note: Our treasurer converted the land trust's bookkeeping to Quickbooks™ in 2017, to allow better tracking and analysis of income and expenditures.

Westmoreland Land Trust
**Statement of Revenues, Expenses, and Other Changes in Net Assets –
Modified Cash Basis**
For the Year Ended December 31, 2017

	<u>Unrestricted</u>	<u>Temporarily Restricted</u>	<u>Permanently Restricted</u>	<u>Total</u>
Revenues and Other Support				
Grants and Donations	\$ 21,222	41,250	\$	62,472
Interest Income	372			372
Net Assets Released from Restrictions	<u>30,467</u>	<u>(30,467)</u>		<u> </u>
Total Revenue	\$ 52,061	10,783	\$	62,844
Expenses				
Zimmaro Property	\$ 5,244		\$	5,244
Special Events	122			122
Professional Services	4,826			4,826
Insurance	2,551			2,551
Conferences and Meetings	515			515
Ackermann Property Maintenance	530			530
General Administrative Expenses	1,046			1,046
Advertising	655			655
Membership Dues	786			786
Appraisals	1,200			1,200
Organizational Dues and Fees	200			200
Equipment Lease and Rent	266			266
Payroll Expenses	24,117			24,117
Land Asset Expense	10,097			10,097
Land Stewardship	<u>136</u>			<u>136</u>
Total Expenses	\$ 52,291		\$	52,291
Change in Net Assets	(230)	10,783		10,553
Beginning Net Assets – January 1	\$ 68,528	9,147	\$	117,675
Ending Net Assets - December 31	\$ 68,298	59,930	\$	128,228

Note: Our treasurer converted the land trust's bookkeeping to Quickbooks™ in 2017, to allow better tracking and analysis of income and expenditures.

Westmoreland Land Trust
**Statement of Revenues, Expenses, and Other Changes in Net Assets –
Modified Cash Basis**
For the Year Ended December 31, 2016

	<u>Unrestricted</u>	<u>Temporarily Restricted</u>	<u>Permanently Restricted</u>	<u>Total</u>
Revenues and Other Support				
Grants and Donations	\$ 16,972	111,300	\$	128,272
Special Events	1,229			1,229
Interest Income	150			150
Net Assets Released from Restrictions	<u>72,099</u>	<u>(72,099)</u>		
Total Revenue	\$ 90,450	39,201	\$	129,651
Expenses				
Zimmaro Property	\$ 69,729		\$	69,729
Special Events	2,063			2,063
Professional Services	1,923			1,923
Insurance	1,904			1,904
Conferences and Meetings	1,890			1,890
Ackermann Property Maintenance	1,070			1,070
General Administrative Expenses	1,059			1,059
Depreciation	649			649
Advertising	526			526
Membership Dues	525			525
Real Estate Taxes	123			123
Appraisals	72			72
Organizational Dues and Fees	<u>15</u>			<u>15</u>
Total Expenses	\$ 81,548		\$	81,548
Change in Net Assets	8,902	39,201		48,103
Beginning Net Assets – January 1	59,626	9,946		69,572
Ending Net Assets - December 31	\$ 68,528	49,147	\$	117,675

Note: Our treasurer converted the land trust's bookkeeping to Quickbooks™ in 2017, to allow better tracking and analysis of income and expenditures.



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

WESTMORELAND LANDTRUST

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 2016, the Westmoreland Land Trust has acquired some 235 acres in six distinct communities:

- the 59-acre Otto and Magdalene Ackermann Nature Preserve in Ardara, North Huntingdon Township,
- the 22-acre Peter and Victoria Skena Nature Reserve in Murrysville (contiguous to the 55-acre 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,
- 4 acres in Ligonier Township along Route 30 (conserved in partnership with the Western Pennsylvania Conservancy and the Loyalhanna Watershed Association),
- 16.5 acres in Murrysville adjacent to Duff Park (a property formerly part of the Norbitrol Plan of Lots),
- 49 acres in Murrysville adjacent to Duff Park and accessible from Round Top Road,
- 22 acres in Murrysville that link Duff Park and Pleasant Valley Park (providing 500 acres of contiguous natural land),
- 1 acre in Mount Pleasant Township, at the intersection of State Route 982 and Welty Road (transferred to Westmoreland County Parks and Recreation for addition to Mammoth Park), and
- 28 acres in Rostraver Township (conserved in partnership with the Westmoreland County Bureau of Parks and Recreation and added to Cedar Creek Park).



Ackermann Nature Preserve Photo by Betsy Aiken



2017 Board of Directors

Betsy Aiken*

Mark Bowers

Tammy Colt

Chuck Duritsa
Chair

Martha Frech
Treasurer

Alex Graziani

R. Ted Harhai

Karen Jurkovic

Commissioner Ted Kopas

Mike Kuzemchak**

Brian Lawrence

H. Lewis Lobdell

John Lohr

Greg Phillips

Tony Quadro
Vice Chair

Malcolm Sias

Loree Speedy
Secretary

Virginia McCracken Stump

Jay Tarara

Theo van de Venne

John Ward

** resigned December 2017 to
become executive director*

*** resigned September 2017*



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