

SUDBURY VALLEY TRUSTEES

Annual Report

CONSERVATION, COLLABORATION, AND COMMUNITY SINCE 1953

2019



Conservation in Action

Dear SVT members,

At the outset of Fiscal 2019, we embarked on a new five-year strategic plan that charged us to accelerate the pace of land protection, stewardship, and engagement. To succeed, we devoted more time to helping our allies conserve and steward land, acting on the belief that we make a greater impact when we work with others. During the year, we protected almost 300 acres of vulnerable lands, we continued our efforts to steward our natural areas, and we enlisted people from across the region to participate in this work.

Land Protection Highlights

Horse Meadows Knoll, Harvard. SVT helped the Harvard Conservation Trust raise funds to purchase this 48-acre ecological gem. SVT now holds a conservation restriction (CR) on the property and will manage the trail that winds through this beautiful landscape.

Elizabeth Brook Knoll, Boxborough. A state grant enabled the Boxborough Conservation Trust to purchase this 15-acre property that abuts Horse Meadows Knoll. SVT helped with additional fundraising and now co-holds a CR with the Boxborough Conservation Commission.

Municipal Partners and CRs. When SVT is granted a CR on a municipal-owned property, we can ensure that important ecological features are protected forever. This year, the Town of Bedford granted us CRs on Pickman Meadow and the Daughters of St. Paul land, the Town of Sudbury finalized the CR we hold on Landham-Brook Marsh, and the Town of Berlin granted us a CR on the 75-acre Oberg Property on Mount Pisgah.



BioBlitz & Discovery Days. In late spring, SVT and our partners in Harvard, Littleton, and Boxborough led three Discovery Days where amateur naturalists learned how to identify wildlife by sight and sound. In June, we held a one-day BioBlitz, during which our volunteers cataloged 346 species on conservation lands in the three towns.



Smith Conservation Land, Littleton. With help from private donors, SVT purchased the 48 acres of this stunning property that are located in Littleton, while the Town of Harvard purchased the 12 acres on its side of the town line. The Littleton Conservation Trust holds a CR over the entire 60 acres.

Stewardship Highlights

Habitat Restoration. We quadrupled the size of the pollinator meadow at Wolbach Farm in Sudbury, and we continued to maintain our field habitats—including those at Greenways Reservation in Wayland and Cedar Hill in Northborough—where we foster native plant diversity and control invasive plants.

Leading a Collaboration. SVT is part of the SuAsCo Cisma (Cooperative Invasive Species Management Area) partnership that fights invasive species in the region. We place a priority on collaborating with others, so when SuAsCo Cisma needed a new sponsor organization, SVT stepped up to take on the role.

Nest Box Monitoring. The 58 nest boxes on our properties give cavity-nesting birds a safe place to build their nests. In 2019, our volunteer Nest Box Monitors counted 250 eggs and 94 fledglings.

Property Monitoring and CR Stewardship. As we do every year, SVT visited all of our 91 reservations and 85 conservation restrictions to make sure their ecological values are being maintained.

(continued on inside flap)

Conservation in Action (continued from front)

Outreach Highlights

Nature-Themed Programs. More than 1,000 people took part in an SVT program, walking our trails, searching the skies for birds, learning about pollinators, and painting scenic vistas.

Updated Trail Guide. With the help of volunteer writers, map makers, and photographers, we updated our popular trail guide with new trail descriptions, easier-to-read maps, and great wildlife photographs.

Advocacy. Together with OARS (the regional organization that advocates for the Sudbury, Assabet, and Concord Rivers), we hosted our 3rd annual legislative breakfast that brings together

state legislators and local conservationists for productive conversations. SVT also assisted the Town of Berlin's successful effort to pass the Community Preservation Act to raise funds for conservation projects.

This work is made possible by the support of our more than 2,900 members and 200 volunteers and with the contributions and efforts of our many partners. Thank you.

