

From the Open Space Institute's Leadership

In 2012, the Open Space Institute's land protection efforts ticked past the 2 million acre mark. 40 years ago, when a concerned group of conservationists gathered to pioneer our first acquisitions, this milestone seemed a long way off. In examining the landscapes we have protected and all we have achieved, we realize that our flexibility and responsiveness have been our best attributes.

Whether acquiring the lands that comprise some of our most treasured parks, crafting easements that help families hold on to their farms or making loans and grants that ensure large forests remain intact and undeveloped, OSI is getting the job of conservation done. Acre by acre, OSI has grown in impact and prominence.

In an ever-changing world – economically, politically, and climatically – any effort to achieve meaningful conservation results requires continuous examination and innovation. Two million acres is a strong start but it is not nearly enough. In an era of scant resources and new challenges, it is imperative that we focus on the most critical lands. OSI's strength and our breadth enable us to take on these hard questions. Where are the top needs? What are the stressors? What are the opportunities?

As you will read in our Annual Report, OSI is using its experience to lead the conservation field in planning and in practice. Today, our core programs encompass direct land conservation, conservation capital and research, advocacy and funding for parks and support of



community-based environmental groups. With your support, we accomplished a great deal in each of these efforts in 2012.

Environmentalists, historians and outdoor enthusiasts from across New York State lauded OSI for our purchase of the historic 295-acre Marion River Carry property in the central Adirondack Park, an essential link in one of the Adirondack's most well-traveled water recreation routes. In the

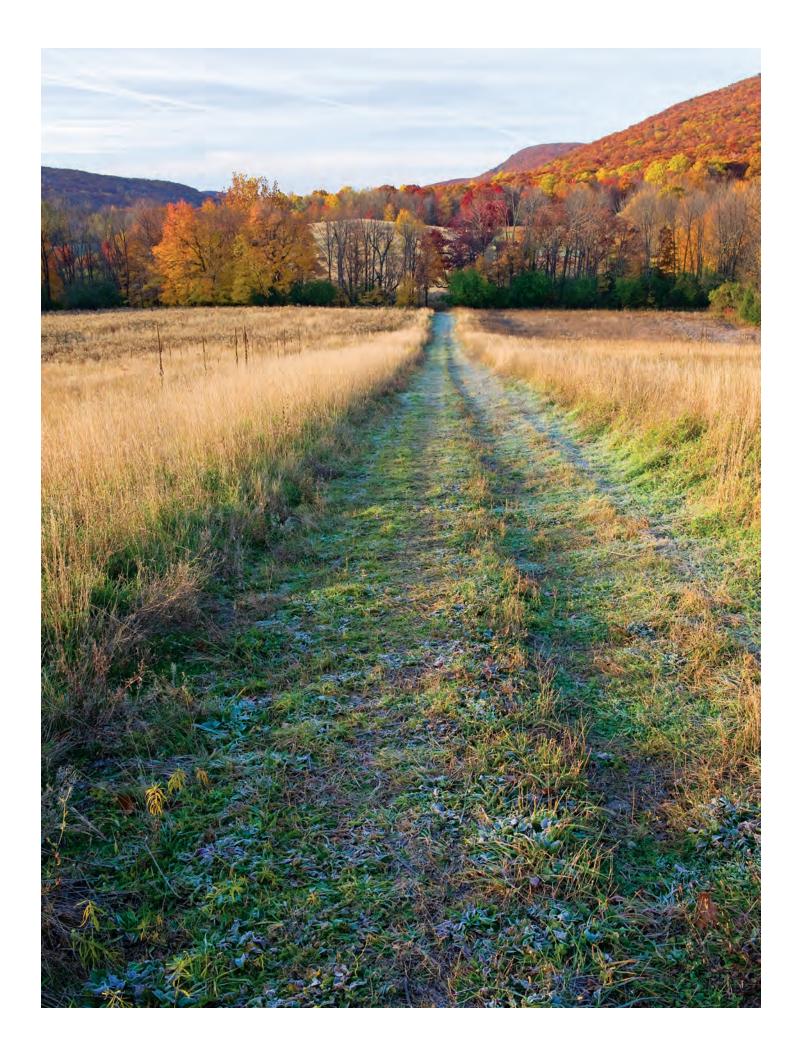
face of climate change, OSI's new Resilient Landscapes Initiative is shaping conservation priorities across 13 states, using emerging science to identify strongholds for nature long into the future. Further, we are providing guidance to land trusts that seek to synthesize the scientific information and translate it into results on the ground. The Citizen Action Program, one of our oldest efforts, is working with community-based groups to help them bring the conservation ethic to people's neighborhoods and to their tables.

We will continue to use every tool in our arsenal to protect important and threatened land. And we will continue to draw from the very best science and innovate new conservation tools to ensure we preserve our treasured resources, sustain local economies, and maximize philanthropic investments.

Thank you for your support and partnership. Together, we shape land conservation.

John H. Adams

Kim Elliman President & CEO





Saving the most important lands in perpetuity—a concept central to the conservation movement—is now taking on new meaning with the introduction of resiliency science.

Standing the Test of Time

Science-guided land investments protect biodiversity

aving the most important lands in perpetuity—a concept central to the conservation movement—is now taking on new meaning with the introduction of resiliency science.

The science itself is not new, but the application of resiliency to land conservation is. In 2013 and beyond it could inform how the Open Space Institute and other conservation groups are to have a lasting impact on landscapes that are increasingly being affected by climate change.

In the conservation community, *resiliency* refers to the diverse landscapes that, because of their natural complexity, are likely to withstand the serious and ongoing effects of climate change.

Science cannot now predict exactly how species and habitats will respond to temperature fluctuations, severe storms and other changes in climate. However, we can identify places that offer a broad range of land features—slopes, valleys, ravines, caves and lowlands, for example—that give species options as they seek to adjust to climatic changes. The Nature Conservancy (TNC) has studied the scientific concepts behind resiliency for more than a decade, and the more varied the landscape, TNC's studies have suggested, the more likely it will support a diversity of plant and animal life, both now and in the future.

OPPOSITE: Hiking in the Highlands; NY; photo: Greg Miller; ABOVE: Northern Green Frog; photo: Michael O'Donnell

In 2013, with the generous support of the Doris Duke Charitable Foundation, OSI is targeting the conservation of these places by launching the Resilient Landscapes Initiative, a capital fund using TNC's science as its basis that is designed to protect some of the most diverse lands in the eastern United States. Along with complementary educational and training programs, the Fund will support land protection projects in four focus areas chosen from 13 mid-Atlantic states.

"OSI's focus on resiliency represents a logical step in the evolution and maturation of conservation activities. I like that focus because it emphasizes the importance of essential ecosystem processes, not just species or habitat occurrences," said William Schuster, a biologist and the executive director of the Black Rock Forest Consortium, an educational alliance that manages the 3,830-acre Black Rock Forest in New York's Hudson Highlands. The forest, along with much of the Hudson Highlands, scores high on the resiliency matrix because of its topographical diversity.

The launch of the Resilient Landscape Initiative follows decades of conservation work not only in the Highlands, where OSI established its presence through dozens of acquisitions and park expansion projects, but throughout New York State, where OSI has acquired more than 120,000 acres in its 40-year history.

