

# THE SAN JUAN PRESERVATION TRUST

## *Land & Legacy*

A Quarterly Report • Spring 2005 • [www.sjpt.org](http://www.sjpt.org)

### *26<sup>th</sup> Annual Report to Membership*

In 2004, the year of our 25<sup>th</sup> Anniversary, the San Juan Preservation Trust permanently protected 405 acres and 2,587 feet of shoreline on 10 properties located on six islands. These numbers include both land purchases and voluntary conservation agreements with private landowners, and represent four working farms, four properties harboring old growth trees, four freshwater wetlands, a key riparian corridor, and three natural areas that will be managed by public agencies to provide primitive walking trails for everyone. Since our inception in 1979, the Preservation Trust has protected 9,722 acres (over 15 square miles) and 116,243 feet of shoreline (over 22 miles) in the San Juan Archipelago.

These are the statistics. It was a good year. That said, there are so many wonderful stories – and amazing people – behind all of these numbers.

Our most publicized success in 2004 was the completion of our “Sares Bluff” acquisition on Fidalgo Island. Re-named “Montgomery-Duban Headlands Park” (in honor of a Fidalgo Island family that breathed new life into a challenged fundraising effort), this 37-acre property with 1,350 feet of rugged shoreline was purchased by leveraging public and private funds, then folded into Skagit County’s adjacent Sharpe Park.

Amplifying our commitment to the Skagit County portion of our archipelago, we gratefully received a 10-acre conservation easement donation from a Guemes Island family, expanding protection on their forested homestead and connecting

other protected lands in the center of this magical island.

On Shaw Island, we worked with a family to place a conservation easement on their 44-acre farmstead overlooking Blind Bay, ensuring that good agricultural land and a familiar landmark meadow (visible to ferry travelers) will be protected

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from future development. On San Juan Island, a landowner donated a “forever wild” easement that protects 940 feet of shoreline at the head of Mitchell Bay, providing marine wildlife with a critical refuge within this dense neighborhood of waterfront homes.

A relatively young supporter of the Preservation Trust recently passed away, leaving as a gift to our islands a spectacular conservation easement on 80 acres of Orcas Island forest (including old growth), 300 feet of shoreline, and important riparian and estuary habitat. We are always humbled by bequests, and this one obviously knocked our socks off.

We worked with a Lopez Island fam-

ily to extend protection of a large pasture that had been partially protected in 2003 by two neighboring families. Together, these three easements now protect over 70 acres and a popular island view. Motivated by this same “neighborhood easement” concept, a visionary Orcas Island woman placed a conservation easement on her 22 acres of forest, wetland, and farmland. She hopes that this gesture will encourage her own neighbors to expand protection on the extensive wetland system that they all share in common.

After years of contemplating his responsibility to his land, the descendant of an historic San Juan Island family donated a conservation easement to us on his 150-acre working forest, farm, and remote wetland habitat. Fronting a large stretch of frequently-traveled county road, this is one of those expansive properties that every San Juan resident enjoys as an integral part of their island experience. The legacy of this family, thanks to their generous heir, will now remain protected – and productive – in perpetuity.

In a complex deal that involved close cooperation with the San Juan County Land Bank and two couples willing to sell their jointly-owned property to us at a significant discount, we shared in the purchase of 22 acres on Mt. Ben, a prominent hilltop near the southwestern coast of San Juan Island. Combined with an adjacent 12-acre property on the eastern flank of the mountain that we purchased early this year, this acquisition will create a 34-acre nature preserve and

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The San Juan Preservation Trust is a private voluntary organization whose mission is to preserve and protect open spaces, scenic views, forests, agricultural lands, habitats, watersheds, riparian corridors, wetlands and shorelines in the San Juan Archipelago.

#### **Board of Trustees**

##### *Decatur Island*

Nick MacPhee

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Eliot Scull

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Andy Wickstrand

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##### *Executive Director*

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Sven Haarhoff

##### *Office Manager*

Sheri Miklaski

##### *Director of Stewardship*

Dean Dougherty

##### *Education and Volunteer Coordinator*

Kathleen Foley

#### **Legal Counsel**

Julian C. Dewell

## *26<sup>th</sup> Annual Report*

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walking trail system that provides sweeping, unobstructed views over Vancouver Island, the Olympic and Cascade mountain ranges, and numerous islands and waterways in between.