Andrew Magee
President

Lisa Vernegaard
Executive Director

Our Mission

Sudbury Valley Trustees works to protect natural areas and farmland for wildlife and people in the 36 communities that surround the Sudbury, Assabet, and Concord Rivers.

About Us

Founded in 1953, Sudbury Valley Trustees is supported today by a membership of more than 2,900 households and businesses. Working in collaboration with landowners, local conservation commissions, and government agencies, SVT pursues its mission through land acquisition, stewardship, advocacy, and education.

As of the conclusion of FY19, SVT owns, through gift and purchase, more than 2,400 acres in 19 communities. In addition, SVT holds conservation restrictions on more than 2,830 acres and has been instrumental in preserving several thousand acres now protected by public agencies. Altogether, SVT is responsible for the protection and care of more than 5,230 acres on 176 properties, which include wetlands, sensitive habitats, and more than 65 miles of trails.

Sudbury Valley Trustees, 18 Wolbach Road, Sudbury, MA 01776
Tel: 978-443-5588 • Fax: 978-443-2333 • svt@svtweb.org • www.svtweb.org

SVT's Region



Board of Directors For FY19

PRESIDENT
Andrew Magee, Acton

VICE PRESIDENT
Karin Paquin, Marlborough

TREASURER
Bruce Osterling, Sudbury

CLERK
Peter Martin, Northborough

ASSISTANT CLERK
Michael Cohen, Maynard

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Lisa Vernegaard, Maynard

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Brian Clew, Framingham
Sherrill Cline, Sudbury
Steven Correia, Wayland
Molly Cutler, Harvard
Rebecca Cutting, Sudbury
Sean Fair, Wayland
Richard Forman, Concord
Robert Kamen, Sudbury
Ruth Kennedy Sudduth, Stow
John Mastrobattista, Framingham
Richard Perkins, Stow
Lisa Schimmel, Wayland

Staff For FY19

Lisa Vernegaard, Executive Director
Amy Bevan, Development Associate
Christa Collins, Director of Land Protection
Ashley Davies, Senior Land Protection Specialist
Laura Mattei, Director of Stewardship
Jonathan Moore, Community Conservation Specialist
Kristin O'Brien, Land Steward
Debbie Pullen, Development & Engagement Coordinator

Michael Sanders, Director of Membership
Deborah Sargent, Communications & Office Manager
Dan Stimson, Assistant Director of Stewardship
Kate Tyrrell, Business Manager
Chris Wilson, Wolbach Caretaker

AMERICORPS MEMBERS
Sara Amish
Trevor Nelson

ANNUAL REPORT DESIGN
Jason Fairchild, Truesdale Group

Financial Overview

SVT is grateful for the generosity of its members who provided 59% of our operating revenue. These contributions, as well as tight control of expenses, resulted in a surplus of \$76,000 for Fiscal 2019.

In addition to this support of our behind-the-scenes work, over \$220,000 was raised for land protection projects and over \$100,000 for our stewardship endowments. Through your support, as well as through contributions from foundations and grants, SVT was able to preserve 272 acres on eight properties in Fiscal 2019, and we assisted on the protection of an additional 23 acres.

Our finance committee conservatively managed our investments, resulting in a \$644,000 or 6.05% return on our investments.

SVT will continue to manage its resources and contributions responsibly while pursuing its mission to preserve and steward land. We welcome your financial questions and comments.

FY19 Financial Summary

(in thousands of dollars)

Revenue

Member Support	\$809
Grants	71
Corporate	16
Fundraising Events	129
Earned Income	70
Endowment Draw	226
Other	62
Total Revenue	<u>1,383</u>