OSI's New York land protection efforts have in many cases been based on the preservation of biodiversity and

the creation or maintenance of conservation corridors, such as the 47-mile-long Shawangunk Ridge, along which OSI has protected 27,000 acres.

"We were committed to protecting biodiversity and key corridors," said Kim Elliman, OSI's president and CEO. "We began protecting these lands in New York decades ago because we knew these landscapes had significant long-term value. Analysis and mapping done in recent years now show that many of the lands OSI conserved in the Gunks and the Hudson Highlands are highly resilient."

A huge resilient swath along the Shawangunk Ridge encompasses thousands of OSI-protected acres at the Sam's Point Preserve, Minnewaska State Park Preserve, and the Witch's Hole Conservation Area. These lands represent the upper portion of a near-continuous line of conserved landscapes that stretch for miles down to the Basherkill Wildlife Management Area in Ulster County.

In the Hudson Highlands region of Rockland and Putnam counties, OSI has protected vast expanses of open space. In 1997, OSI partnered with The Trust for Public Land on a 17,000-acre acquisition to create Sterling Forest State Park. Across the Hudson River, OSI also added nearly 7,000 acres to Clarence Fahnestock Memorial State Park through 14 transactions from 1991 to 2012.

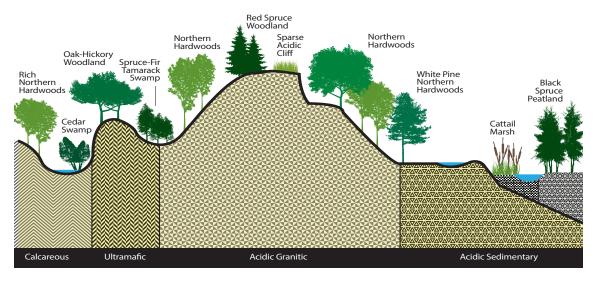
Those protected lands are all part of one massive resilient expanse that begins in northern New Jersey and extends through the Highlands, crosses the Hudson River and stretches into Putnam County.

One of OSI's most interesting projects in the Highlands region was the creation in 2010 of a slender but critical wildlife corridor between the Black Rock Forest and Schunnemunk Forest State Park; that effort led to the protection of lands now also identified as highly resilient. Indeed, the Black Rock Forest, like much of the Hudson Highlands, scores high for its diversity of land features and connectivity.

Through two acquisitions, OSI protected 185 acres between Black Rock and Schunnemunk, providing roaming ground for wildlife and preserving connectivity in a region of New York State known for its diverse habitat. The acquisitions protected land that integrated a mosaic of upland, wetland and headwater stream habitats.

Now, in 2013, OSI is taking the smart conservation principles of connectivity and diverse landscapes that served the organization for nearly 40 years in New York State and is using them to help the conservation community identify and prioritize parcels throughout the eastern United States that it believes will most likely support a broad range of natural communities





Varied topography supports more diverse vegetation, which in turn can host more wildlife species.

for centuries and millennia to come. There is a growing demand among conservationists for data and approaches to species adaptation that is freed from the uncertainties of climate predictions. OSI's Resilient Landscape Initiative, backed by TNC's science, fills an important need by identifying places that can serve as refuges regardless of how the climate changes.

"The opportunity this new fund creates is paramount," said Malcolm L. "Mac" Hunter, a professor

of wildlife ecology at the University of Maine and a member of the science committee advising OSI's Resilient Landscapes Initiative. "The lands it will conserve will truly stand the test of time, protecting both humans and wildlife in perpetuity, even as we face significant and unpredictable climate change."

BELOW: Highlands to Schunnemunk Mountain Panorama; photo: Nick Harris; ABOVE: chart: Jeffrey Jenkins (after Mark Andersen)



Jacobs Mountain in the Southern Cumberlands

New OSI fund is key to protecting an ecological hotspot

ith its first grant, OSI's new Southern
Cumberland Land Protection Fund helped
preserve an extraordinary 11,364-acre
ecological hotspot in northeastern Alabama. The parcel,
on Jacobs Mountain in Jackson County, was purchased
by The Nature Conservancy (TNC) in December on
behalf of the state of Alabama. Adjacent to 50,000 acres
of state-protected land and across the border from the
proposed Paint Rock River National Wildlife Refuge in
Tennessee, it is crucial for protecting one of the largest
intact forestlands east of the Mississippi.

"It's not every day that we do an 11,000-acre transaction," said Chris Oberholster, executive director of TNC's Alabama program. "The Southern Cumberland Fund from OSI was a critical piece to making that happen."

OSI launched the fund in October 2012 with support from the Chattanooga-based Lyndhurst and Benwood foundations and the Merck Family Fund. The \$6.75 million fund is a bold initiative to promote

regional-scale conservation in an ecologically significant but less well known part of the Southern Appalachians. The Southern Cumberland mountains of Alabama, Tennessee and Georgia contain large blocks of hardwood forest and extensive underground cave systems that support a rich variety of plants and animals, including many species found nowhere else.

Guided by wildlife habitat and landscape conservation plans, including OSI's own report, *Protecting Southern Appalachian Wildlife in an Era of Climate Change*, the fund focuses on protecting and connecting the lands most important for preserving biodiversity and allowing wildlife to adapt to climate change.

Jacobs Mountain is just the kind of project the fund was created to assist. "Because of OSI's research, not only do we know that this property is extremely important biologically, we also know that it contributes to the protection of species that are more vulnerable to the effects of climate change," said Oberholster.



This 11,364-acre parcel has been identified by OSI as among the most important in the entire Southern Appalachians. The conservation of these large, contiguous swaths of forest also protects a spectacular network of underground caves and helps maintain the region's water quality.

The property has been a conservation priority since 2002. It was the largest parcel owned by a single individual in Jackson County, a hilly landscape of small farms and deep woods in the watershed of the Paint Rock River. The river, one of the last free-flowing rivers in the Southeast, and its tributaries support some of the nation's greatest diversity of fish, mussels and other aquatic species. Caves carved by underground streams harbor bats, salamanders and hundreds of other species adapted to a subterranean world. The Jacobs Mountain parcel is especially valuable for its network of more than 50 cave entrances.

The property, which had been open to the public for hunting at one time, abuts the state's Skyline Wildlife Management Area. "We always hoped one day to be able to put it back in public use," said Gary Moody, chief of the wildlife section of the Alabama Division of Wildlife and Freshwater Fisheries.

When the landowner, an out-of-state businessman, decided to sell, he offered the property first to TNC.

The \$9.3 million deal was largely funded by Alabama's Forever Wild program and a federal Pittman-Robertson grant, channeled through the state's wildlife and fisheries division. But to complete the deal, \$1 million was needed to match the federal grant. With \$500,000 from OSI's Southern Cumberland Land Protection Fund and an equal amount contributed by Fred and Alice Stanback, everything fell into place.

"The only way our division was able to participate was because TNC was willing to come up with the match for the federal funds, and OSI provided half of that," said Moody. "It took a lot of partners who saw the value of this property in a bigger context, providing an opportunity for landscape-scale management for the benefit of future generations."