We celebrated our 25<sup>th</sup> anniversary in style, holding events throughout the islands that included a world-class chamber music performance on Orcas, progressive conservation tours on Lopez and San Juan, and a harvest picnic on Waldron. We are grateful to the attendees and to the many volunteers who made these enjoyable and well-attended events possible.

Our four-month "Campaign for the Endowment" fundraising effort was an unqualified success. Our members donated over \$117,000 to the campaign, far surpassing our \$100,000 goal. With an additional private foundation gift received at the year's end, we almost doubled the size of our endowment in 2004 and, in the process, brought significant attention to our long-term objectives.

As promised, we delivered a conservation plan at the end of 2004 that will guide our work for many years to come. While we are still digesting our findings into both priorities and policies, this plan — which includes extensive geographical information systems (GIS) mapping and synchronizes our conservation activities with our mission — is already helping us to allocate resources and prioritize opportunities.

Two longtime staff members left the Preservation Trust in 2004. Both Ruthie Johns and Mike Cooper made tremendous contributions to both this organization and to the future of our islands. After several months working at half strength, we added two new staffers (Kathleen Foley and Sven Haarhoff) who have injected creative energy and fresh perspectives into our efforts.



**Trustee Alan Davidson and Executive Director Tim Seifert discuss plans for the new Mt. Ben Preserve on San Juan Island.**

Financially, it was another good year. A large bequest and foundation gifts lifted our total unrestricted financial support in 2004 above all previous annual levels. That said, our general membership contributions are down slightly from 2003. Given the many fundraising initiatives we had underway in 2004, this dip should come as no surprise, but we nevertheless depend upon a growing membership to provide critical operational support and to expand our reach into the community.

In addition to our active land conservation and stewardship programs, we are focused these days on projects that will cultivate and expand our revenue sources, elevate our public profile, and strengthen the integrity of our work. We are also initiating an exciting acquisition campaign (watch for the announcement in our next newsletter), and we're formalizing a new volunteer program that will tap into our talented membership to expand the scope of our capabilities and accelerate the pace of our work.

As we close the books on 2004 and our silver anniversary, we remain both optimistic and sobered by the challenges that we face in the San Juans. The pressures associated with the popularity of our islands are escalating, but we can see immediate opportunities to build a significant and lasting legacy. We hope you'll continue to stand with us as we negotiate these next 25 years. ■

# Rugged Orcas Island Parcel Donated to Trust

Rising from the lowland to the north of East Sound on Orcas Island sits rocky dome-shaped Buck Mountain. It is there that the Preservation Trust recently protected a rugged seven-acre forested parcel, thanks to a generous donation from Norman Rose of Portland, Oregon. The property has never been developed, and now, under Preservation Trust ownership, it will remain an undisturbed refuge for wildlife.

The property consists of ridges interspersed with salmonberry-blanketed rock-slide areas. Where the footing is surer there are maturing firs and big alders that

are past their prime. The alders are losing their branches, and their softening wood provide attractive habitat for Orcas Island's many woodpeckers. The alders also harbor many tiny insects, and in late winter, mixed flocks of ruby-crowned kinglets, golden-crowned kinglets, and chestnut-backed chickadees were found gleaning the bugs off their bare branches.

Massive stumps with springboard cuts and remnant old-growth firs are evidence that this area used to be part of a more mature forest. Perhaps the slopes gave way after the big trees were removed and their roots, which held the slope together, rot-

ted away. Some relatively large yew trees also inhabit the property. The yews, which are locally uncommon, are often found on steep slopes, and one large specimen can be found growing practically horizontally off a ridge, its red-barked roots visibly grabbing hold of the ground.