Expenses

Personnel	891
Non-Personnel	416
Total Expenses	<u>1,307</u>

Net Income

\$76

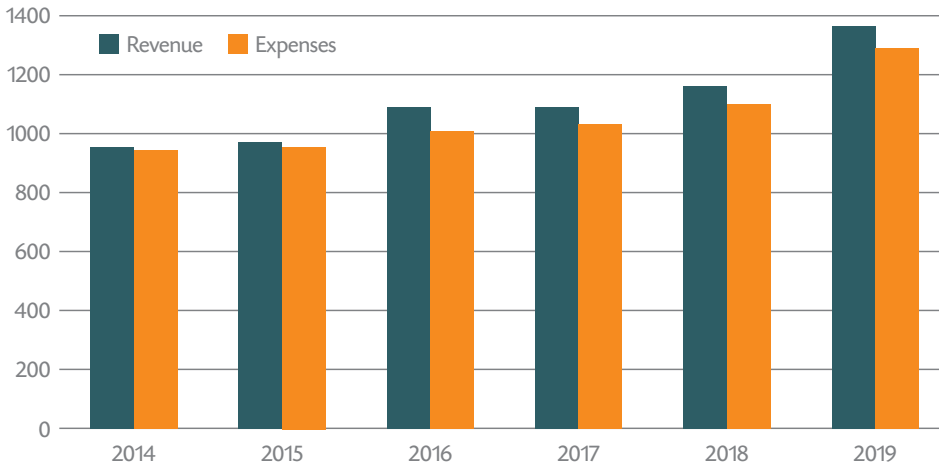
FY19 Investments, Market Value

(in thousands of dollars)

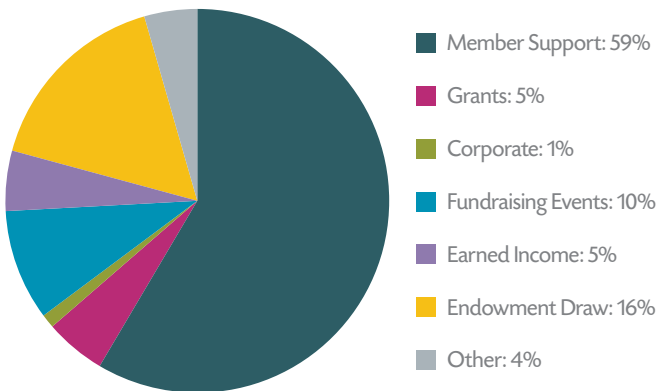
Beginning Balance	\$10,865
Contributions/Other	531
Transfers/Use of Funds	(782)
Unrealized/Realized Gains	644
Total Investments	<u>\$11,258</u>

Copies of the audited financial statements are available upon request.

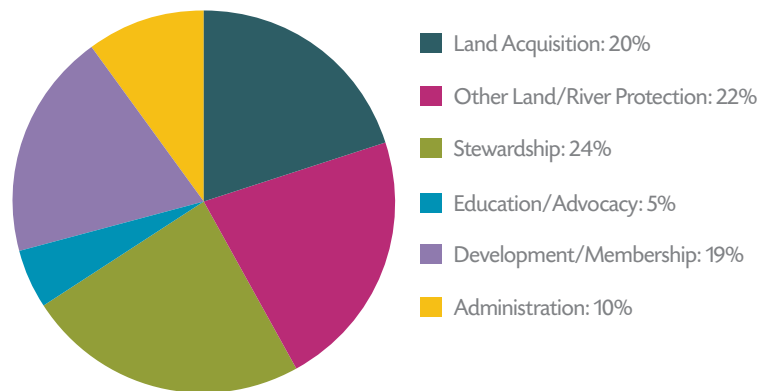
Annual Operating Revenue and Expenses, 2014–2019



Sources of Operating Revenue



Expenses (From IRS Form 990)



Committee Members For FY19

Benefit

Helen Crary
Margaret Estes
Ellie Johnson
Leora Mallach
Joan Pinkul
Sonja Strong

Bruce Osterling, *Chair*
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Lisa Schimmel
David Sette-Ducati
Ross Trimby
Ted York

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Karin Paquin
Dick Perkins

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Marylynn Gentry
Ruth Kennedy
Sudduth
Andy Magee
Peter Martin
David Moore
Dick Perkins
Greg D. Peterson
Morgan Wilson

