

# ANNUAL REPORT

2011



SUDBURY  
VALLEY  
TRUSTEES

Conservation, Collaboration and  
Community since 1953

## A Year of Challenges, Opportunities, & Initiatives



Dear SVT Members,

Wow—you did it again! In the past year, because of your time, energy, and financial support, SVT had a big impact in favor of conservation. You helped protect 150 acres of land for agriculture and for nature. Through your stewardship staff and volunteers, you maintained and improved 40 miles of foot trails in our reservations, designed trails for the new Summer Star Wildlife Sanctuary, and set up service opportunities for seven Eagle Scout candidates and 450 other volunteers. You

hosted 80 events to learn about and enjoy our natural resources. You helped build a community garden in an urban neighborhood in South Framingham. And, you kept SVT in sound financial health. Thank you!

In addition to you excellent members and SVT's experienced professional staff, our effectiveness last year benefitted from a secret weapon. Two young adult AmeriCorps service members advanced our cause, giving a great boost to important aspects of stewardship and land protection. Through their efforts, we were able to make a marked increase in community outreach and education, and also complete descriptive baseline documentation on ten properties—a necessary starting-point for future comparison.

A few years ago, our national service organization, the Land Trust Alliance, established a program to accredit land trusts that could attain rigorous standards in their procedures for land transactions, property management, record-keeping, and governance. This year, SVT took major preparatory steps down the road leading to formal application in the spring of 2012. We decided to make the necessary investment because we believe that the day will come when funders, communities, land donors, and conservation-savvy members will expect land trusts with professional staffs to be accredited.

We've occupied Wolbach Farm for seven years now. This beautiful location provides an attractive environment for volunteers, staff, and visitors. The nature trail will soon be extended to a higher level on Goodmans Hill, to the top of the field at Fairbank Farm, offering a fine view of the Boston skyline. To date, Wolbach maintenance has been reasonably affordable thanks to the efficiency of caretaker Chris Wilson, the efforts of star volunteer Brad Conant, and the groups of students who help pull the grounds together each spring. Under the leadership of Laura Mattei, the Wolbach Facilities Committee has been working out the best plan for replacing the ramp at the back of the barn and thinking ahead to the sad but seemingly inevitable removal of the outmoded and deteriorating greenhouse. It's a classic design—perhaps you know someone who would like to adopt it?

### OUR MISSION:

Sudbury Valley Trustees is a regional land trust that conserves land and protects wildlife habitat in the Concord, Assabet, and Sudbury river basin for the benefit of present and future generations.

### ABOUT US:

Founded in 1953, Sudbury Valley Trustees is supported today by a membership of approximately 3,000 individuals, families and corporations throughout 36 different communities in the Concord, Assabet and Sudbury river basin. Working in close collaboration with landowners, businesses, local conservation commissions and government agencies, SVT pursues its land protection goals through land acquisition and stewardship, advocacy and education.

The organization currently owns, through gift and purchase, more than 2,150 acres in seventeen communities. In addition, it holds conservation restrictions on more than 1,550 acres and has been instrumental in preserving several thousand acres now protected by public agencies. SVT is responsible for the protection and care of 130 properties, which include wetlands, sensitive habitats, trails, open spaces, and major sanctuaries.

# A Year of Challenges, Opportunities & Initiatives

continued from the cover

We often hear statements like, “Why do you keep yourselves such a secret? I’ve lived in town for decades and have never heard of you.” We are trying to raise our profile. You might have noticed our Earth Day signs displayed last spring by about a hundred members. If you would like one for next year, please let us know. We’re exploring the potential of internet social media for communication with the rising generation. We offer free email subscriptions to two weekly publications: *Outdoors This Week*, a listing of events and outings sponsored by various organizations that might be of interest to our members, and *Nature Sightings*, an electronic send of the week’s submissions to that page of our website, which gives us a glimpse of the beautiful, elusive creatures that live among us.