The Trust is honored to have the opportunity to watch over this property. Our plan is to let the land continue to recover from past logging, and to keep it as attractive a home as possible for the forest denizens — deer, raccoons, songbirds, and insects. ■

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## An Open Letter to Our Members

Dear Preservation Trust Member,

There is a storm developing in Washington, D.C., that could dramatically affect the future work and effectiveness of all land trusts in this country, including our San Juan Preservation Trust.

On January 27, a report released by the federal Congressional Joint Committee on Taxation recommended dismantling tax deductions for landowners who voluntarily donate land or conservation easements on their land. To understand the effect of that potentially devastating change, you should know that approximately 94 percent of all the land protected by the Preservation Trust over our 25 years of activity has come to us in the form of donations. We understand that the donors of these lands and easements have been motivated by a love for the islands and a desire to protect their land, but we also know that the accompanying tax deductibility has enabled many more people to donate than would have otherwise been possible.

As increasing popularity and development threaten much of what makes our islands so special, the desire and ability of private landowners to continue to donate

land and easements play an ever more central role in the protection of our precious landscapes and unique qualities of life. With state and federal budgets limiting government purchases of conservation land, land trusts like the Preservation Trust have proven that private landowner incentives provide one of the most efficient ways to conserve our natural legacy at minimum public cost. This approach effectively leverages public funds with our private dollars and expertise to pursue public conservation goals and encourage charitable gifts, all the while respecting private property rights *and* keeping the land on our public tax rolls.

Unlike environmental organizations that engage in political lobbying activities, the private and voluntary conservation work of the Preservation Trust has appealed to a broad spectrum of political persuasions (from red to blue, and the many shades in-between). We have learned to value this diversity within our membership, and have made every effort to keep the Preservation Trust apolitical and removed from the partisan arena. This letter represents a rare exception to this policy, and is occasioned only because this proposed erosion of tax deductibility for both gifts of land and conservation

easement donations will, if adopted, seriously undermine our central mission to conserve land in the San Juan Archipelago.

If you are interested in discovering more about the present situation, we encourage you to review the details of the Joint Committee on Taxation Report, along with the Committee's recommendations, by visiting the Land Trust Alliance's web site ([www.lta.org](http://www.lta.org)). While land trusts around the country are making contact with key political leaders to articulate the devastating impact of these proposed changes on the future of conservation, we think it will ultimately be the individual actions of our collective members that will make the real difference. ■

Sincerely,

Karin Agosta, President  
Tim Seifert, Executive Director

*Note: The San Juan Preservation Trust is a member of the Land Trust Alliance (LTA), a collection of more than 1,500 nonprofit land trusts. The Preservation Trust has adopted LTA's "Land Trust Standards and Practices," a statement of principles that provide ethical and technical guidelines for the responsible operation of a land trust.*

## ABBREVIATED STATEMENTS OF FINANCIAL POSITION

As of December 31  
(in 000's)

These abbreviated financial statements are derived from the fully annotated financial statements submitted to the board of trustees. The financial statements for 2003 were audited by Sanders & Sanders, CPA, in whose opinion they "present fairly, in all material respects, the financial position of the San Juan Preservation Trust as of December 31, 2003." The financial statements for 2004 will be audited later this year.

At year-end 2004, the Preservation Trust held 169 conservation easements and owned 35 preserves. Total area under Trust stewardship was 9,722 acres on 17 islands throughout the archipelago, including 22 miles of shoreline.

|   | 2004             | 2003             |
|---|------------------|------------------|
| <b>ASSETS</b>                             |                  |                  |
| Cash                                      | \$ 4             | \$ 5             |
| Pledges & other receivables               | 105              | 184              |
| Investments                               | 5,279            | 4,852            |
| Conservation land                         | 8,069            | 8,069            |
| Other                                     | 40               | 30               |
| <b>TOTAL ASSETS</b>                       | <u>13,497</u>    | <u>13,140</u>    |
| <b>LIABILITIES</b>                        | <b>20</b>        | <b>10</b>        |
| <b>NET ASSETS</b>                         | <b>13,476</b>    | <b>13,130</b>    |
| <b>TOTAL LIABILITIES &amp; NET ASSETS</b> | <u>\$ 13,497</u> | <u>\$ 13,140</u> |

