

2013 ANNUAL REPORT



To preserve and protect our natural and historic heritage



www.HeritageConservancy.org



“For most of history, man has had to fight nature to survive; in this century he is beginning to realize that, in order to survive, he must protect it.”
- Jacques-Yves Cousteau



Heritage Conservancy is committed to being the region’s premier, nationally accredited conservator. We are a community-based organization dedicated to the preservation and protection of significant open spaces, natural resources, and our historic heritage. A champion of conservation best practices, Heritage Conservancy believes that everyone is responsible for stewardship and seeks to enlighten, engage, and empower others to help achieve this mutual vision.

Since 1958, Heritage Conservancy’s mission has been to preserve and protect our natural and historic heritage. Learn more by visiting us online at www.HeritageConservancy.org.

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As part of our Green Path Forward, this publication has been printed on recycled paper.

Many Faces; One Voice

*A Message from Heritage Conservancy's Senior Leadership Team:
President, Chief Operating Officer, and Chairman of the Board*

*S*imply put: Heritage Conservancy would not exist without your support. We exist *because* of you, and we exist *for* you. Because you care about the integrity of our open spaces and historic places, you allow us to make a lasting difference for the benefit of our entire community. Now in our 55th year in operation, we continue to protect the irreplaceable natural and historic resources that help to improve our region's quality of life.

In 2013, we focused strongly on connecting the next generation of stewards to the environment. The William Hart Rufe III Legacy Fund enabled us to support our interns as we assisted them in developing a better understanding of the importance of conservation and their crucial role in it. We also held our first-ever BioBlitz at Bristol Marsh, which allowed middle school and high school students to discover and document various species of plant and animal life living in the marsh. This educational engagement created excitement for this unique ecological resource that these children have right in their own backyard.

We made significant contributions to the protection of our natural resources this year as well. We assisted in preserving the Hoffman property, which is located in the Cooks Creek Watershed and adds to the over 1,300 acres of contiguous preserved land in the area, and we preserved the last piece of the Metzger farm, which now totals nearly 290 acres of protected property. We also started work on restoring a trail on the Fuller Preserve that became damaged due to Hurricane Sandy. Once complete, this trail will provide passive recreation for local residents in an area that does not currently have much accessible parkland.

We held our annual Farm to Table, Art of Preservation, and Christmas at Aldie: three fundraisers that brought together hundreds of concerned community members who share a passion for conservation and the protection of our region's open spaces. A focus on locally-grown food and sustainability had guests rallying behind a cause that affects us all.

At the end of 2012, we announced the pending merger of our organization with The Conservancy of Montgomery County (CMC). The merger was completed this year, so we welcomed over one hundred CMC members to the Heritage Conservancy family. We also acquired numerous conservation and historic building facade easements and now serve to protect important open spaces and historic structures for the community in Montgomery County.

With so many accomplishments in 2013 as a result of your support, we enter into a new year with an even more determined plan. How can we better serve the needs of our community and keep the promise that we will protect this area's heritage for generations to come? As we develop programs that engage, enlighten and create a connection to nature, we will have you, our supporters, in mind. As you read this report, let it be a testament to what your generous support has helped us to achieve.

Thank you,

Linda J. Cacossa
Chief Operating Officer

Jeffrey L. Marshall
President

Marvin L. Woodall
Chairman of the Board

*From L to R: Jeffrey Marshall,
Marvin Woodall, and
Linda Cacossa, Heritage
Conservancy's Senior
Leadership Team*



Community Engagement

A BIOBLITZ AT BRISTOL MARSH

One of our proudest accomplishments in 2013 was holding our first-ever BioBlitz on May 17th at the Bristol Marsh in Bristol, PA. A BioBlitz is a 24-hour ecological survey during which teams work together to discover and document as many species of plant and animal life as possible to better understand an area's ecosystem. The event brought together volunteer scientists, naturalists, students, teachers and community members to recognize the importance of biodiversity in the significant habitat of the Bristol Marsh Preserve.

Located along the Delaware River just southwest of the historic district of Bristol Borough, the Bristol Marsh is a 33-acre natural area preserved by The Nature Conservancy, Bristol Borough and Rohm and Haas (now The Dow Chemical Company) and locally managed by Heritage Conservancy. The Preserve contains a unique freshwater tidal marsh and forest habitat that helps to filter water before it enters the connecting Delaware River and helps to prevent stream bank erosion.