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Neela de Zoysa
Sean Fair
John Mastrobattista,
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Bill Fadden
Richard Forman
Beth Gula
Michele Grzenda
Tom McGowan
Karin Paquin, *Chair*

Wolbach Facilities

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Richard Dinjian
Bob May
Bruce Osterling
William Sterling, *Chair*

Finance

Jay Atlas
Colin Anderson
Paul Bakstran
Brian Clew
Bob May

Our Donors

We are grateful for the generosity of our more than 2,900 members, foundations, business sponsors, and in-kind contributors. Listed below are those who made contributions between July 1, 2018, and June 30, 2019. Due to space limitations, we are only able to list donors of \$250 and above. We extend sincere thanks to all of our contributors.



Understanding Our Lands. To properly care for lands that we own, we must understand the species that live on them. In Fiscal 2019, we initiated a botanical inventory at the Smith Conservation Land in Littleton, and so far we have counted more than 250 species of trees, shrubs, and other plants.

Annual Fund

\$20,000 and Up

Anonymous
Robert Kamen and Trudi Veldman
Madeline Leone and John Mastrobattista
Litowitz Foundation Inc.
Susan Litowitz
Jim and Lisa Valone

\$10,000 to \$19,999

Anonymous (5)
Donna and Art Appel
Helen G. Hauben Foundation
Cile and Bill Hicks
Donald Hindley
Andi and Chris Jenny
Margaret F. Norwood
The Stevenson Family Charitable Trust

\$5,000 to \$9,999

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Colin and Melody Anderson
Molly and John Beard
Jennifer Bemis
The Boston Foundation
Brian and Alison Clew
Sherri Cline and Thomas McGowan
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Chris and Molly Cutler
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Chris Green
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Andre and Christine Navez
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Bill and Karen Sample
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\$2,500 to \$4,999

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Jonathan Wicks and Meredith Becker
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\$1,000 to \$2,499

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Sandra Buscemi and Lorrie Norrington
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 Paula Foley
 Bruce and Cary Forman
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 Michael and Mary Garfield
 James Georges

Ilene Gipson and Henry Keutmann
 C. Peter R. and Nancy Lee Gossels
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 Garth and Lindsay Greimann
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 Bill McCarthy
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 Barbara Melnick
 Bernard and Elizabeth Meyer
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 David R. Morgan
 L. E. Morris and Betty Salzberg
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 Roger Nuss and Kim Wilson
 John and Peg Nystrom
 Lydia Pastuszek and Brian Monahan
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 Brett Peruzzi and Robyn Gold
 Susan and David Pettit
 David Pierson
 Susan Pope
 Barbara and Fred Pryor
 Carol and Richard Rader

Emil and Marty Ragones
 Erick Rawlings
 Marianne Reardon
 William M. Rhodes
 Steve Richmond and Julie Weinstein
 Charlie and Emily Russo
 Jim and Roseanne Saalfeld
 Peter and Sara Salvador
 Robert and Shari Sanford
 Stephen Schrodol and Phoebe Yager
 Jimmy and Heidi Seaborg
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 Paul and Terry Simeone
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 Hank and Mary Anne Smith
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 Kathryn Spellman
 Colin and Virginia Steel
 Martha Steenstrup
 Carolyn and Eric Stein
 Donald Stein and Lane Williamson
 Miriam L. W. Stoddard
 Tom and Jackie Stone
 Sonja Strong
 Janet L. Testa
 Karen and Michael Tichnor
 The Tofias Family
 Perry and Robin Traquina
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 Marc and Nadia Ullman
 Daniel Vellom
 Rob and Lisa Venne
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 Norval Leon Wardle
 Cliff and Diane White
 Michael T. Wilson
 Rebecca Winborn and Gib Metcalf
 Allan Wyatt and Nina Marlowe
 Cal Yapp
 Theodore York
 Philip Zamore and Catherine Colinvaux