## ABBREVIATED SUMMARY OF ACTIVITIES

For the Years ended December 31  
(in 000's)

|  | 2004          | 2003            |
|--|---------------|-----------------|
| <b>SUPPORT AND REVENUE</b>   |               |                 |
| General contributions, grants, fees, & other                                     | \$ 386        | \$ 280          |
| Bequests (for unrestricted purposes)   | 229           | 83              |
| Gifts of land  |               | 141             |
| Investment income  |               |                 |
| Interest and dividend income   | 91            | 57              |
| Net realized gains (losses) on investments                                       | 13            | 92              |
| Restricted contributions for land acquisition, stewardship, endowment, and other | 569           | 2811            |
|  | <u>1,288</u>  | <u>3,465</u>    |
| Net unrealized gains (losses) on investments                                     | 97            | 89              |
| <b>TOTAL SUPPORT AND REVENUE</b>   | <u>1,385</u>  | <u>3,554</u>    |
| <b>EXPENSES AND ACQUISITIONS</b>   |               |                 |
| Conservation programs  | 292           | 305             |
| Administration and fundraising   | 84            | 94              |
| <b>TOTAL EXPENSES</b>  | <u>376</u>    | <u>399</u>      |
| Land and conservation easement acquisitions                                      | 663           | 640             |
| <b>TOTAL EXPENSES AND ACQUISITIONS</b>   | <u>1,039</u>  | <u>1,039</u>    |
| <b>NET RESULT</b>  | <u>\$ 346</u> | <u>\$ 2,515</u> |

# 26<sup>th</sup> ANNUAL MEETING OF THE SAN JUAN PRESERVATION TRUST

You are cordially invited to the  
26<sup>th</sup> Annual Meeting of the San Juan Preservation Trust  
Saturday, April 23<sup>rd</sup>, 2005 at 10:30 am  
Lopez Center for Community and the Arts, 204 Village Road, Lopez Island, WA

## AGENDA

Welcome and Introductions

Brief Reports

2004 RETROSPECTIVE: A SLIDE PRESENTATION

Volunteer Acknowledgement

Lunch

Tour of Protected Working Farms on Lopez Island

### Ferries to Lopez:

|                |         |
|----------------|---------|
| From San Juan  | 8:25 AM |
| From Anacortes | 8:50 AM |
| From Orcas     | 9:15 AM |
| From Shaw      | 9:30 AM |

### Ferries leaving before the tour:

|                |          |
|----------------|----------|
| To Shaw, Orcas | 12:45 PM |
| To San Juan    | 1:10 PM  |
| To Anacortes   | 1:35 PM  |

### Ferries leaving after the tour:

|                      |         |
|----------------------|---------|
| To Shaw, Orcas, S.J. | 3:45 PM |
| To Anacortes         | 4:55 PM |

## LUNCH RESERVATIONS

Please reserve \_\_\_\_\_ place(s) for

\_\_\_\_\_ Enclosed is \$15 per person to help cover luncheon costs.

\_\_\_\_\_ I would like a vegetarian lunch.

\_\_\_\_\_ I need transportation to and from the Lopez ferry dock.

Please detach & mail to: SJPT, Box 327, Lopez Island, WA 98261

– or –

Call the Trust at 360-468-3202 to make reservations.

**RESERVATION DEADLINE: April 19, 2005**

# Candidates for the Board of Trustees

The Trust's bylaws provide that the Nominating Committee for candidates for the board of trustees of the San Juan Preservation Trust be made up of three trustees and two Trust members. This year's Nominating Committee includes trustees Harvey Himelfarb (Orcas), Chair; Debra Clausen (San Juan); Ivaly Hoedemaker (Lopez); and Trust members Carolyn Haugen (San Juan) and Rachel Adams (Orcas).

The Nominating Committee is pleased to submit the following slate of candidates to our membership. Please review these short profiles, then complete and mail in the ballot (below).

**David Ashbaugh** is a retired surgeon and Professor Emeritus at the University of Washington. He has served on numerous boards and serves as Chair of the Library Board on Lopez Island.