With a full schedule of educational programs that included an afternoon bird walk, a discussion about freshwater tidal marshes, and hands-on discovery of plant and animal life living in the Bristol Marsh, community members and volunteers who attended the BioBlitz took away with them a deeper understanding of the significant ecological resource that we have right here in Bucks County.

At the close of the 24-hour BioBlitz, over 350 different species of plants, birds, insects, aquatics, mammals, amphibians and reptiles were discovered and documented. The Water Pimpernel,



a recommended threatened plant in Pennsylvania, the Short-awned Foxtail, a recommended rare plant species in Pennsylvania, the Red-bellied turtle, a threatened species in Pennsylvania, and native and migratory bats that fill crucial roles in our ecosystem were among some of the significant discoveries. The findings of the BioBlitz will guide management decisions about how to best conserve and protect the natural resources within the Bristol Marsh Preserve.

Susan Myerov, then coordinator of the BioBlitz for Heritage Conservancy, commented on the dedication of the volunteers that helped to ensure the event's success. "I was so impressed by the work of our volunteer scientists, who brought their technical expertise and specialized equipment to both survey and record their findings. I was equally impressed by the local students who enthusiastically assisted the science teams and learned so much about scientific survey and recording methods."



EXPANDING OUR REACH

In December 2012, we announced that The Conservancy of Montgomery County (CMC) would merge all of its programs and conservation easements with Heritage Conservancy, becoming

an important strategic element in a larger, stronger organization. The merger was finalized this past year, and we welcomed over one hundred CMC members to the Conservancy family. Through this union,

we acquired eleven conservation easements totaling 126 acres in Montgomery County, PA, as well as several historic building facade

easements and their historical research project and stewardship funds. We assumed responsibility for monitoring and upholding these conservation and facade easements in Montgomery County.



In November, we installed new Heritage Conservancy signage on the properties that we acquired through the merger. These signs will draw attention to the beautiful resources that residents have in their county and show how we are making a difference in the community.

We will continue to monitor these properties to ensure that they follow easement guidelines and are protected in perpetuity for the enjoyment of all Montgomery County residents and visitors.

Shaping Future Generations of Stewards

THE WILLIAM HART RUFÉ III LEGACY FUND

If you've taken a look at the list of our Board of Directors, you might have noted the name of William Hart Rufe III, our Chairman Emeritus. Judge Rufe earned this distinction through his more than 30 years of dedicated service to Heritage Conservancy. In 1974, the Conservancy had no employees, no office, and a \$1,200 annual budget. For years, Judge Rufe worked hard to build Heritage Conservancy into a strong and credible regional land trust. As past president and Chairman of the Board, he guided the Conservancy from its humble beginnings of renting its first office space and hiring its first employees through milestones such as the restoration of our historic Aldie Mansion headquarters (a then almost derelict building with no windows, no heating or air conditioning, and no place for parking) and the national accreditation by the Land Trust Accreditation Commission. Judge Rufe's legacy at Heritage Conservancy continues to serve as a beacon of inspiration for the work that we do.

In honor of Judge Rufe's years of service, the William Hart Rufe III Legacy Fund was created to support our internship program. This donation-based fund gives student interns the opportunity to grow in their area of study while gaining valuable hands-on experience at Heritage Conservancy. In 2013, we were fortunate to host five interns who logged a total of over 650 hours volunteering with us.

Our wonderful group of interns over the past year consisted of Tori Alpaugh, Sabrina Britt, Bridget Murray, Marissa Smith, and Taylor Thompson. Tori is on path to graduate from Washington College in 2016 where she studies Environmental Science. Over the summer, she worked within our Properties & Programs Department to learn about the process of monitoring preserved properties and participate in the cleanup of trails while attaining fieldwork experience. She also helped with our Farm to Table fundraising event. Sabrina is due to graduate from Bucks County Community College in 2014 with a degree in Travel and Event Planning. She has been interning with our Development Department since September 2013. Sabrina is gaining valuable fundraising experience through Heritage Conservancy events such as Art of Preservation and Christmas at Aldie, and she acquires office experience by performing daily office tasks. Marissa attended Unity College where she received her degree in Environmental Studies. She interned with our Development Department and gained experience in grant research and writing. Bridget attends Bryn Mawr College and is set to graduate in 2017. Bridget gained

fundraising experience by assisting with our Farm to Table fundraising event, and she gained valuable insights into the daily operations of a non-profit organization as well. Her time spent at Heritage Conservancy has helped her on the path toward determining her future course of study. Taylor attends Dickinson College and will graduate this year with a degree in Environmental Studies. She worked within our Properties & Programs Department where she focused on special projects like the restoration of the Jere Knight Trail, the identification of invasive plant species, and monitoring of our properties.