Project Support

\$20,000 and Up

Cile and Bill Hicks
 Donald Hindley
 Susan Litowitz

\$10,000 to \$19,999

Anonymous
 Marshall and Nikki Bartlett
 Carolyn and Will Fox
 The Helen G. Hauben Foundation

\$5,000 to \$9,999

John Coolidge and Anne Richards
 Shalin Liu
 Bill and Karen Sample

\$2,500 to \$4,999

Mary Antes

\$1,000 to \$2,499

Anonymous (3)
 Paul and Annette Bakstran
 Charles and Sarah Cabot
 David and Susan Clark
 Rebecca and John Cutting
 Marylynn Gentry and Christopher Riley
 John Harder
 Thomas Mullen and Catherine Coleman
 The Murphy Family
 Barbara and Eric Sheffels
 Susan Primm Thel
 David Witherbee



Building Trails. Volunteers were key to our ability to open trails at Horse Meadows Knoll in Harvard, Wayside Forest in Framingham, Woodhaven Farm in Carlisle, and Great Oak Farm and the Oberg Property (Mount Pisgah) in Berlin.



Bark Rangers. Working with the Town of Weston, we recruited volunteer "Bark Rangers" to walk local trails, engage with dog walkers, and offer friendly guidance about proper dog etiquette.

\$500 to \$999

Robert and Rita Anderson
Heidi and Jaime Caro
Chris and Molly Cutler
Joseph Holmes
Yutaka and Sally Ishizaka
Ray Lyons
William Shaw and Paul Silva
Karen Yeowell and Mark O'Connell

\$250 to \$499

Anonymous (2)
Samuel and Holly Bell
Sarah Booth
Matt and Ann Cairns
Hilary Ely
Steven and Andrea Frank
Richard and Jane Lyons
Karin and Kevin Paquin
Robert Tosi and Jo-Ann Dery

Grants

Bruce J. Anderson Foundation
Bafflin Foundation
The Burroughs Charitable Foundation
Covered Bridge Neighborhood Association
Fields Pond Foundation
The Helen G. Hauben Foundation
Merrimack Conservation Partnership
Middlesex Savings Bank
National Park Service
Gordon and Marjorie Osborne Foundation
Sudbury Foundation
William P. Wharton Trust

Matching Gifts

AbbVie
Bank of America Matching Gifts
Benevity Community Impact Fund
Boston Scientific Employee Giving
Dell Employee Engagement Fund
Dell Giving
ExxonMobil Foundation, Inc.
FM Global Foundation
General Electric Foundation
Goldman, Sachs & Co. Matching Gift Program
Google Matching Gifts Program

International Business Machines
Macy's Foundation
National Grid
Network For Good
NYSE Euronext Foundation
Pfizer Inc.
Qualcomm Matching Gift Program
Saint-Gobain Corporation
State Street Matching Gift Program
Travelers Community Connections
Tufts Health Plan Foundation
Walmart Foundation
Waters Corporation

Pro Bono/In-Kind Gifts

\$250 and up

Colin and Melody Anderson
ata Cycles
Paul Bakstran
Beveridge & Diamond
Bowditch & Dewey
Christa and Jeff Collins
Jeff Collins, Mass Audubon
Chris and Molly Cutler
Neela de Zoysa
Tenuta di Spannocchia
Joyce Dwyer
Eliason Law Office
Scott and Margaret Estes
Richard Forman
Sophie Glasser
The Hancock Inn
John Harper and Ellen Tohn
Nele Kaps
Richard Kramer
REI
Sheraton Framingham
Total Wine & More Natick
The Trustees of Reservations

Bequests

Edith H. Overly

Gifts in Memorium

Jane P. Burke
John B. Churchill
Evelyn Hopkins
Henry A. Kirsche
Richard Kurth
Robert McNitt
Charlotte M. Rix
Stephen Winthrop

Life Members

Chosen by the Board of Directors in acknowledgment of extraordinary contributions to SVT's work.

