



2009 Annual Report
Westmoreland Land Trust

WESTMORELAND LAND TRUST Second Year Accomplishments, 2009

The young Westmoreland Land Trust held five board meetings during 2009, a number of committee meetings, and a public “Ground-saving” event to announce its first property acquisitions – four properties totaling more than 105 acres of open space in four communities in Westmoreland County.

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 second-year administrative expenses.

PROPERTY ACQUISITIONS

The Westmoreland Land Trust made its first property acquisitions this fall and early winter, preserving more than 105 acres of open space in four Westmoreland County 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; and
- 3.5 acres in the City of Greensburg, near Cabin Hill Drive.

Two of the properties preserved were recommended at public meetings the trust held throughout the county in the summer of 2008 to solicit public input.

ORGANIZATIONAL STRUCTURE

The IRS notified us on January 15, 2009, that it approved our nonprofit application, **officially designating us as a 501(c)(3)**, effective January 7, 2008.

This nonprofit status paves the way for us to talk to foundations and other potential givers about providing support for the trust.

STEWARDSHIP

Property ownership brings with it the responsibility of **stewardship** and our Stewardship Committee began meeting this fall to discuss the specifics of how this responsibility will be managed, from developing policies and land-management plans to routine property monitoring.

COMMUNICATIONS AND OUTREACH

Our Communications and Outreach Committee created a public “**Ground-saving Event**” to announce the trust’s first four property acquisitions.

More than 60 people, including representatives of several news media organizations, attended this event held on Thursday, October 1, at 1:30 p.m., at the Otto and Magdalene Ackermann Nature Preserve on Ardara Road in North Huntingdon Township.

The trust issued several **news releases**, and members of the media attended our meetings and interviewed our officers during the year.

The Latrobe Bulletin, Tribune-Review, Murrysville Star, and Penn-Franklin/Delmont Salem/Penn Trafford News all ran **articles and/or editorials** on the trust during the year, some more than once.

Our Vice Chair Bruce Corna created a **Facebook page** for the trust as another way to get the organization known.

FUNDRAISING

Our Development Committee began its fundraising work with a **campaign targeted to board members**, and obtained a **challenge grant** that would match, dollar-for-dollar, every dollar above \$50 contributed by an individual board member.

A total of \$2,200 was donated by 16 board members. The anonymous challenge donor maximized the match at \$2,500, for a total of **\$4,700**.

Our Development Committee also began making arrangements with an expert, Megan Hughes, program manager for The Environmental Finance Center of the University of Maryland, to **talk with us about fundraising**.

Ms. Hughes is scheduled to make this presentation on January 22, and the trust is opening the event, free-of-charge, to other, like-minded nonprofits.

The Westmoreland Agricultural Land Preservation Board and the Community Foundation of Westmoreland County are providing additional support for this event.

FISCAL ADMINISTRATION

We met with an independent CPA and asked him to review the need for an audit of the trust’s first year.

Regis Tomsey, CPA, stated that his professional assessment was that **no audit was needed for the trust’s operations in the year 2008, and that a financial review is sufficient at this time**.

The trust board voted to ask Mr. Tomsey to conduct this financial review, a copy of which is attached.

It states that our financial statements conformed with generally accepted accounting principles, and no modifications were recommended.

LEGAL/LIABILITY CONCERNS

Thanks to support from the county, we were able to obtain **Directors and Officers insurance** for our board through its insurance broker.

A **backup system** was put in place for the trust's electronic files.

ADMINISTRATIVE

The trust board voted to amend its bylaws to **allow proxy voting** for each member at two board meetings per year.

The need for this amendment was spurred by the schedules of the two legislators who serve on our board.

The trust became a member of both PALTA (the Pennsylvania Land Trust Association) and LTA (the (national) Land Trust Alliance).

A comprehensive records system for property-related information is in the initial discussion phase. Establishing such a system will serve several goals, including helping the trust achieve national certification and/or accreditation.

BOARD DEVELOPMENT

We hosted a board meeting where Sara Giordano and Paul Rogers of the Insite Group Inc., which did Phase I Environmental Assessments on the Trust's first four property acquisitions, presented information the type of things these assessments look for, and some details of what they saw on the specific properties.

Bruce Corna, Alex Graziani, Karen Jurkovic, Lewis Lobdell, John Lohr, Vince Quatrini, and Lisa Smith – each of whom completed an initial, two-year term on the board as of December 31, 2009 – were reappointed to full, three-year terms, running from January 2010 through December 2012.

Westmoreland Land Trust
Income and Expense Statement
1/1/2009 through 12/31/2009

INCOME

Donations 20,200.00

TOTAL INCOME

20,200.00

EXPENSES

General Expenses 441.78
(Copies, Postage, Meeting Refreshments, Office Supplies)
Meeting Advertisements 92.00
Charitable Orgn Registration 15.00
Dues 360.00
E & O Insurance 879.00
Appraisal Fees 8,800.00
Legal Fees 368.50
Audit Review 250.00
Signs 160.00
Posters 95.00
Ground-saving Expenses 156.60
Carpet Cleaning 87.50

TOTAL EXPENSES

11,705.38

NET INCOME (LOSS)

8,494.62

Westmoreland Land Trust
Cash Flow Statement
1/1/2009 through 12/31/2009

2009 BEGINNING BALANCE		\$ 6,593.27
INFLOWS		
Donations		\$ 20,200.00
TOTAL INFLOWS		\$ 20,200.00
OUTFLOWS		
General Expenses (Copies, Postage, Meeting Refreshments, Office Supplies)		441.78
Meeting Advertisements		92.00
Charitable Orgn Registration		15.00
Dues		360.00
E & O Insurance		879.00
Appraisal Fees		8,800.00
Legal Fees		368.50
Audit Review		250.00
Signs		160.00
Posters		95.00
Ground-saving Expenses		156.60
Carpet Cleaning		87.50
TOTAL OUTFLOWS		\$ 11,705.38
OVERALL TOTAL		\$ 8,494.62
2009 ENDING BALANCE		\$ 15,087.89

Westmoreland Land Trust
Balance Sheet
12/31/2009

CURRENT ASSETS:	
Cash and Bank Accounts	15,087.89
TOTAL	15,087.89
 LONG-TERM ASSETS:	
None	0
TOTAL ASSETS	15,087.89
 SHORT-TERM LIABILITIES	
None	0
 LONG-TERM LIABILITIES	
None	0
EQUITY	15,087.89
TOTAL LIABILITIES & EQUITY	15,087.89

2010 Objectives

- Acquire more properties
- Establish a stewardship protocol
- Raise funds
- Develop an organizational identity