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2019 Annual Report Kim Good, Board Chair

Writing this 2019 report ten months after the end of the year is one thing but writing it six months into a global pandemic seems surreal. Yet, while so much has changed around us, much has also stayed the same and our conservation and stewardship work continues.

Last year was a great year for conservation in Mountain View County and surrounding areas.

With the excellent guidance of our Conservation Coordinator, Owen Rodger, Legacy registered two new conservation easements (CEs) totaling nearly 300 acres and started work on four more ensuring the conservation of another 1000 acres.

Each of these six properties provides great benefits locally and beyond. All of them are part of a river or creek system that helps to filter and clean surface water, provides excellent wildlife habitat and offers beautiful views. They all also have some type of agriculture that contributes to local food production.

In addition to our conservation easement projects, Legacy's on-the-ground 2019 stewardship activities included:

- Our first *Buttercup Blitz* on Owl Ridge CE to help control invasive Tall Buttercup
- The creation of the Legacy/Rotary Mountain Bluebird Trail with 30 nest boxes

- Range and riparian health assessments on each CE property during our annual monitoring visits

One of Legacy's mandates is to share information and conversation about conservation and stewardship actions. In 2019 we:

- Visited landowners on the Red Deer River as part of our *Water Quality & You* program with the assistance of a summer student and volunteers
- Invited photographers and Legacy supporters to celebrate our 2020 calendar with a special calendar launch
- Held an *Estate & Succession Planning* workshop for landowners interested in incorporating conservation into their long-term plans, and
- Staffed booths at *Ranching Opportunities* and *National Indigenous Peoples' Day* in Olds, *Neighbours' Day* in Sundre, and several farmers' markets.

It is so important to engage people with natural landscapes, to meet them in a place where they feel a part of the outdoors and all it provides.

In this light Legacy partnered with Dr. Dorothy Hill, Associate Professor in the Department of Biology at Mount Royal University. Her undergrad students had the opportunity to work on real-world conservation challenges by developing weed management and species survey plans.

We also introduced our first *Paint, Pen & Pixels* program designed to introduce artists, writers and photographers to the beauty and importance of permanently conserved land and invite them to be inspired by these places. Legacy members Nan and Dennis McKernan spearheaded this special event.

None of this could happen without our Circle of Friends and other supporters.

Your contributions of time, funds and expertise will ensure our natural world continues to support wildlife, flowing water, clean air, beautiful scenery and, in turn, the people who live here.

We invite you to continue this journey with us—please feel free to reach out, roll up your sleeves, share a post, ask a question, or share an idea. *Conservation* and *conversation* are similar words and we would love to engage in either with you.



Josh McCartney

Sincerely,
Kim Good
Board Chair

**Communications Committee
2019 Annual Report
Sally Banks, Chair**

Communication is at the heart of Legacy's work. It's how we explain the importance of conservation, gain support from landowners and the public, find volunteers, and raise funds to deliver and expand our programs.

In short, communication touches almost everything we do.

While the Committee may plan specific programs, the overall work—and successful outcomes—relies on contributions by board members, staff and volunteers.

Some activities from 2019:

- Produced the monthly newsletter for Legacy's Circle of Friends
- Posted on social media (Facebook and Instagram)
- Published the 2020 calendar. Special thanks to Mountain View Power (Olds Institute) and Waste Connections of Canada for their generous support in the production of the calendar.
- Organized calendar launch and sales
- Developed *Giving Tuesday* Fundraising Campaign
- Created framework and plans for website redesign (to launch later in 2020)
- Wrote and edited documents for internal and external publication

The committee welcomes new members. If you like to write or edit, take photos, create graphics or are social media savvy please consider joining us.



Marilyn Phillips

Conservation Committee
2019 Annual Report
Terry Antoniuk, Chair
Owen Rodger, Conservation Coordinator

The Conservation Committee was established in 2019 consisting of five board members. The Conservation Coordinator provide support to the committee.

Role

The Conservation Committee advises on all matters related to conservation planning, conservation easements (CEs), and other land protection and stewardship initiatives. This includes responsibility for developing policy and guidance materials for securing and managing CEs, and reviewing and making recommendations on CE grant applications.

Activities

The committee's main focus was on reviewing and making recommendations on proposed, pending and ongoing CEs. Legacy's mandate is to "help communities conserve land that matters... forever".

Legacy works with private landowners and funders to select, secure, and manage conservation properties in Mountain View County and surrounding municipalities. Legacy now manages 6 Conservation Easements representing 1352 acres (547 ha).

During the last year Legacy:

- Received funding from the Alberta Land Trust Grant Program (ALTGP) for 3 new CEs.
- Submitted applications to ALTGP for 4 potential CEs.
- Finalized 1 CE with landowners.
- Identified 3 new potential CE opportunities, some through Legacy's *Water Quality and You* program in the Red Deer River Watershed.
- Completed monitoring on 5 Conservation Easements.
- Working to finalize 8 additional CEs.