OPPOSITE: Jacobs Mountain, Jackson County, Alabama; photo: The Nature Conservancy; BELOW: Jacobs Mountain is known for its network of caves. Torode Pit, Jackson County, Alabama; photo: Alan Cressler



Biodiversity and Connectivity in New York

OSI preserves a wide range of landscapes in 2012



onnecting protected lands and preserving biodiversity—these were the themes of the Open Space Institute's land acquisition program during a busy 2012.

In the central Adirondack Park, OSI purchased a historic 295-acre parcel that includes a mile of river frontage on the Marion River and is known for a trail called the Marion River Carry. For more than a century, paddlers traveling between Utowana and Raquette lakes have used this trail as a portage connecting the Marion River to Utowana Lake.

To this day, the canoe carry serves as an important link in one of the Adirondack Park's most popular annual events, the 90-mile Adirondack Canoe Classic. Had this private inholding, entirely surrounded by publicly owned land, been developed, it could have closed down a historic recreational route.

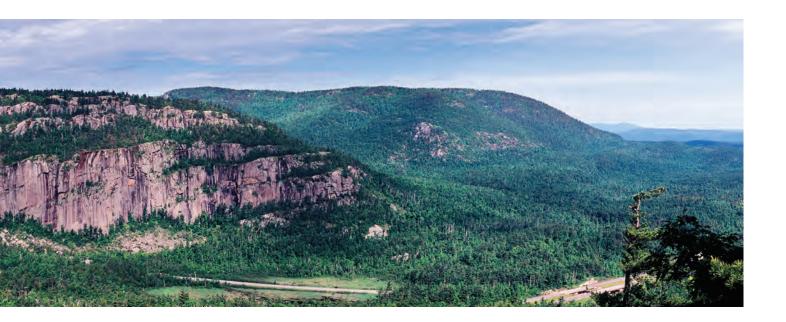
The donation of a conservation easement protecting a nearly 1,400-acre forest in the northeast corner of the Adirondack Park added to the Baldface Mountain Preserve, which the Johanson family created in 2009 when it donated its first conservation easement to OSI.

Both donated parcels, which total 2,757 acres, buffer state lands, including Pokamoonshine Mountain, and contain diverse, resilient landscapes—rich wetlands, mountain peaks and rock faces that will continue to provide wildlife habitat even as the climate is changing (see *Resiliency* article, page 3).

In the lower Hudson Valley, OSI acquired two parcels (13.6 acres combined) in Putnam County that build on a regional vision to create a hiking corridor between Clarence Fahnestock Memorial State Park and Hudson Highlands State Park Preserve—parks to which OSI has added thousands of acres over the past three decades.

The acquisitions, which complement another recent purchase made by the Hudson Highlands Land Trust, help advance the goal to link the two state parks, which would allow the public to hike from the shoreline of the Hudson River to the ridgelines of the Hudson Highlands and never leave state parkland.

For decades, OSI's work in New York State has protected biodiversity and created connections between conserved lands—habitat-reinforcing work in the face of climate change.



The purchase of the 233-acre Little Stony Kill Falls parcel in Ulster County protects one of the last major waterfalls in private ownership in the Shawangunks. It also provides linkages for new trailheads that will serve thousands of acres at the Minnewaska State Park Preserve.

Also in the Shawangunks, the acquisition of the 435-acre forested Ridgeview property, in partnership with the New York—New Jersey Trail Conference and Orange County Land Trust, increases the network of preserved lands along what was the least-protected stretch of the Kittatinny-Shawangunk Ridge.

The Ridgeview acquisition protects the flora and fauna of the southern Shawangunks and links conserved lands between the New Jersey border and the Huckleberry Ridge State Forest and Sam's Point Preserve

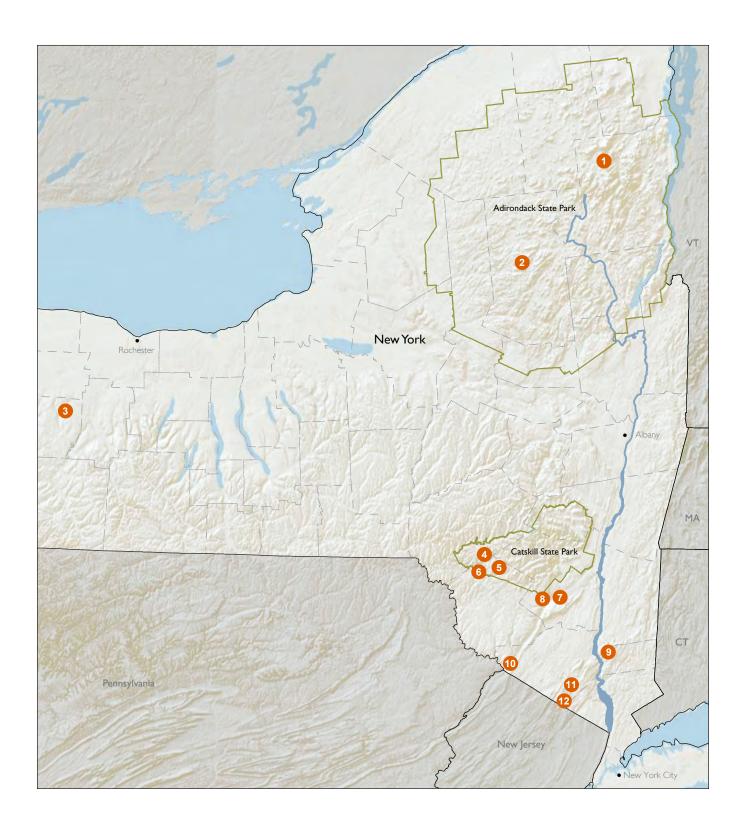
For decades, OSI's work in New York State has protected biodiversity and created connections between conserved lands—habitat-reinforcing work that is now even more valuable in the face of climate change.



TOP: Pokamoonshine Mountain and the Baldface Mountain Preserve in the Adirondacks, Essex County, NY; photo: Carl Heilman II / Wild Visions, Inc.; ABOVE: Stony Kill Falls, Ulster County; photo: Bob Stone

Open Space Institute

2012 New York Land Projects



OSI preserved 1,043 acres in New York State in 2012 and prepared to transfer thousands of additional acres to New York state parks for public enjoyment.



Baldface Mountain Preserve Phase II I,356 acres, Essex County

This easement, donated by the Johanson family, protects a highly scenic landscape of contiguous forest in the Adirondacks, including lands visible from Pokamoonshine Mountain and the historic Pokamoonshine Firetower.

2 Marion River Carry 295 acres, Hamilton County

Located in the central Adirondack Park, this property includes forest lands, part of the Marion River and Utowana Lake and an historic canoe carry — a portage around rapids in the Marion River to Utowana Lake.

3 Humphrey House 3 acres, Wyoming County

Donation of a house in the village of Warsaw, outside Rochester, from Peter and Sally Humphrey. Per the Humphreys' wishes, the parcel will be sold, with the net proceeds directed to help fund a new nature center in Letchworth State Park.

4 Beaverkill Addition 10 acres, Sullivan County

The property in the Beaverkill Valley is traversed by Big Pond Brook, a tributary of the Beaverkill River.