The William Hart Rufe III Legacy Fund helps to shape our younger environmental stewards as they connect with nature and learn about the importance of protecting and preserving our natural and historic heritage during their time spent with us. Investing in the next generation of stewards will help to build a stronger future for our community, as they will be entrusted with continuing the legacy of protecting the open spaces and unique historic resources of our region.



Above: Sabrina Britt assists with daily office tasks around Aldie Mansion.



Right: Bridget Murray promotes the silent

auction during our Farm to Table fundraiser.

Below: L to R: Tori Alpaugh, August Mirabella, a noted ornithologist, and Taylor Thompson discover wildlife up close.



Preserving Our Natural Resources



WILD PLANT SANCTUARY AT QUAKERTOWN SWAMP

When several rare plant species were found on a property within the Quakertown Swamp, one of our Lasting Landscapes® in Upper Bucks County, we contacted The Department of Conservation and Natural Resources (DCNR) to see what we could do to better protect them. Through our Lasting Landscapes® initiative, we identify and map significant landscapes containing both natural and historic resources and then develop and implement protection techniques to sustain the resources' integrity. Contacting DCNR was a step toward implementing the protection of these plants on the property. We are pleased to share that after applying for recognition, DCNR designated this property as a Wild Plant Sanctuary. This designation as a Wild Plant Sanctuary further establishes the protection of our natural resources!

The Department of Conservation and Natural Resources created the Wild Plant Sanctuary program to formally commend landowners for conserving and enhancing native wild plants and communities. Only 14 properties in the state of Pennsylvania are recognized as private Wild Plant Sanctuaries. According to DCNR, in order to be eligible for Wild Plant Sanctuary status, a property must meet one or more of the following criteria: it must support plants that are rare,

threatened or endangered in PA; contain host plants for rare moths, butterflies or insects; include outstanding or unique natural features or plant communities; be maintained and managed using ecologically sound practices; be located on lands not state or federally owned.

Thanks to the discovery of several rare plant species on this property, our Wild Plant Sanctuary will benefit from professional consultation through DCNR. We will receive assistance with a management plan for the site; once this is put into effect, we will follow the plan, and the property will receive ecological check-ups to ensure that we are doing everything we can to keep these plants thriving.

“The Wild Plant Sanctuary at Quakertown Swamp contains a diverse array of habitats, including early successional field, deciduous forest, and buttonbush wetland,” said Jason Ryndock, Ecological Information Specialist for DCNR. “It is an excellent example of how a piece of our fragmented landscape has managed to hold on to its biodiversity and will continue to support state-listed species in the future with the adoption of ecologically-minded management practices.”

RESTORATION OF THE FULLER PRESERVE

The Fuller Preserve, a 65-acre property owned by Heritage Conservancy, is located along Slifer Valley Road in Springfield Township, PA. The preserve consists of a reverting field, meadow, an American Chestnut tree nursery, a forest in several stages of growth, and a tributary to Cooks Creek.

This diverse property also contains the Jere Knight Nature Trail, which was previously used for a tree identification walk. Jere Knight, wife of novelist Eric Knight who wrote *Lassie Come Home*, was a strong advocate for open space in Bucks County. Heritage Conservancy is in the process of restoring this 1.2-mile trail that became damaged largely due to storms such as Hurricane Sandy. Thanks to the assistance from neighbors, volunteers and local residents, the restoration and clean-up has already begun. Once trail restoration is complete, small signage

on some of the varieties of tree species along the trail will be added for a self-guided tree identification walk.

A unique feature of this trail is an American Chestnut nursery. Prior to the 20th century blight that destroyed a large part of the American Chestnut population, the species had been a main presence in forests throughout the country. Heritage Conservancy has begun work in partnership with the American Chestnut Foundation to rebuild the species by planting a nursery of blight-resistant Chestnut trees on the Fuller Preserve.



In November 2013, we performed a preliminary evaluation for a stream bank restoration project located on the Fuller Preserve. The stream bank in focus serves as a riparian buffer, which is a dense area of trees and shrubs that helps to filter pollutants that might otherwise wash into surface and ground water. Some of the natural buffer area has eroded and is in need of restoration. We are working with the Cook Creek Watershed Association and Princeton Hydro to secure funding to get this crucial project underway.