**Roger deRoos** is a Professor Emeritus of biology at the University of Missouri and teaches the general biology course at Skagit Valley College-San Juan Center. He and his wife, Carolyn, have owned property on San Juan Island since 1969.

**Fred Ellis** is a retired professor of philosophy and history, and has owned property on Shaw Island for more than 40 years. He is an advocate of the preservation of natural resources, and his appreciation of the unique local marine research opportunities is widely known.

**Alan Fritzberg** is a retired chemist and former faculty member at the Universities of Colorado and Utah. He co-founded NeoRx Corp., a biotechnology firm in Seattle, and has overseen the development of radiopharmaceuticals for kidney imaging and cancer detection. Now a resident of Orcas Island, Alan has dedicated numerous hours of volunteer work in support of the San Juan Preservation Trust.

**Charles Givens** retired to Lopez Island from a varied career as a draftsman, industrial photographer, printing and publishing busi-

ness owner, and retail business owner. He is presently serving on the board of the Lopez Island Historical Society as its vice president. He considers the Preservation Trust to be the best way to help preserve the ambiance and natural beauty of our islands.

**Will Hamilton** of San Juan Island is a consulting forester who has assisted many landowners in the San Juan Islands in the practice of good forest stewardship and conservation. He has a strong interest in better connecting the people of these islands with their unique natural environment. Will serves as a trustee of the Western Washington University Foundation.

**Dale Hazen** is a retired TV broadcasting executive from Yakima. A civic leader with United Way and Providence Medical Center, he has a keen interest in preserving the beauty and integrity of the islands.

**Sara Longworth** of Fidalgo Island is a retired CIO with more than 20 years experience in the financial services industry. She has been consistently active in community education and non-profit organizations. Sara is enthusiastic about the effectiveness of the Trust in protecting the beauty and ecosystems of the islands, particularly because many of the opportunities for conservation are unique, time-sensitive projects.

**Mary Riveland** is the great-granddaughter of Lopez homesteaders. She served as director of four Washington state government agencies, including the Department of Ecology. She and her husband, Chase, have a consulting business on Orcas Island.

**Joseph Todd** of San Juan Island is a graduate of Duke University, and a retired CPA who spent more than 25 years in public accounting. He has served on numerous professional committees and non-profit boards, including the Executive Committee of the San Juan Community Theatre. He hopes to help the Trust achieve its mission of protecting the unique qualities of our islands. ■

## Trustee Candidates

*Lopez:* David Ashbaugh\*

Charles Givens

*Orcas:* Alan Fritzberg\*

Mary Riveland\*

*San Juan:* Roger deRoos\*

Will Hamilton

Joseph Todd

*Shaw:* Fred Ellis\*

*Fidalgo:* Dale Hazen\*

Sara Longworth

\* Incumbent candidate

## THE SAN JUAN PRESERVATION TRUST 2005 MAIL BALLOT

**Voter #1**

All Candidates

Withhold vote for \_\_\_\_\_

**Voter #2**

All Candidates

Withhold vote for \_\_\_\_\_

Signature \_\_\_\_\_ Date \_\_\_\_\_

Signature \_\_\_\_\_ Date \_\_\_\_\_

Please cut out ballot and mail to us by April 14<sup>th</sup>  
at Box 327, Lopez Island, WA 98261

# Volunteer Program Gets a Lift



Henry Island neighbors and Trust volunteers Vaho Rebassoo, Maura O'Neill, and Tom Morris take a break from estuary restoration work at the Mosquito Pass Preserve.

The Preservation Trust is happy to announce the beginning of a formal volunteer program. For years, generous, energetic, and enthusiastic supporters have played an important role in the Trust's success. Recently, because of our expanding conservation efforts and the growing number of people who want to support our work, we are adding structure to our volunteer program. The first step was to hire part-time Education and Volunteer Coordinator, Kathleen Foley, who is busy recruiting volunteers from all the San Juan Islands.

Kathleen has developed a set of volunteer jobs that vary in degree of commitment and responsibility. For those Trust members who have previously volunteered with us, many of the positions you filled remain — they're just a bit more refined and defined. In addition, a number of new positions have been created.

