

ANNUAL REPORT OF THE
Natural Heritage Trust
2014-2015

*Supporting Parks and Recreation,
Land and Water Conservation and Historic Preservation
in New York State since 1968*

The Natural Heritage Trust Annual Report presents FY2014-2015 Projects and Programs
(April 1, 2014 through March 31, 2015)



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Natural Heritage Trust



Watkins Glen State Park

The Natural Heritage Trust (NHT) is pleased to present the Fiscal Year 2014-2015 (April 1, 2014 - March 31, 2105) Annual Report. This report highlights ways the NHT secured and raised financial support, ranging from small donations to large corporate gifts and sponsorships. We are proud to report on the many ways these resources support parks, recreation, cultural, land and water conservation and historic preservation purposes throughout the State of New York.

The support of our donors and friends over the year proved especially important as the Office of Parks, Recreation and Historic Preservation (OPRHP), the Department of Environmental Conservation (DEC), and the Department of State (DOS) have been proactive in collaborating and identifying new partnerships and private support to leverage state resources. Private funding through the NHT provided vital support for a variety of agency projects and programs.

At the close of the year, the NHT held just over \$32 million in trust. During FY2014-2015 the NHT expended approximately \$7.9 million in support of programs and projects throughout the State, while at the same time receiving just over \$11.6 million from a variety of sources including donations, grants, corporate sponsors, programs and activities, and other fundraising initiatives.

The NHT is pleased to report that administrative costs were again held to under three percent of total assets held in trust. Moreover, the NHT does not rely directly on donated funds for administrative support; rather, the NHT retains investment income earned on these funds. In cases where the NHT receives a larger donation or grant that may be held in trust for a longer term, the NHT may invest the funds more aggressively with all investment returns, less an agreed to management fee, accruing to the benefit of the project or program supported by the donation.

This model has consistently ensured that the maximum levels of funds are spent on benefiting public resources in our parks, open spaces and historic sites. This report highlights ways in which financial resources were secured and administered by NHT to benefit public projects and programs throughout the State during FY2014-15. None of this would be possible without the generosity of the NHT's supporters. The NHT gratefully acknowledges the individuals, small businesses, corporate sponsors and contributors, and foundations that generously supported the NHT's work throughout the year.

Background and Mission



Allegany State Park

The NHT was established in 1968 as a public benefit corporation of the State of New York. The NHT is tax exempt pursuant to Section 170 (b) of the Internal Revenue Code and is a publicly supported 501(c)(3) charitable organization.



Minnewaska State Park Preserve

The NHT's mission is to receive, solicit, and administer gifts, grants and contributions in support of New York State parks, conservation, outdoor recreation, historic preservation and waterfront and community revitalization.



The NHT accomplishes its mission by accepting donations, raising funds, building public/private partnerships, and through cooperative programs and projects with its agency partners: New York State Office of Parks, Recreation and Historic Preservation (OPRHP), New York State Department of Environmental Conservation (DEC) and the Department of State (DOS). The NHT ensures the safekeeping of funds held in trust and invests such funds prudently and in a manner consistent with the designated gift, grant, program and/or project.

The Board of Directors



The NHT is governed by a Board of Directors comprised of the Commissioner of the OPRHP, the Commissioner of the DEC, the Secretary of State, and the Chair of the State Council of Parks, a statewide advisory board that provides guidance and makes recommendations on matters affecting parks, recreation and historic preservation.

Moreau Lake State Park

Rose Harvey, Chair Commissioner, Office of Parks, Recreation and Historic Preservation

Prior to her appointment as Commissioner in 2011, Ms. Harvey held multiple leadership positions with The Trust for Public Land where she oversaw all real estate acquisitions, urban park design and developments and managed the finances of a \$20 million annual operating budget. Commissioner Harvey also served as senior fellow at the Jonathan Rose Companies and a McCluskey Fellow and Lecturer at the Yale School of Forestry and Environmental Studies. She serves on the Board of the Geraldine R. Dodge Foundation and the Yale Leadership Advisory Council. Commissioner Harvey received her B.A. from Colorado College in 1977 and M.E.S. at the Yale School of Forestry and Environmental Studies in 1984.