You can help people become aware of us. SVT has about 3,000 members, which is a lot of households—but we’d rather have 4,000. Would you consider giving a gift membership to someone you know who shares your value of conservation? We’ll make it affordable—you can take advantage of our \$25 introductory rate. Just contact our Director of Membership, Michael Sanders, at (978) 443-5588 x111.

Another way to help increase public awareness of SVT is by inviting Ron to speak to your organization. This year, he added a new slide lecture to his repertoire. It’s called “Massachusetts’s Land and Wildlife: The History

of Our Landscape.” He also offers slide presentations about our local wildlife. All of his talks highlight the importance of SVT’s conservation work and are free of charge.

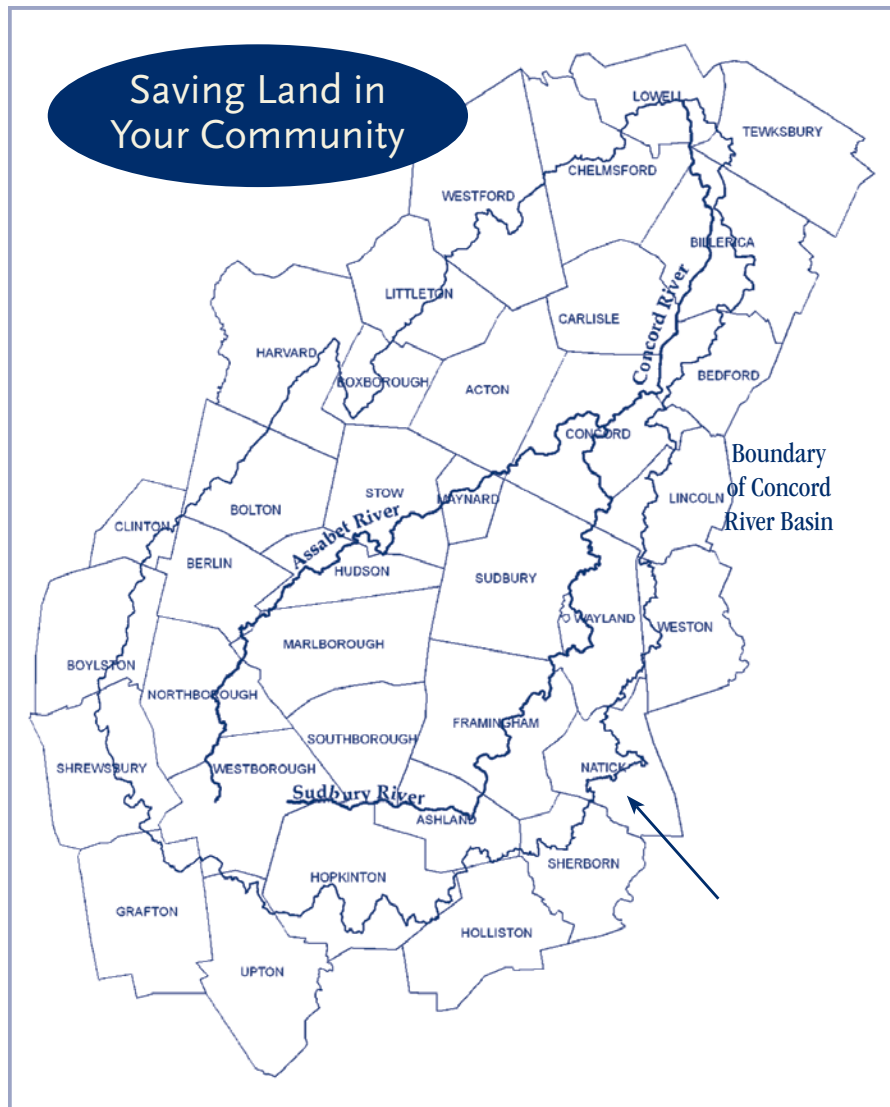
Most members seem satisfied with the amount of information they receive about SVT in this modest annual report and in our newsletter, *The Wren*. But if you’re curious to dig deeper, we would be happy to provide more details, such as our five-year strategic plan and report on our progress, our audited financial statements, or more information about SVT’s application for accreditation by the Land Trust Alliance. Any of these are available on request to our Office Manager, Nancy Hallen, x110.