Property Selection and Prioritization Guide

The committee also began development of a *Property Selection and Prioritization Guide*. Because Legacy's staffing and funding resources are limited, the guide is intended to provide a clearly defined process to ensure that selected properties fit Legacy's mandate and optimize the use of available resources.

The guide will ultimately consider both ecological (e.g., biodiversity) and cultural (e.g., agricultural and historical) conservation values and be consistent with the factors considered by existing and potential funders.

A partial draft focusing on ecological conservation values was completed in 2019. Legacy's Conservation Coordinator used this draft on a trial basis to existing and proposed conservation easements. This trial will identify areas that require clarification or revision. Cultural conservation values will be included in the guide over the next year.

Fundraising Committee
2019 Annual Report
Sue de Caen, Chair

The Fundraising Committee plans, coordinates and implements all the Society's fundraising activities. It works closely with the Conservation Coordinator to complete grant applications, establish community connections and research funding opportunities.

In 2019 we received grants from:

- Alberta Conservation Association (ACA): A grant to showcase the importance of pollinators to the community.
- Alberta Land Trust Grant Program (ALTGP): Three grants to help cover costs associated with establishing and maintaining conservation easements.

We also work closely with the Communications Committee. Its dedication and creativity helped make the 2019 Giving Tuesday campaign a success. We raised more than \$5,700 toward the expansion of Legacy's Mountain Bluebird Trail.)

Legacy is expanding its reach to the philanthropic community through the Calgary Foundation's Community Knowledge Centre, Canada Helps and Benevity. The more we showcase our achievements, the more likely we are to connect with donors who support our work for conservation.



Sally Banks

Governance
2019 Annual Report
George Green, Chair

Legacy, like any organization, requires governance in the form of defined processes and a structure to guide planning, decision-making, accountability and control.

Good governance optimizes the use of scarce resources while maintaining the confidence of donors, volunteers and the community.

Legacy follows the *Canadian Land Trust Standards and Practices* which set out the ethical and technical guidelines for the responsible operation of a land trust.

The Governance Committee is currently reviewing the new 2019 edition to ensure that Legacy's policies conform to the most recent requirements.



Julie Birch

Government Relations
2019 Annual Report
Tony Martens, Chair

The Government Relations Committee is a new committee created to assist Legacy stay up to date on and responding to government legislation, regulations, policies and guidelines that affect conservation and stewardship on private landscapes. These areas include charities, charitable giving, non-profit societies, federal/provincial/municipal conservation goals and initiatives.

The committee's Policy / Strategy was reviewed by the Executive Committee in 2019 and will now go to the Board for final review and approval.

Treasurer
2019 Annual Report
Larry Wright, Chair

Legacy's work is made possible through the funds we gratefully receive from governments, foundations, community groups and individuals. Legacy's largest operational supporter in 2019 was Mountain View County, as well as generous individual donors. Our largest project supporter has been the Alberta Land Trust Grant Program (ALTGP), funding all Legacy's conservation easements to date.

Legacy's individual giving program increased in 2019 through a regular monthly donor and a successful Giving Tuesday Campaign that included a donor matching program. Legacy also received its first gift of stocks from a very generous donor; these funds have been set aside in an internally restricted fund. These funds could provide seed or matching money for projects that do not have obvious funders such as conservation easements for agriculture, heritage-related projects, or stewardship activities.

One thing that may stand out when looking at Legacy's (or any land trust's) financials is that we tend to show fairly good-size numbers as deferred contributions and in restricted funds.

Deferred funds refer to donated funds that have been raised for a specific active project that will carry on past the end of the year.

Restricted funds are those that have a specific purpose and can only be accessed when all requirements are met. *Internally restricted* are those funds that the board has decided will be "saved" for a future need they know is coming. *Externally restricted* are those funds for which the donor or grantor has outlined specific requirements.

For example, in both cases stewardship endowments fit the restricted fund description. When Legacy does a conservation easement our policy requires that there be funds sufficient to ensure our responsibilities, as described in the conservation easement, can be met. Our main conservation easement grantor to date also provides stewardship funds that must be accounted for and used only for the projects they fund.

One may note that at the end of 2019 our Statement of Revenue and Expenses is a negative number. There are a number of reasons this could happen. In 2019 it was the result of increased costs related to project monitoring/reporting. Internal processes to improve efficiency and a review of current day rate (our costing equation for grant applications) are planned for the coming year. The unrestricted net assets Type to enter text remained positive with known additions being made in 2020.

Legacy's important fundraising task in the near future is to raise unrestricted dollars to support the project work and increase community programming.



Alicia Strelkov