Anonymous (4)
Bruce and Marian Anderson
Colin and Melody Anderson
Robert and Rita Anderson
Donna and Art Appel
Frederick and Janet Ballou
Molly and John Beard
Billie Bentzen
Steen and Carla Bentzen
Torsten Bentzen
Forrest Berkley and Marcie Tyre
Mr. and Mrs. William H. Catlin, Jr.
Brian and Alison Clew
Chris and Keena Clifford
Gary L. Countryman
Marie T. Creedan
Stuart and Dana Davies
Brett Devine
Carol Devine McInnes

Mary Donald
Michael and Barbara Eisenson
Beverly Emmons
Scott Emmons
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George and Carol Gay
Allen Glick
Marian and William Harman
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Candace Herene
Cile and Bill Hicks
Dorothy and Michael Hostage
Andi and Chris Jenny
Robert Kamen and Trudi Veldman
Ruth Kennedy Sudduth
Judy King
Marilyn Kucharski
William and Michele Landes
Madeline Leone and John Mastrobattista
Edward Marram and Karen Carpenter
Richard Mayo and Sara Page Mayo
Charles H. McColough
Edward J. McTighe
David and Jaye Moore
Andre and Christine Navez
Shirley Pollitt
Ann and Bill Rawstron
Angelo G. Rocco and Celia Rocco
Gregory and Claire Rocco
Charles and Martha Schmidt
Nancy Shepherd
Chester and Evelyn Small
David M. Solomon
Charles E. Stearns
Jonathan Stearns
The Stevenson Family Charitable Trust
Jean Claude and Carole Sureau
Jim and Lisa Valone
M. Jane Williamson
Fran and Debra Zarette

Living Water Society

Members and friends who have included SVT in their estate plans

Anonymous (3)
Diana Abrashkin
Colin and Melody Anderson
Nancy Burke and Donald Burn
Laurel J. Carpenter
Carol H. Case
Sherri Cline and Thomas McGowan
Susan Copeland
Laura Diamond and Carolyn McDonald
Richard and Lorraine Dinjian
Carol Engler
Betty Foley
George and Carol Gay
Laurence Grossman and Rita Gibes Grossman
Cile and Bill Hicks
Donald Hindley
Andi and Chris Jenny
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Rick and Louise Johnson
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Sally Linden
Judith Markland and William Saunders
Ron McAdow and Betsy Stokey
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Charles and Lois Morgan
Andre and Christine Navez
Philip and Donna Schaefer
The Stevenson Family Charitable Trust
Elizabeth Tepper
Karl Thober
Jim and Lisa Valone
Lisa Vernegaard
Joy and Alfred Viola
M. Jane Williamson

Our Volunteers

SVT receives much-needed support from more than 200 volunteers each year. Many of the volunteers who serve on our Board of Directors and Committees (listed elsewhere in this report) also help out in countless other ways. In addition to our Board and Committee members, the following volunteers also recorded at least 20 hours of work in support of SVT projects in FY19. We are grateful to them and to all our volunteers for their commitment to conservation.

Ivini Barbosa	Lynn Joiner	Dany Pelletier
John Beard	Marilyn Kelber	Joan Pinkul
Nancy Burke	Susan Kurys	Nitika Purohit
Ellen Byrne	Michelle Lemettas	Patrick Rockwell
Luke Ciambone	Susan Litowitz	Rob St. Germain
Brad Conant	Thomas Martin	Marc Sevigny
Wendy Copes	Tom Mead	Patricia Shesgreen
Kirklan Doherty	Chris Menge	Kimball Simpson
Judith Eneguess	Robin Merrill	Chris Swain
Marjorie Fisher	Minuteman Career and Technical High School	Joe Tyrrell
Carole Hohl	Lawrence Morris	Jan Vanselow
Jane Joiner	Richard Morse	Michael Welles
	Robert Pease	Mike Zaborowski

We apologize for any errors or omissions and hope you will notify us of them.