Thank you for your membership in Sudbury Valley Trustees. We exist because you care, and we’re thriving because a lot of us are working hard together with a shared purpose.

Sincerely yours,

Ron McAdow, Executive Director

Colin Anderson, President



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**SUDBURY  
VALLEY  
TRUSTEES**

A SPONSOR MEMBER OF THE  
LAND TRUST ALLIANCE

## Sudbury Valley Trustees

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E-mail: [svt@svtweb.org](mailto:svt@svtweb.org) • Website: [www.svtweb.org](http://www.svtweb.org)

# OUR DONORS

2011

We are grateful for the generosity of our 3,000 members, foundations, business sponsors, and in-kind contributors who have supported SVT's conservation efforts highlighted in this report. Listed below are individuals, foundations, and businesses who contributed to our Annual Fund between between July 1, 2010 and June 30, 2011.

Due to space limitations, we are only able to list donors of \$250 and above. We wish to extend sincere thanks to all of our contributors.

## Contributions of \$10,000 and up

Anonymous (2)  
 Donna and Art Appel  
 Ms. Katherine Brobeck  
 Cile and Bill Hicks  
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 The Stevenson Family Charitable Trust  
 Stephen Winthrop and  
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 Mr. Jonathan Wicks and  
 Ms. Meredith Becker  
 Steve and Linda Wohler



SVT's Stewardship Department provided service opportunities to 208 adults and 235 youths who contributed over 1,800 volunteer hours. This EMS workgroup helped construct the Walnut Hill Trail, a keystone link to trails in Northborough, Westborough, Marlborough and Southborough.

Mrs. Evelyn Wolfson  
 Ms. Betty Wright  
 Ms. Marillyn Zacharis

## Contributions of \$500-\$999

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 Mr. Hugh W. Chandler and  
 Ms. Katherine H. Wrean

**Contributions of \$250-\$499**

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 Ms. Gwenyth Beaven  
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 Dave and Kathe Bernstein  
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 Mr. Dennis Briefer  
 John Butler and Katherine Whitehouse

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 Mr. and Mrs. Bob Iuliano  
 William and Leslie Jacques  
 Donald and Suzanne Jenkins  
 Joan and Bruce Johnson  
 Mr. Leonard Jolles



Neil Golden

SVT increased its social media presence this year, including its new electronic newsletter *Nature Sightings*.

Mark and Jody Kablack  
 Mr. Steven Kandrac and  
 Ms. Nancy Curran  
 Lauren Kaplan and Russell Green  
 James and Cherry Karlson  
 Joseph and Maxine Kasabula  
 Mr. Edward M. Kaye  
 Bill and Myra Keller  
 Wayne and Judy Keseberg  
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 Nathan and Sally Newbury  
 Mr. Gary Norris



AmeriCorps service members Thai Ha-Ngoc and Erin Snook were valuable contributors to the SVT team in fiscal year 2011.

Mr. Brian O'Herlihy  
 Ms. Karen J. O'Neill and  
 Mr. John C. Grosjean  
 Karin and Kevin Paquin  
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 The Prudential Foundation  
 State Street Matching Gift Program  
 Verizon Foundation  
 Waters Corporation

#### In Memory Of...

David Lee Goldberg  
 Henry Kolm  
 George Lewis  
 Eric Menoyo  
 Hank Norwood  
 Paula Roberts  
 Jonathan Strong  
 Richard Thompson  
 Wilfred and Mildred Turenne  
 Richard Williams  
 John Wilson  
 John Wolbach

#### Grants

Arthur Ashley Williams Foundation  
 The Entrust Fund  
 The Helen G. Hauben Foundation  
 Metrowest Community Health Care  
 Foundation  
 National Park Service  
 Norcross Wildlife Foundation  
 Open Space Institute  
 Recreational Equipment Inc.  
 Sudbury Foundation

#### The Living Water Society

The Living Water Society is an honorary group of members and friends who have included SVT in their estate plans.