5 Beaverkill Addition 15 acres, Sullivan County

A conservation easement protects land in a focus area at the center of decades of public and private conservation efforts in the Beaverkill Valley.

6 Beaverkill Addition 43 acres, Sullivan County

A conservation easement protects a property that is located in an area which has been the focus for decades of public and private conservation efforts in the Beaverkill Valley.

7 Shawangunk Ridge Greenway Addition I

30 acres, Ulster County

This addition to the Greenway protects the Peterskill Conservation Area on the northern boundary of Minnewaska State Park Preserve and the western boundary of the Mohonk Preserve.

Shawangunk Ridge Greenway Addition UNA 233 acres, Ulster County

This property is contiguous to the Witch's Hole Conservation Area, a remote part of the Minnewaska State Park Preserve. The UNA property will allow access to major waterfalls in the Shawangunks and two potential trailbands.

Fahnestock to Highlands Corridor

14 acres, Putnam County

Protection of the property furthers a decade-long goal of OSI, NYS Parks and Hudson Highlands Land Trust to connect Clarence Fahnestock State Park with Hudson Highlands State Park.

Ridgeview

435 acres, Orange County

OSI, with the New York-New Jersey Trail Conference and the Orange County Land Trust, protected the Ridgeview property on the southern Shawangunk Ridge. The scenic forestland includes meadows and four small ponds. It provides opportunities for an enhanced recreational trail system, including an improved route for the Shawangunk Ridge Trail.

Bazylevsky Farm Sacres, Orange County

The property, also known as Rabbit Run Farm, is located in the hamlet of Bellvale, where it sits adjacent to two of the largest protected farms in town. Along with the Hampton Hills Farm, Bazylevsky was protected with funds from Warwick's 2006 Community Preservation Act.

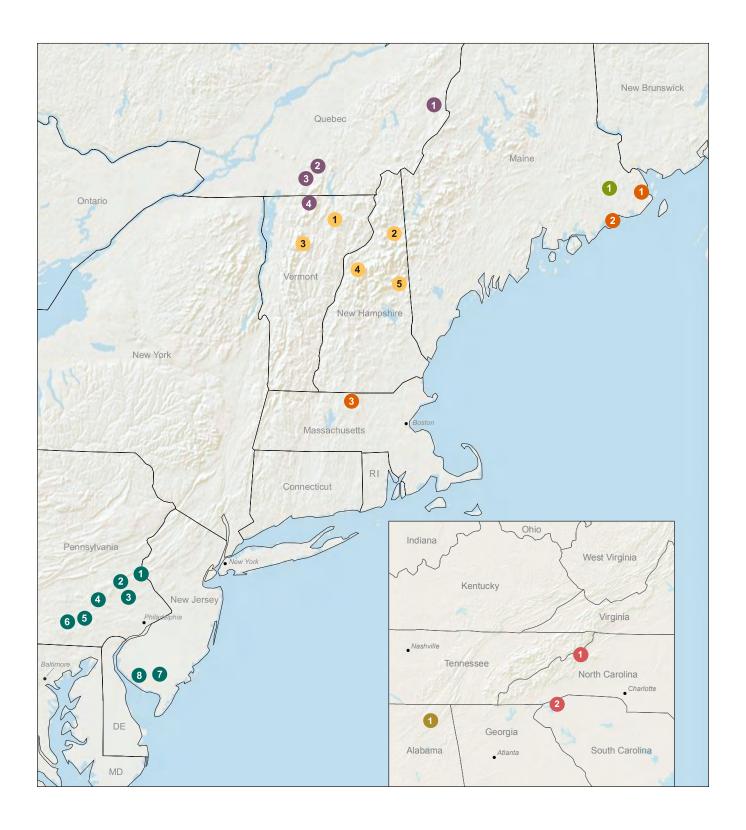
Hampton Hills Farm122 acres, Orange County

The farm sits in the nationally renowned "black dirt" region, a 14,000-acre expanse of deep, rich soils that stretch across five towns. The easement was purchased with town of Warwick funding from the 2006 Community Preservation Act.

OSI's first preservation efforts were in the 1970s in the Beaverkill Valley. ABOVE: Iconic Beaverkill covered bridge, Lew Beach, NY; photo: Michael O' Donnell

Open Space Institute

2012 Conservation Capital Projects



Bayshore-Highlands Fund

Heritage Conservancy McCarthy Farm, 66 acres Bucks County, PA Project: \$552,475 Grant: \$53,448

A conservation easement protects working farmland, pasture, wetlands and bog turtle habitat bordering Cooks Creek, a wild trout fishery and an Exceptional-Value Stream.

2 Berks County Conservancy Oley Hills - Gehman property 170 acres, Berks County, PA Project: \$338,250 Grant: \$14,020 A conservation easement protects

A conservation easement protect mature forest, scenic diabase boulders and a State-designated Exceptional Value trout stream.

3 Montgomery County Lands Trust

Rogers Property, 81 acres Montgomery County, PA Project: \$1.6 million Grant: \$150,000

Lying within the exceptionally biodiverse Unami forest, this project protects mature forest with diabase geology, the historic 1757 Daniel Hiester House and sections of two State-designated High Quality Streams.

4 Natural Lands Trust Green Hills, 171 acres

Berks County, PA Project: \$1.8 million Loan: \$929,000

The property lies in the headwaters of the Allegheny Creek, a statedesignated Cold Water Fisheries stream near the Hopewell Big Woods. The site contains a spring-fed bog and one of the largest colonies of bog turtles in PA.

5 Stoltzfoos Farm Easement Lancaster Farmland Trust 73 acres, Lancaster County, PA Project: \$514,660 Grant: \$43,000

A farmland preservation easement protects this Amish dairy farm bordering the Pequea Creek. The owners have installed numerous farm conservation practices to protect water quality in the creek.

6 Fisher Farm Easement Lancaster Farmland Trust 98 acres, Lancaster County, PA Project: \$373,770 Grant: \$52,640

This Amish dairy farm bordering the Pequea Creek is protected by a farmland easement. The site contains prime agricultural soil and the landowners have adopted best management practices, including notill cover cropping, crop rotation, strip cropping and contour farming.

7 The Nature Conservancy Diocese of Camden

Manumuskin River, 156 acres Cumberland County, NJ Project: \$1.3 million Grant: \$100,000 Preservation of this tract completes the final phase of a project to conserve 600 acres of pine-oak

conserve 600 acres of pine-oak woodland and wetlands in NJ's Cumberland forest, protecting statelisted species of amphibians, reptiles, birds and rare plants.

8 New Jersey Conservation

Adamucci Farm, 48 acres Hopewell Township, NJ Project total: \$345,600 Grant: \$57,600

A conservation easement protects a productive Bayshore farm with prime agricultural soils bordering the Cohansey River and overlooking a tidal marsh.

Community Forest Fund

Vermont Land Trust
Nulheganaki Tribal Forest
65 acres, Barton, VT

Project: \$181,000 Grant: \$39,230
This is the first forest that the

Nulhegan Abenaki have owned in 200 years and it includes a productive sugarbush. It will be an economic, educational and cultural resource for the tribe.