By opening the Fuller Preserve to the public in the future, we hope to create opportunities for the local community to connect with nature and enjoy all that the preserve has to offer.





ANNUAL GARDEN PARTY 2013

THE RECIPIENTS OF THE 2013 HERITAGE PARTNERSHIP AWARDS

The awards recognize individuals and organizations that have made significant contributions to land and historic preservation, environmental protection, and quality of life efforts that help to make a difference in our community.

LAND CONSERVATION AWARD

Alida Spry and Devich Farbotnik of Nockamixon Township received this award for the preservation of their 88-acre property. Over ten years ago, their father, Steve Farbotnik, had considered placing a conservation easement on his property that would protect the integrity of the land and wildlife for generations to come. Mr. Farbotnik passed away before completing the easement, so Devich and Alida made it their mission to carry out their father's wishes to see the property preserved. With obstacles hindering a fast path to preservation, it took the brother and sister team seven dedicated years before completing a conservation easement on the property in January 2013. Alida thanked Heritage Conservancy for the award with a heartfelt speech about her strong connection to the land. She recalled how when she was just four years old, her father used to wake her up at 3:00 in the morning to go owl watching. She had no idea until she started school that this wasn't a normal occurrence for most children! It was shared experiences like this with her father that helped to shape her deep appreciation for the environment. Alida noted that she and Devich felt their father's presence with them every step of the journey. Ten years after his idea was first conceived, their father's dream of protecting his land had finally been realized.

L to R: Heritage Conservancy's Senior Land Conservationist, Laura Baird, Alida Spry, Devich Farbotnik, and Chairman Emeritus of Heritage Conservancy, William Hart Rufe III



HISTORIC PRESERVATION AWARD

Jim Snow received this award for his participation with the Friends of Bolton Mansion. Jim has shown continuous dedication and commitment in preserving the historic heritage of Bolton Mansion since the 1970s. By engaging the public through exhibits and programs, he has helped to further the legacy of the mansion's original owner, Phineas Pemberton, who was an influential Quaker leader, a close friend to William Penn, and one of the framers of the Pennsylvania Constitution. After receiving the award, Jim expressed his gratitude toward Heritage Conservancy as well as his fellow volunteers who help to preserve the important history of Bolton Mansion for the enjoyment of all.



Above: L to R: President of Heritage Conservancy, Jeffrey Marshall, with award recipient, Jim Snow

REACHING NEW LEVELS

The four levels of recognition represent the cumulative giving of our major donors. These names can be seen on our Donor Recognition Wall located in the front courtyard at our Aldie Mansion headquarters. Each year, we add new names or move names to higher levels to reflect the current sum of their generous donations. The following names were newly added or moved higher this year.

HERITAGE CLUB

Johnson & Johnson Family of Companies
Drs. Eric and Maria Rieders

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Bucks County Conservation District
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Mr. and Mrs. William F. Hecht
Hill Wallack LLP
Mr. and Mrs. Lawrence Smith
Mr. and Mrs. Robert L. Sproat
Univest Bank and Trust Co.

THE MISSING PUZZLE PIECE

In our 2012 Annual Report, we informed you of the exciting news that we had recently facilitated in finalizing the second-largest farm preservation project in Bucks County. The Metzger Farm, a prominently located 250-acre property full of cultivated farmland, pastures, and equestrian facilities located in Springfield Township, came a long way through an arduous negotiation process that lasted over four years. Despite the success in preserving the 250 acres, the puzzle was not complete; an adjoining 35 acres of the Metzger property had yet to be preserved.

Mr. Metzger had the original 250 acres ranked for the County Agricultural Preservation Program. Due to its high agricultural ranking, it was easier to find funding for this farm. Although it included valuable riparian land, the remaining 35 acres had a lower agricultural ranking so it proved difficult to place an agricultural easement on this parcel. By not placing an easement on this piece of the property, the zoning would have allowed for subdivision and development of the land. Since Mr. Metzger's decision to preserve his property was contingent on preserving it as a whole, and since the overall appeal of the property relied on it, it was necessary to find a way to finalize an easement on the remaining 35 acres.

Thankfully, the remaining piece of land directly borders a tributary of Cooks Creek, a wild trout stream ranked as an Exceptional Value Stream by the Pennsylvania Department

of Environmental Protection. This fact made the parcel more appealing to funding programs that have a focus in protecting natural resources in the watershed. Using township and county funds as a match, we prepared an application for funding to the Open Space Conservancy to close the final gap in the funding puzzle. The Open Space Conservancy, Inc., an affiliate of the Open Space Institute, Inc. is managing the Bayshore-Highlands Fund, a \$6 million fund established with an initial grant from the William Penn Foundation, in order to protect land in the Delaware Bayshore in New Jersey and the Highlands in Pennsylvania.