Anonymous (3)  
 Diana Abrashkin  
 Mrs. Elaine W. Beals  
 Mrs. Janet Caristo-Verrill  
 Carol H. Case  
 Richard and Lorraine Dinjian  
 Dr. Carol Englander  
 Ms. Betty Foley  
 Cile and Bill Hicks  
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 Rick and Louise Johnson  
 Ms. Ruth Kennedy Sudduth  
 Jill Phelps Kern and John Faricelli  
 Ms. Sally Linden  
 Mrs. Dorothy Long  
 Ms. Judith Markland and  
 Mr. William Saunders  
 Charles and Lois Morgan  
 The Stevenson Family  
 Charitable Trust  
 Mr. Karl Thober  
 Lawrence and Edna Tighe  
 Joy and Alfred Viola

#### Special Projects and Campaigns

##### \$10,000 and up

Anonymous (2)  
 Colin and Melody Anderson  
 Michael and Barbara Eisenson  
 Cile and Bill Hicks  
 Andi and Chris Jenny  
 Ms. Shalin Liu  
 Mr. David M. Solomon

##### \$2,500-\$9,999

Rick and Louise Johnson  
 Richard and Marian Thornton  
 Joy and Alfred Viola  
 Robert and Tona White

##### \$1,000-\$2,499

Anonymous (1)  
 Marylynn Gentry and  
 Christopher Riley  
 Jill Phelps Kern and John Faricelli  
 Mr. Bernard J. McHugh and  
 Ms. Frances H. Clark  
 David and Jaye Moore  
 Thomas Mullen and  
 Catherine Coleman  
 Edmund J. Walsh and Jane M. Walsh

##### \$250-\$999

Charles and Lois Morgan  
 David and Sandra Morgan  
 Mr. Dana A. Perry  
 Barbara Tabak and David Damiano

#### Bequest

Henry Kolm



Among the land protection projects completed in fiscal 2011, Sweetwilliam Farm conserved nearly 100 acres, which provided a link to over 2,000 acres of contiguous conservation land.

#### Matching

AMD  
 Aptima, Inc. Matching Gift Program  
 CA Technologies  
 Citizens Bank  
 ExxonMobil Foundation  
 FM Global Foundation  
 General Electric Foundation

Revenues	2011	2010	2009
Contributions and Grants	574,561	611,445	1,380,593
Membership	374,487	334,945	336,642
Land Transactions			49,749
Investment Income (Loss)	<u>1,073,221</u>	<u>696,248</u>	<u>(725,455)</u>
Unrealized Loss on Trade Land	(363,300)		
Other Income	<u>92,836</u>	<u>99,233</u>	<u>85,500</u>
<b>Total Revenues</b>	<b>1,751,805</b>	<b>1,741,861</b>	<b>1,127,029</b>

### Expenses

Land Acquisition	92,225	500	1,104,930
Other Land/River Protection	279,377	286,223	267,822
Stewardship	257,144	239,508	232,248
Education/Advocacy	70,624	89,122	65,532
Development/ Membership	<u>219,163</u>	<u>187,835</u>	<u>245,931</u>
Administration	<u>163,686</u>	<u>147,979</u>	<u>165,737</u>
<b>Total Expenses</b>	<b>1,082,219</b>	<b>951,167</b>	<b>2,082,200</b>

### Transfer of Mass Land Trust Assets

<b>Increase/(Decrease) in Net Assets</b>	<b><u>669,586</u></b>	<b><u>790,694</u></b>	<b><u>(955,171)</u></b>
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*Copies of the audited financial statements are available upon request.*

## TREASURER'S REPORT

SVT's financial year runs from July 1 to June 30. Thanks to continued strong financial support from our members and friends, the organization finished 2011 in good financial health.