2 Town of Milan Milan Town Forest

Milan, NH

Support grant: \$5,500

This rural northern New Hampshire town is using a support grant to inventory potential community forest lands and build community engagement.

3 Stowe Land Trust Cady Hill Forest 259 acres, Stowe, VT

Project: \$1.6 million Grant: \$100,000

This community effort, with funds from the state, town and 650 individuals, conserves a deer wintering yard, mountain biking trails and productive forest in the heart of town.

4 Amonoosuc Conservation
Trust

Easton/Sugar Hill Community Forest 840 acres, Easton, NH Support Grant: \$17,500

A support grant enabled the land trust to secure a purchase option on an 840-acre property and engage several towns in a nationally recognized community forest effort.

5 The Trust for Public Land Albany Town Forest 302 acres, Albany & Conway, NH Project: \$900,000 Grant: \$150,000

Project: \$900,000 Grant: \$150,000 At the edge of the White Mountains, Albany now has a community forest that will provide timber revenue, aquifer protection and access to the Swift River.

Northern Forest Fund

Downeast Lakes Land Trust
 West Grand Lake Forest

21,870 acres, Grand Lake Stream, ME Project: \$9.95 million Grant: \$500,000 A conservation easement held by the state of Maine protects a world-class cold-water fishery, abundant wetlands and productive forests.

Saving New England's Wildlife

Maine Coast Heritage Trust
Sipp Bay, 241 acres
Perry & Pembroke, ME
Project: \$1.6 million Grant: \$127,940

Five miles of conserved wild shoreline on Sipp Bay and a contained tidal inlet within Cobscook Bay provide high value habitat for wading birds and

2 Pleasant River Wildlife Foundation

waterfowl.

Pleasant Bay Wildlife Management Area, 168 acres, Addison, ME Project: \$857,500 Grant: \$145,000

The project conserves the first six parcels of a 2,000-acre wildlife management area, including intertidal and freshwater wetlands and their forested buffers.

Mount Grace Land Conservation Trust

state-listed wildlife species.

Greater Ashburnham Habitat Reserve I,262 acres, Ashburnham, Ashby & Fitchburg, MA

Project: \$2.1 million Grant: \$280,000 Lying within a 30,000-acre conservation network, this land includes woodlands, wetlands and streams, including habitat for six

Wildlife Conservation Society Climate Resiliency Data on 2C1F Atlas Amplification Grant: \$15,000

This grant provides new data on the habitats most resilient to climate change for the Two Countries, One Forest online atlas.

Southern Cumberland Land Protection Fund

The Nature Conservancy lacobs Mountain

11,364 acres, Jackson County, AL Project: \$9.3 million Grant: \$565,000

A large forested tract was conserved adjacent to 50,000 acres of protected land and the ecologically rich Paint Rock River. Its karst landforms include more than 60 caves.

Transborder Fund

Nature Conservancy of Canada

Green Mountains - Phase II 573 acres, East Bolton, Quebec Project: \$745,000 Grant: \$26,475

This project conserves a large block of working forest, as well as critical habitat, in Quebec's Green Mountains

2 Appalachian Corridor Green Mountain Corridor 38 acres, Bolton, Quebec Project: \$230,000 Grant: \$16,000 ACA continued its efforts to link

ACA continued its efforts to link critical habitat in southern Quebec through partnerships with local land trusts and landowners.

3 Nature Conservancy of Canada

Portage Lake St.Theophile, Quebec Grant: \$50,000

OSI's support grant will help further protection of a chain of remote ponds and unfragmented habitat along the international border. An additional stewardship grant will be provided when the project closes.

4 The Trust for Public Land Jackson Valley

936 acres, Jay, VT Project: \$719,000 Grant: \$93,890

This US working forest lies directly across from protected land in Canada and is an ecological keystone that connects more than 22,000 acres of forestland in both countries.

Southern Appalachian Loan Fund

Osouthern Appalachian Highlands Conservancy Grassy Ridge

600 acres, Avery County, NC Project: \$3.9 million Loan: \$1.65 million

The project connects the Pisgah National Forest and other significant natural heritage areas in the Greater Roan Highlands; it preserves a highly significant wildlife corridor and a trail connection between Little Yellow Mountain and the Appalachian Trail.

2 Natureland Trust

Cherokee Foothills National Scenic Highway, 295 acres Pickens County, SC

Project: \$1.9 million Loan: \$1.5 million The property is highly visible from the Scenic Highway and is contiguous with other important conservation lands held by The Nature Conservancy and the SC Department of Natural Resources

Citizen Action Connects the Dots

OSI helps environmental start-ups find their place

From the organization's earliest beginnings to the present day, the Open Space Institute's most successful initiatives can in many cases be traced to the Citizen Action program and the numerous grassroots organizations it has nurtured.

OSI was founded 40 years ago as a voice for open space protection. Its first-ever publication, *Stewardship*, was "prepared for concerned landowners in suburban and rural areas subject to the land consuming pressures of urbanization." The organization's founders envisioned OSI as something of an advocacy organization—one that would help small groups in New York's Hudson River Valley and, through its experience and know-how, enable others to protect land in their own communities.

For many years, OSI functioned in that way, offering a suite of services such as technical and bookkeeping assistance to small community groups for which cumbersome administrative tasks were a distraction from their real missions.

"In the early years it was an extremely vital part of the organization," said Sam Huber, a member of OSI's Board of Trustees since 1983. "Although the term 'fiscal sponsorship' had not been invented back then, that's what we were doing—enabling smaller groups to do what they wanted to do."

In the mid-1980s, as OSI began directly acquiring more land and grew into a regional and ultimately nationally known land trust, advocacy became integrated into the organization with the formal creation of the Citizen Action program.

Since its establishment as an official program, Citizen Action has assisted more than 120 locally based environmental organizations working to make their communities a better place. Much like the start-ups that OSI worked with in its early days, Citizen Action groups are in many cases all-volunteer and lack the resources or staff to complete financial reporting or handle other back-office responsibilities.

The Citizen Action program helps the groups with strategic advice, funding contacts and grant writing.

While OSI continued to evolve—first expanding its acquisition programs throughout New York State and



Throughout the years, OSI has assisted over 120 environmental organizations working to make their communities better places.

then extending a visionary conservation finance program up and down the East Coast, from Canada to Georgia—the organization's leaders often found themselves drawn back to Citizen Action, as a kind of steadying force in the face of such rapid and tremendous growth.

"OSI as an institution evolves as it refines its approaches to landscape conservation," said Antonia Bowring, OSI's chief operating officer, who has directed the Citizen Action program for the past four years. "When the priorities of the organization are being redefined—and for very good reasons—I think we can look at Citizen Action and the groups that it's working with to determine what needs to be a part of OSI's larger conversation."

One example, Huber noted, can be seen in the Kinderhook corridor of Columbia County, where OSI has protected close to 1,000 acres of farmland. As OSI decided to dedicate resources in that region, the Citizen Action program also sponsored a number of local groups whose goals and priorities were consonant with OSI's.