Lucy R. Waletzky, M.D., Chair, State Council of Parks, Recreation and Historic Preservation

Dr. Waletzky has been Chair of the Taconic Region Parks Commission since 2004 and Chair of the State Council of Parks, Recreation and Historic Preservation since March 2007, and has been involved over the years with numerous committees and organizations related to natural preservation and conservation. In 2003, working to preserve the Northeast corner of the Rockefeller State Park Preserve she donated 84 acres to New York State and 10 acres to Westchester County. Dr. Waletzky received the Governor's Parks and Preservation Award in 2004 and both the State Council of Parks Commission Chair Award and Friends of Westchester County Parks Best Friend Award in 2006.

Joe Martens, Commissioner, Department of Environmental Conservation

From 1998 until 2011, Commissioner Martens served as President of the Open Space Institute, directing and overseeing land acquisition, sustainable development, historic preservation and farmland protection. Previously, Commissioner Martens served as Deputy Secretary to the Governor for Energy and the Environment from 1992-94 and before that Assistant Secretary from 1990-92. His experience includes serving as the Chair of the Olympic Regional Development Authority and Chair of the Adirondack Lake Survey Corporation. Commissioner Martens studied Resource Economics at the University of Massachusetts at Amherst and received an M.S. in Resource Management from the State University of New York, College of Environmental Science and Forestry at Syracuse University.

Cesar A. Perales, Secretary of State, Department of State

Secretary Perales has spent more than four decades as a dedicated public servant, including serving as Assistant Secretary at the U.S. Department of Health and Human Services during the administration of President Jimmy Carter, as Commissioner of the New York State Department of Social Services under Governor Mario M. Cuomo, and as Deputy Mayor of New York City under Mayor David Dinkins. Secretary Perales is a co-founder of LatinoJustice PRLDEF and established the first Brooklyn Legal Services Office. Secretary Perales earned his B.A. from City College of New York and a J.D. from Fordham Law School. Among other distinctions, he is the recipient of an Honorary Doctorate from Lehman College, the Thurgood Marshall Award from Seton Hall University Law School, the Dean's Medal from the Fordham University School of Law, and the 2009 Lifetime Achievement Award from the Hispanic National Bar Association.

Public Private Partnerships



Letchworth State Park

For over four decades, the NHT has collaborated with OPRHP, DEC and DOS to identify sources of private investment to supplement state support for our natural, recreational and historic resources. Millions of private dollars have been secured to support cultural and recreational programming, capital projects and

improvements, environmental and outdoor education, natural resource protection and restoration, and historic preservation throughout the state. The NHT is dedicated to building and sustaining relationships with private supporters to protect and enhance these important programs and projects.

Letchworth State Park Nature Center

In 2013, OPRHP joined the NHT, the Open Space Institute's (OSI) Alliance for New York State Parks, the State University of New York at Geneseo, the Genesee Commission and the Friends of Letchworth State Park to establish a public-private effort to build a Nature Center at Letchworth State Park. The much-needed facility will provide a setting for educational programming and interpretation at the popular park. The Letchworth Nature Center will be open year-round; provide a venue to educate visitors specifically about the park's natural history and existing environmental conditions; and will serve as a hub from which to venture out and enjoy the richness of the Letchworth experience. The center will feature research space, an exhibit area and meeting/classroom space.

The overall cost of the project is projected at \$6.75 million, and includes \$1 million for an endowment the NHT will manage to ensure the ongoing operation of this facility. The project is being funded by a 2:1 NY State match with \$2.1 million to be raised privately. The State's two-third share

will come from Governor Andrew Cuomo's New York Works Park Capital Improvement fund and other State grants, which include over \$1 million in grants from the Finger Lakes Regional Economic Development Council in 2013.

On May 15, 2014, the official launch of the private fundraising campaign was held at Letchworth State Park's Glen Iris Inn with NYS Lieutenant Governor Robert Duffy as the keynote speaker. Groundbreaking for the project is planned for May of 2015, with the building's expected opening to take place in late spring of 2016.



Endowments and Major Gifts



Franklin D. Roosevelt Four Freedoms State Park

As of FY2014-15, the NHT managed over \$10.2 million in long-term investment/endowment accounts. These funds are invested in a manner to meet the goal of providing an ongoing source of annual income while keeping pace with inflation. Investment earnings on these accounts support restricted projects and programs.

The NHT continues to actively expand its endowment administration. This year, the NHT added two new accounts to its endowment portfolio, including the Sampson Military Museum and the Rockefeller State Park Preserve.