The application for funding was approved by the Open Space Institute to assist with a conservation easement. Although it included valuable riparian land, the remaining 35 acres had a lower agricultural ranking so it proved difficult to place an agricultural easement on this parcel. The magnificent property consisting of nearly 290 acres will remain intact for the enjoyment of all.

“When we are all gone, untold generations of people will still drive through the township and benefit from your commitment,” said Jeff Marshall, president of our organization, in a thank-you note he wrote to Mr. Metzger on completing the preservation of his property. “You have left a positive impact on the community for which you deserve credit and accolades.”



PRESERVING THE IMPORTANT HEADWATERS OF COOKS CREEK



The headwaters of Cooks Creek on the Hoffman property.

In December 27, 2013, we finalized the preservation of a 49-acre property in Durham Township. The Hoffman property, which is located in the Cooks Creek Watershed, will be protected in perpetuity. The property adds to the over 1,300 acres of contiguous preserved land in the area.

Working as a strategic partner, we provided assistance to Durham Township throughout the process of preserving the Hoffman property. In 2010, we created an open space plan that identified important natural and agricultural resources within the Township that were high priorities for preservation. Based on the open space plan, the Hoffman property was ranked as a high priority to preserve. This ranking allowed Durham Township to seek funding for its preservation. Bucks County Municipal Open Space Program, PA DCNR, Open Space Institute Bayshore Highlands Fund, PA Land Trust Association and 1772 Foundation all provided funding for the preservation of this piece of land.

The Hoffman property contains a vital source of water: the headwaters of Cooks Creek. Had the property been left unpreserved and open to development, it could have had a profoundly negative effect on surrounding areas and their water quality. Cooks Creek is designated as an Exceptional Value Cold Water Fishery under the Pennsylvania Chapter 93 Water Quality Standards. Brown trout and brook trout, both of which are bioindicator species that can only survive

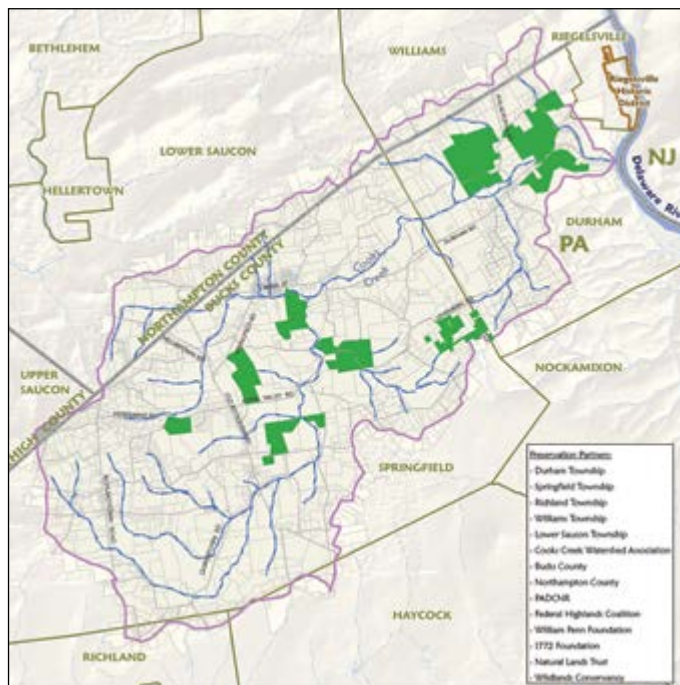
in pure cold water, breed naturally in these waters. Their survival is indicative of just how pristine this environment is.

Along with the protection of this waterway, the preservation of the Hoffman property ensures the protection of other vital natural resources. It protects a forested floodplain within the property, and it protects habitat for potentially threatened or endangered species of plants and animals. Not only does the preservation of this property safeguard important natural resources that otherwise could have been lost forever, its protection helps to preserve the rural character of Durham Township.