"The Citizen Action program helps keep in focus

the value of our work to the people and communities within those landscapes," he said. "OSI's efforts to protect working farmlands, for example, have dovetailed snugly with Citizen Action's sponsorship of farm-to-table organizations, urban agricultural initiatives and environmental education efforts aimed to connect people to the lands where they live."

In March 2009, the Hudson River Watershed Alliance (HRWA) approached the Citizen Action program for fiscal sponsorship. HRWA, started by a handful of dedicated environmentalists who wanted to form an educational network for the Hudson River watershed, was seeking stability and assistance in winning grants for its constituent organizations.

"The Citizen Action program enabled us to find our own identity," said Katy Dunlap, HRWA's former executive director, now the eastern water project director for Trout Unlimited. "Citizen Action gave us legs to

OPPOSITE: Hudson River Catskill Panorama from the Greenport Conservation area, a Columbia Land Conservancy site; photo: Bob Stone; BELOW: photo: Earth Matters



stand on and guidance when we needed it. OSI allowed us to fulfill our goals without micromanaging our activities."

During the HRWA's time in the program, OSI held a series of roundtable discussions, which gave the Citizen Action groups an opportunity to swap notes on budgets, bookkeeping and other administrative responsibilities.

"It was very clear that OSI had experience working with groups, and learning lessons from the others who had gone through similar challenges was extremely helpful," Dunlap said.

As it grew, HRWA became a partner in the state Department of Environmental Conservation's Hudson River Estuary Program, working to promote watershed protection and management of tributaries to the Hudson. Through hard work and with OSI's assistance, HRWA received its 501(c)(3) status and graduated from Citizen Action in early 2012.

It's not difficult to see Citizen Action's ongoing influence in OSI's programming today. As OSI continues saving agricultural land throughout the Hudson Valley and is planning an innovative farming incubator project in Ulster County, Citizen Action is

assisting urban farming programs in New York City's five boroughs that are redefining food systems and teaching schoolchildren where their food really comes from.

Similarly, as OSI's Alliance for New York State Parks works to secure a second year of critically needed capital funding for state parks (see *Alliance* article, page 18), Citizen Action is supporting "friends groups" that advocate for maintenance and upkeep of their own neighborhood parks. The connections are many and they are enduring.

"In the 20 years it has operated as its own program, Citizen Action has run on a parallel track with OSI as a whole," said Matthew Davidson, also a member of OSI's Board of Trustees. "What OSI accomplishes on a larger scale, Citizen Action achieves in our communities. And I think that strong grassroots connection continues to give this organization its authenticity. You will not find that anywhere else."

BELOW: In Columbia County, OSI protected farmland and supported local environmental groups. Farmland, Ghent, NY; photo Kate Lindquist/Flickr



OSI Citizen Action Groups (current groups are bold)

93rd/94th St. Preservation Alliance

Abingdon Square Alliance

AFFIRM, Inc.

Alaskan Education Project

Ananda Harvest

ASSURE

Ayres Law Group

Better Future Project

BioCities Inc

BiomimicryNYC

BK Farmyards

Black Urban Growers

Brooklyn Food Coalition

Butterfly Project

Catskill Mountainkeeper

Catskill Organizing Committee

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Photo: BK Food Coalition

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OSI envisions state parks that provide the best visitor experience



any of OSI's signature landscapes are directly associated with flagship state parks like the Palisades, the Hudson Highlands, the Shawangunk Ridge, Sterling Forest and the Helderberg escarpment. So intertwined are the history and objectives of OSI with the evolution of New York's state parks that the 2010 creation of the Alliance for New York State Parks program was a natural extension of the OSI mission.

OSI's advocacy for park stewardship and policy was opportune; the general condition of the parks system had deteriorated to the point that state parks faced a capital backlog totaling more than \$1 billion. The very real threat of park closures loomed in the minds of New Yorkers.

Out of this crisis was born OSI's Alliance for New York State Parks. With the early leadership of former Parks Commissioner Carol Ash and tireless parks champion Lucy Rockefeller Waletzky, the Alliance had early success in increasing awareness of the plight of parks and helping renew the state's commitment to restoring these natural, cultural and recreational treasures. Over the past two years, more than \$200 million in state funds has been set aside for infrastructure repairs and upgrades.

These steps not only refurbish our parks, they also create an exciting dynamic. To the great credit of Gov. Andrew Cuomo and State Parks Commissioner Rose Harvey, a true renaissance is underway. Basic but critical issues—how the parks are managed, how they serve the public, and how relationships with partners can be forged and strengthened to enhance park offerings and preserve landscapes—are getting a fresh look.

"These are exciting times," says Harvey. "There is growing energy and interest in our parks. With that comes the opportunity, and really the necessity, to rethink and reimagine how we can improve the way we care for our natural resources, enhance and modernize the way we serve and engage the public, and be creative in forming partnerships and seeking outside support for

In 2012 New York's 214 state parks received \$143 million, which has been put to use to repair, restore and improve the system's aging and outdated facilities.



the work we do. OSI and the Alliance program are vital partners in these endeavors."

A prime example of the successful partnership between the state and OSI is the completion of the Alliance's inaugural capital campaign: \$500,000 to restore the Hamilton Point carriage road at Minnewaska State Park Preserve.

In marking this achievement, Harvey recalled OSI's long preservation history throughout the Shawangunk Ridge and expressed appreciation for the developing partnership. Kim Elliman, OSI's CEO, echoed the sentiment. "It is somehow appropriate that as we move into the new phase of our relationship, we return to Minnewaska with OSI's first project and showcase what can be accomplished through responsive and creative partnering," he said.

Building on the success at Minnewaska and branching out, the Alliance is leading an effort to improve and modernize the Canopus Lake area at Clarence Fahnestock Memorial State Park in the Hudson Highlands, another core OSI landscape. Also at the forefront is Jones Beach State Park, where the Alliance is supporting much-needed improvements, as well as the creation of a long-term vision for Robert Moses' historic beachfront park.

At the same time, OSI continues to bring its land conservation mission to bear, purchasing strategic properties at Minnewaska and Fahnestock to further protect these landscapes.

The acquisitions, along with ongoing work to upgrade existing parks, stand as strong reminders of OSI's broad commitment to New York's landscapes—to both protecting land and providing an enriched experience for the more than 60 million people who visit our state parks each year.