The Financial Highlights consolidate results from the three major and distinct areas—operations, land transactions, and portfolio investment results. The following table breaks out and explains each area separately.

Financial Highlights Components	\$ amount in 000s	2011	2010
Aggregate Increase/(decrease) in Net Assets		669	791
1) Surplus/(deficit) from Operations		88	75
2) Land Transaction Activities		(129)	(4)
3) Investment Income plus gains/(losses)		670	660
4) Other: Bequests		40	60

**1) Operations**—This category includes total donations and revenue minus salaries, utilities, insurance, stewardship, administration, education and cost of fundraising. In fiscal 2011 there was an operating surplus of \$88 thousand. This was primarily the result of strong financial support combined with managing expenses to a less than planned level. In most years, SVT has just a small operating surplus.

**2) Land transaction activities**—This area includes funds raised in each year to preserve land, minus total cost of surveys, legal expense, land protection personnel costs and SVT's share of purchase cost of land parcels or conservation restrictions. This number will be very large in years when SVT is raising funds for a large land transaction, or it can be a significant deficit in years when the funds are paid out to complete a large transaction.

**3) Investment income plus changes in value**—This area includes primarily investment income and change in value of SVT portfolio investments.

**4) Bequests**—In 2011, one bequest, totaling \$40 thousand, was received and will be used for long-term land protection.

SVT will continue to manage its resources, along with member and supporter contributions, frugally and responsibly, while pursuing its mission to preserve and take care of land.

*Bruce Osterling*

**BENEFIT COMMITTEE**  
 Donna Appel  
 Andi Jenny  
 Iryna Priester (Chair)  
 Sonja Strong  
 Donna Watkins  
 Chris Wisniewski

**MEMBERSHIP AND OUTREACH COMMITTEE**  
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 Jamie Bemis (Chair)  
 Lauren Kaplan  
 Laura Spear  
 Betsy Stokey

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 Brian Clew  
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 Bruce Osterling (Chair)  
 David Richardson  
 Chris Riley  
 David Sette-Ducati  
 Ted York

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 Marylynn Gentry  
 Peter Martin  
 Deirdre Menoyo  
 David Moore  
 Richard Perkins  
 Stephen Richmond (Chair)  
 Tom Robinson  
 Betsy Stokey

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 Michael Robinson  
 Lydia Rogers  
 Tom Roose  
 Peter Scrzypczak  
 Kim Simpson  
 Sudbury Girl Scout Troop 77163  
 Leon Wardle  
 Peg Whelley

**PRESIDENT'S COUNCIL**  
 Colin Anderson  
 Whitney Beals  
 John & Molly Beard  
 Chris Clifford  
 Sherrill Cline  
 Catherine Colinvaux  
 Lucile Hicks  
 Rick Johnson  
 Paul Kaplan  
 Ruth Kennedy  
 Sudduth

Shalin Liu  
 Arthur Milliken  
 Kip Sluder  
 Howard Stevenson (Chair)  
 John Thomas  
 Stephen Winthrop  
 Marilyn Zacharis

**SVT STEWARDSHIP COMMITTEE**  
 Whitney Beals  
 William Coder  
 Michele Grzenda  
 Doug Johnson  
 Rick Johnson (Chair)  
 Robert Kamen  
 Fred King  
 Karin Paquin  
 Jeff Richards  
 Lydia Rogers  
 Emily Wheeler

**WOLBACH FACILITIES COMMITTEE**  
 Brian Clew  
 Richard Dinjian (Chair)  
 Arthur Milliken  
 Bruce Osterling