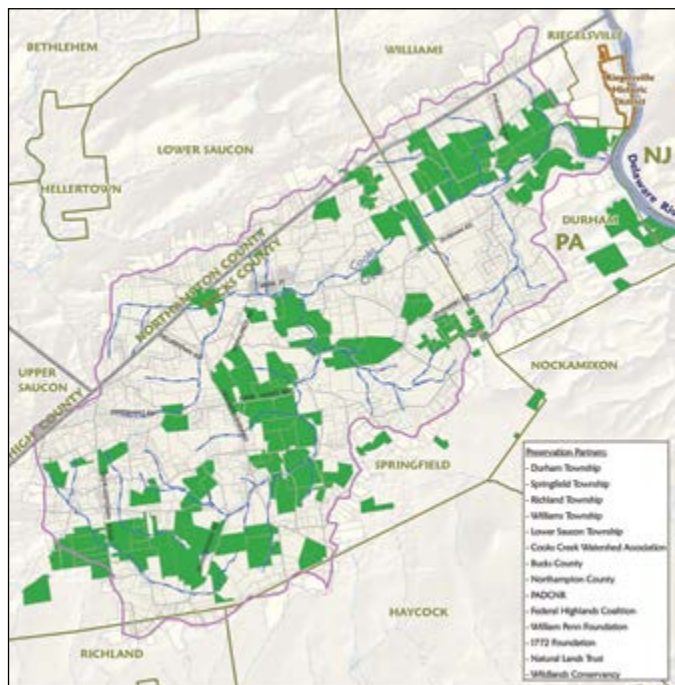
Laura Baird, Senior Land Conservationist for Heritage Conservancy who spearheaded the project, provided critical assistance to Durham Township throughout the process of preserving the Hoffman property. She recognized the importance of being able to complete this project. "Because the Hoffman property contains so many crucial natural resources and is part of a larger contiguous area of protected land, it was essential to preserve this property. If it had been left open to development, it would have left a hole in the beautiful tapestry of the landscape in the Cooks Creek Watershed. Heritage Conservancy is pleased to be able to assist Durham Township with the preservation of this exceptional piece of land."

SEEING GREEN! LOOK AT WHAT YOUR SUPPORT HAS HELPED US TO ACCOMPLISH IN THE COOKS CREEK WATERSHED

2004: 1,371 ACRES OF PRESERVED PROPERTY



2013: 5,221 ACRES OF PRESERVED PROPERTY



INDIVIDUALS

\$10,000+

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 Dr. and Mrs. Brian G. Firth
 Mr. and Mrs. Sydney F. Martin
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\$5,000 – \$9,999

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 Mr. and Mrs. Nicholas DeRose
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 Honorable and Mrs. William H. Rufe, III

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 Bucks County Conservation District
 Bucks County Natural Areas Program
 Bucks County Planning Commission
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 Doylestown Borough
 Doylestown Township
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 East Rockhill Township
 Lower Makefield Township
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CONSERVATION EASEMENTS:

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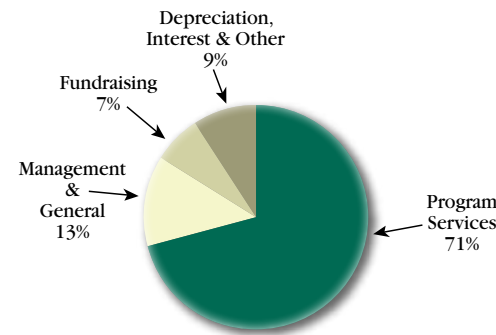
Bensalem Township
 Bristol Borough

2013 FINANCIAL OVERVIEW

Heritage Conservancy's fiscal management practices ensure that funds raised in the current year are effectively used to advance our conservation and education mission. We thank the many funding partners listed on these pages for their continuing support.

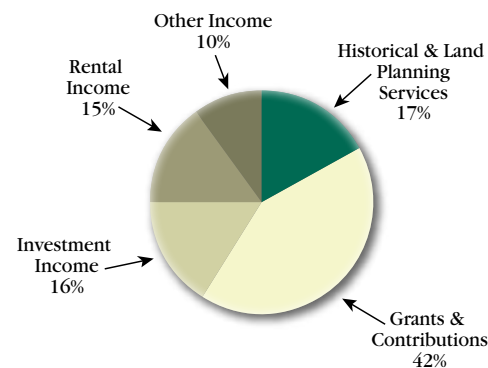
2013 EXPENSES:

Program Services	\$1,553,483
Management and General	\$296,962
Fundraising	\$149,379
Depreciation and Other	\$208,448
Total Expenses:	\$2,208,272



2013 INCOME:

Historical and Land Planning Services	\$429,915
Grants and Contributions	\$1,065,245
Investment Income	\$391,015
Rental Income	\$365,775
Other Income	\$243,041
Total Income:	2,494,991





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