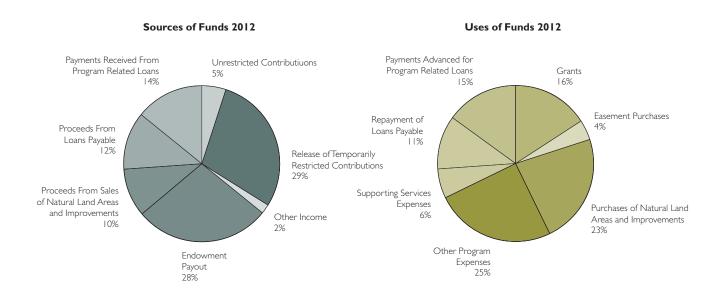
OPPOSITE: Repairs at Staatsburg State Historic Site, NY; RIGHT: Falls at Letchworth; photos: New York State Department of Parks

Open Space Institute 2012 Financial Report

Open Space Institute, Inc. and Consolidated Entities Selected Financial Information December 31, 2012 and 2011			
	2012	2011	
Sources of Funds			
Unrestricted contributions	\$1,428,308	\$471,208	
Release of temporarily restricted contributions	8,594,512	20,844,007	
Other income	535,482	410,044	
Endowment payout	8,445,160	4,412,840	
Proceeds from sales of natural land areas and improvements	3,126,547	9,985,173	
Proceeds from loans payable	3,733,804		
Payments received from program related loans	4,048,322	5,730,927	
Taymono room program roaded road			
Total sources of funds	\$29,912,135	\$41,854,199	
Uses of Funds			
Grants	\$(4,535,516)	\$(5,762,262)	
Easement purchases	(1,208,382)	(1,665,626)	
Purchases of natural land areas and improvements	(6,535,365)	(14,040,218)	
Other program expenses	(7,316,033)	(6,999,628)	
Supporting services expenses	(1,779,861)	(1,818,487)	
Repayments of loans payable	(3,046,421)	(6,128,229)	
Payments advanced for program related loans	(4,453,802)	(305,425)	
Total uses of funds	(28,875,380)	(36,719,875)	
Net Sources & Uses of Funds	\$1,039,755	\$5,134,324	
Financial Statement of Activities			
Unrestricted contributions	\$1,428,308	\$471,208	
Restricted contributions	5,432,456	22,106,104	
Other income	535,482	410,044	
Grants	(4,535,516)	(5,762,262)	
Easement purchases	(1,208,382)	(1,665,626)	
Other program expenses*	(7,651,528)	(7,378,821)	
Supporting service expenses	(1,779,861)	(1,818,487)	
Realized and unrealized gain / (loss) on real estate	(5,302,685)	(2,049,660)	
Investment activity (incl. unrealized gain / loss on investments)	25,799,885	1,754,899	
Change in net assets	\$12,718,159	\$6,067,399	
Other Key Financial Information			
Total assets	\$259,896,438	\$242,705,493	
Net assets - unrestricted	73,797,633	71,380,415	
Net assets - temporarily restricted	172,701,966_	162,401,025	
Total net assets	\$246,499,397	\$233,781,440	

^{*}Other program expenses in the Use of funds schedule excludes discount expense on loans receivable, depreciation and in-kind interest expense; however, Other program expenses shown in the Financial statement of activities schedule includes these items.

Sources and Uses of Funds



In 2012, the Open Space Institute acquired for conservation over \$7 million in land and easements in New York State (largely made possible by the Lila Acheson and Dewitt Wallace Endowment), and it awarded more than \$4 million in regrants to land trusts in the Mid-Atlantic states, New England, the Southern Appalachians, and the Quebec-New Brunswick Transborder region for habitat protection.

The financial information presented includes activities of both the Open Space Institute and the Open Space Conservancy, the land acquisition affiliate of OSI. The information should be read in conjunction with the audited consolidated financial statements and related notes, available from OSI on request. In the interest of a timely annual report, this analysis was prepared based on the 2011 Audited Financial Statements and the draft 2012 Financial Statements.

Since 1974, the Open Space Institute has assisted in the protection of nearly 2.2 million acres of land throughout the eastern United States and Canada. The organization's core programs are land conservation, conservation capital, advocacy and funding for parks and support of community-based environmental groups.

The Open Space Institute, Inc. was incorporated in 1974 under section 402 of the Not-For-Profit Corporation Law of New York and is a tax-exempt public charity under Section 501(c)(3) and 509(a)(1) of the U.S. Internal Revenue Code. All contributions to the Open Space Institute, Inc. are tax-deductible to the fullest extent of the law. A copy of our latest financial annual report may be obtained by writing to OSI or the New York Department of State, Office of Charities Registration, The Capitol, Albany, NY 12231.

Thank You to Our Supporters

The Open Space Institute thanks all who have made the vital work of land conservation possible. Our shared vision for the future means that the stories on these pages are just as much yours as ours.

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In Memory of Felix Kaufman



Felix Kaufman, a longtime member of the OSI Board of Trustees, passed away in November 2012.

Felix, an accountant at Coopers & Lybrand, brought great financial and management acumen, as well as a comforting, calm demeanor, first to the Natural Resources Defense Council (NRDC) and then to the Open Space Institute during its formative years in the early 1970s.

"I met Felix when he was volunteering at Friends of the Earth," recalled John Adams, the cofounder of both NRDC and OSI, "and I thought that he was quite special. About two years later, when we were starting OSI, we needed someone who could help us with finances. What we got was this incredibly talented, smart man whom I ended up working with for 40 years."

"Felix Kaufman was a quiet, rational voice for conservation," said Joe Martens, OSI's president from 1998 to 2010 and now the commissioner of New York's Department of Environmental Conservation.

Susan Barbarisi, OSI's director of administration, remembered his genuine interest in OSI. "We would take Felix out to look at the properties we were protecting. He really wanted to see the landscapes and understand why they were important."

Felix was an avid gardener and sports fan, and was always eager on a Monday morning to talk about the weekend's games. He was forever devoted to his wife, Eleanor, their two sons, and their grandchildren.

Felix resigned from OSI's board in September 2012, shortly before his passing. At that time, Kim Elliman, OSI's president and CEO, spoke to the other trustees about his contributions—efforts for which he never sought praise.

"Felix constituted good governance, board oversight, and best financial and management practices," Elliman said. "It was an honor to work with someone so dedicated to taking the right course for OSI."

When asked to sum up what drew him toward Felix Kaufman initially, John Adams spoke about how humble but effective Kaufman was.

"He didn't brag about these things," Adams said, "but NRDC and OSI are two of the best-managed environmental organizations in the country, thanks to Felix. He had such talent and he was so committed. He was a great friend to OSI."

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Amy Vedder and Bill Weber



Drs. Amy Vedder and Bill Weber grew up in small towns in central New York State, spending their childhoods wandering the woods of the Mohawk Valley and the Finger Lakes.

The two met at

Swarthmore College and decided to enter the Peace Corps together in 1973, which opened doors for the young married couple to explore conservation opportunities all over the world.

Their work in Africa, supported by the Wildlife Conservation Society (WCS), led to a pioneering ecotourism and community outreach program in Rwanda to help save the endangered mountain gorilla, whose population has doubled since the 1970s—a remarkable conservation effort described in their book, *In the Kingdom of Gorillas*.

Stateside, they have served in senior leadership positions with WCS and The Wilderness Society. Closer to their home in the Adirondacks, Weber is a member of the board of Two Countries, One Forest (2C1F), an OSI partner in the critically important Transborder area stretching across the U.S.-Canadian boundary.

"We have this Transborder area that's the size of Germany," Weber said, "and the question is—how do we achieve conservation, particularly connectivity, in the age of climate change? As climate impacts create changes in habitat, wildlife will need to roam widely and freely between protected lands."

"Whether it's elephants in Africa or moose or lynx in North America, it's connectivity that matters," Vedder added.

Through their participation on other organizations' boards, such as 2C1F and the Adirondack Nature Conservancy, Vedder and Weber have seen firsthand the value of conservation partnerships.