"Our goal is to provide volunteers with an enjoyable, interactive experience," said Kathleen. "We value our volunteers, and want to make sure we employ them wisely and show our appreciation for their time and efforts. We also want to make sure our volunteers feel productive and enlightened in some fashion."

We welcome active participation from our members, so please consider helping us this spring and summer with our various programs — you're guaranteed to have a good time. At some point in the future we will appeal to the broader public to encourage others to take advantage of our volunteering opportunities so that our program continues to grow, and that our efforts to protect our beautiful islands can continue.

To keep our records current, past and present Preservation Trust volunteers that would like to continue to help us are urged to complete a volunteer application indicating your areas of interest. Both current and past volunteers, and those of you interested in joining us as a volunteer for the first time, can obtain an information packet that includes a list of job descriptions and a volunteer application by contacting Kathleen Foley at 360-468-3202, or by sending an email to [kathleenf@sjpt.org](mailto:kathleenf@sjpt.org). ■

## MEMORIAL AND OTHER GIFTS

### IN MEMORY OF

*Cleve Vandersluys*

Roger and Carolyn deRoos

*Allen & Jeanclaire Salisbury*

Roger and Carolyn deRoos

*Betty Whitridge*

Alan and Janet Davidson

### IN HONOR OF

*Rachel Adams' Birthday*

DD Glaze and Gwen Crawford

*Wendy Lawrence & Todd Morgan's Engagement*

Lynda Yankaskas

Kendra Liddicoat

*Alan & Janet Davidson's 50<sup>th</sup> Anniversary*

Bill and Sarah M. Ovens

*The Alexander Family*

Allan and Kendra Daniel

*Margie Roe*

Bill Associates

## BUSINESS/FOUNDATION

Schwab Fund for Charitable Giving

The Seattle Foundation

Microsoft Matching Gifts Program

Brooding Heron Press & Bindery

# THE SAN JUAN PRESERVATION TRUST

*Conservation Easements, Land Protection, Education & Stewardship*

Box 327 Lopez Island, WA 98261 T. 360.468.3202 www.sjpt.org

Non-Profit Organization

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## INSIDE

26<sup>th</sup> Annual Meeting Announcement  
Trustee Mail-in Ballot  
Hillside Donation on Orcas Island  
Call for Volunteers

## 2005 EVENTS CALENDAR

|              |         |  |          |
|--------------|---------|--|----------|
| April 23     | Sat     | 26 <sup>th</sup> Annual Meeting                | Lopez    |
| April 30     | Sat     | Lopez Island Wildflower Walk                   | Lopez    |
| May 14       | Sat     | San Juan Island Wildflower Walk                | San Juan |
| May 18       | Wed     | Turtlehead Hike                                | Orcas    |
| May 28       | Sat     | Orcas Island Wildflower Walk                   | Orcas    |
| June 8       | Wed     | Waldron Island Conservation Lands Tour*        | Waldron  |
| June 18      | Sat     | Stuart Island Conservation Lands Tour*         | Stuart   |
| June 24      | Wed     | Mt. Ben Preserve Hike                          | San Juan |
| July 8       | Fri     | San Juan Island Conservation Tour by Bicycle** | San Juan |
| July 13      | Wed     | Henry Island Conservation Lands Tour*          | Henry    |
| July 23      | Sat     | Decatur Island Conservation Lands Tour*        | Decatur  |
| August 13    | Sat     | Orcas Island Conservation Lands Tour           | Orcas    |
| August 17-20 | Wed-Sat | San Juan County Fair                           | San Juan |
| August 26    | Fri     | Waldron Island Conservation Lands Tour*        | Waldron  |
| August 27    | Sat     | Kayak Tour of Wasp Island Conservation Lands * | Wasp     |
| September 17 | Sat     | Scotch Broom Pull, Peach Preserve              | Guemes   |
| November 12  | Sat     | Winter Birds of Orcas Island                   | Orcas    |

\*Indicates Fee \*\* BYOB - Bring Your Own Bicycle

Space is limited and early sign-up is encouraged. Please call 360-468-3202