"We both have come to very much respect the Open Space Institute," Vedder said. "The work that OSI is doing, and the quality of outcomes as a result, is extremely high. These are challenging times, so it's important to see an organization that works with others to tackle complex issues in important places."

Nearly 40 years after joining the Peace Corps together and first traveling the world, both Vedder and Weber say they're still enamored with the outdoors, just as they were as children, puttering around central New York's forests and waters searching for salamanders.

"I feel the same kind of wonder when I wander in the woods at home," Vedder says. "I'm really pleased that this is still something that is a part of my life." Eugenie & Brad Gentry Frederic & Karin Harder Marjorie L. Hart Joseph & Deborah Holland Steven G. Horowitz leffrey Huebner locelyn Jerry Eric & Laura Jordahl Peter Kann & Karen Elliott Hugh Karraker Richard Koenig Robert Kresse Robert & Elaine Le Buhn Carol LeFevre John Luongo Artie Malkin & Christine Tramontano David T. Mance, Ir. Langdon Marsh & Ellie Putnam Sally Mazzarella lames McGee Josephine A. Merck Richard & Joan Meril David Metzger Yuki Moore Laurenti Marc Moran & Mala Hoffman Ken & Lindsay Morgan Charles & Sarah Morgan Peter A. Morgan Michel Negroponte & Ioni Werhli Caroline P. Niemczyk Ralph W. O'dell, Jr. Anne O'Neill Susan & Craig Orchant David Paton Marilyn Perry Charles Platt Richard Polich Richard & Roberta Polton Kenneth Posner Martin & Jeanne Puryear Dan & Jean Rather John & Lynne Rathgeber Sally Reid & John Sigel Ted Reiss & Robi Josephson Avery & Monica Rockefeller, III Paul Russell Mary & Winthrop Rutherfurd Arnold Saks Kenneth & Bonnie Scheer lack & Alice Schoonmaker Flizabeth Schulte Richard M. Schwartz Philip & Martha Scott

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Neil Zimmerman



For H. Neil Zimmerman, his love of the outdoors can be traced back more than 35 years—to a raffle, a car and little bit of luck.

"It all started in 1974 when I won a car in a raffle and didn't know

what to do with the thing," Zimmerman said. "I was lucky enough to be in New York, which has a wealth of open space, so I started going camping with friends."

Those camping trips familiarized Zimmerman, now 67, with the maps of the New York/New Jersey Trail Conference, an organization he ultimately joined, and then served as president from 1987 to 2001. During his time with the Trail Conference, the organization published a Shawangunk trail map, which acquainted Zimmerman with a core area for OSI's landscape protection efforts.

"Week after week, as we came up to check for the accuracy of the maps, we were blown away by the beauty of the Shawangunks," he said.

He has since moved to Accord, NY, in the heart of the region, and is now president of the Friends of the Shawangunks.

Zimmerman got to know OSI in the early 1990s when the Trail Conference made OSI a loan for the acquisition of an Ulster County parcel that contained a section of rail trail. With the loan in place, OSI was able to complete the transaction.

"That was a huge key for us," he said, "that our little trail fund could make that much of an impact."

The Trail Conference was also able to spur the public-private partnership that eventually led to OSI and The Trust for Public Land's successful negotiations to create the 17,000-acre Sterling Forest State Park in the New York-New Jersey Highlands

"It's been a great time for land conservation here in New York, and much of that is due to the Open Space Institute and its pioneering work," Zimmerman said. "There is no other area in the country that I know of that has such a powerful advocate for the environment as the Hudson Valley does with OSI."

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2012 Hudson Valley Grants

Barnabas McHenry Hudson River Valley Awards

The Barnabas McHenry Hudson River Valley Awards provide financial support to young leaders and exemplary projects that make significant contributions in environmental conservation, historic preservation, tourism and the arts in the Hudson River Valley.

Environmental Conservation

Sarah Parks, Rensselaer Plateau Alliance

Tourism

Erin Hoagland, Winnakee Land Trust

Historic Preservation

Marissa Unger, Olana Viewshed

Arts

Meredith Clavin-Marquet

Orange County Citizens Foundation

Malcolm Gordon Charitable Fund

The Malcolm Gordon Charitable Fund focuses on environmental education projects and programs in the mid-Hudson River Valley that increase awareness of environmental issues and to help conserve and steward the landscapes of the mid-Hudson River Valley.

Boscobel Frances Stevens Reese Woodland Trail Cary Institute

Constitution Marsh Audubon Center and Sanctuary
The Hudson River Valley Institute at Marist
College

Rondout Valley Growers Education Project Stony Kill Foundation Storm King Art Center



View from Boscobel; photo: Nick Zungoli

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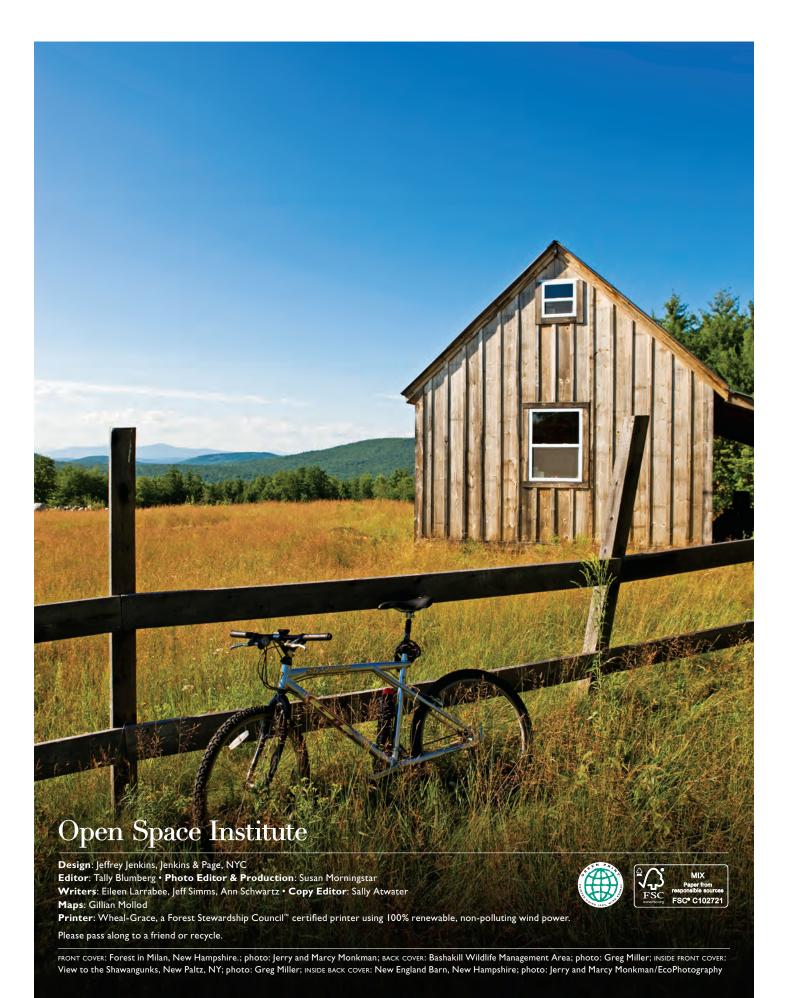
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