Sampson State Park Military Museum

- Sampson State Park is located on the eastern shore of Seneca Lake in the Finger Lakes Region. Prior to becoming a State Park, the Federal government used the 2,000+ acres of land as a Naval training facility during World War II. After WWII, the property was used as an Air Force training facility during the Korean War.
- After the war ended, the Federal Government closed the training facility and transferred ownership of the property to the New York State Park System. Although the Park is primarily used for outdoor recreational activities such as camping and boating, the Sampson Military Museum (Museum) is also a popular destination for Park visitors. The Museum contains many collections, period archives and photos of both wars.

- For many years, the Sampson WWII Navy Veterans had a very active membership group; many of whom volunteered at the Museum on a regular basis, sharing their personal stories and experiences with visitors.



- Through membership dues and fundraising efforts over the years, the Sampson Navy Veterans built up an Endowment of over \$775,000 in support of the Museum.
- In 2014, the WWII Navy Veterans gifted and transferred their Museum Endowment to the NHT. The NHT will manage the endowment and annual distributions will be used to support the long-term operation and stewardship of the Museum. The NHT is proud to assist OPRHP by continuing to honor, preserve and share the history of the many service men and women who trained at Sampson.

Endowments and Major Gifts



Acquisitions funded by the NYS Environmental Protection Fund will add 1,687 acres – broadening the boundaries of the Minnewaska State Park Preserve to 22,881 acres.

Minnewaska State Park Preserve

- In FY2014-15, OPRHP continued with its plan to acquire several parcels of land owned by the Open Space Institute Land Trust, Inc. (OSI). The expansion will enhance the year-round recreational opportunities to New York residents and visitors, while also furthering conservation of the land features and ecosystems unique to the Preserve.
- OSI has been a long-time partner to New York State Parks and the environment. And in furtherance

of their commitment to long-term stewardship of the Preserve, OSI established a permanent Endowment with the NHT, solely for the benefit of the Preserve.

- Total contributions from OSI to NHT were over \$1.6 million and the value of the Preserve Endowment grew to almost \$1.8 million as of FY2014-15. Annual Endowment distributions will be used to support the operation, maintenance and programming at the Preserve.

Rockefeller State Park Preserve

On July 10, 2014, David Rockefeller pledged \$4 million to establish an endowment to support the operations and maintenance of Rockefeller State Park Preserve. The gift is one of the largest-ever private donations in the history of the state park system and is the largest private donation to the Natural Heritage Trust. The first payment of \$2 million was made to the NHT in December 2014, with the second \$2 million payment to be made in December 2015.

The endowment provides for the gift to be used to support stewardship, maintenance, capital improvement projects and innovative environmental programming at the Park. Rockefeller State Park Preserve is located in Westchester County and is comprised of a portion of the Rockefeller family estate in Pocantico Hills given to the New York State Office of Parks, Recreation and Historic Preservation in 1983. Since the Preserve's inception, additional gifts from the



(from left to right) Dr. Lucy R. Waletzky, Clare M. Pierson, David Rockefeller, Commissioner Rose Harvey

Rockefeller family have extended its size to over 1,400 acres of land, spanning from the Hudson River to the Saw Mill Valley.

On March 26, 2015, an event to publicly announce the gift was held at Rockefeller State Park Preserve. Parks Commissioner Rose Harvey and NHT Board member Lucy R. Waletzky made remarks, as did David Rockefeller.

Endowments and Major Gifts



Hempstead Lake State Park

In Memoriam – Phillip Scott

Phillip Scott loved Hempstead Lake State Park. And in the later years of his life he walked around the lake almost every day, enjoying the peacefulness of the park. Phillip Scott died on April 19, 2013 at the age of 82, leaving his entire estate to New York State Parks by way of the Natural Heritage Trust. His generosity – and love of the park – resulted in a memorial gift valued at about \$750,000. The proceeds of Mr. Scott’s estate will be managed as an endowment and will solely be used to support projects and activities at his beloved Hempstead Lake State Park.

Mr. Scott was a retired school teacher from the Oceanside, New York school district, and a World War II Veteran. He began visiting the park when he moved to Rockville Centre – which is adjacent to Hempstead Lake State Park – in the 1960s. Although his park visits began when he moved to the neighborhood, he really fell in love with, and enjoyed the park daily, after he retired. His estate consisted of his home in Rockville Centre, a car, and his art collection. He was an avid art collector with connections to major galleries



in New York City. His extensive and quite eclectic collection collectively sold for more than \$295,000 contributing to his generous bequest to Hempstead Lake State Park.

Mr. Scott did not request any recognition for this donation. However, to honor his memory and permanently acknowledge his devotion to Hempstead Lake State Park, we are proud to be naming the pavilion at Hempstead Lake the “Phillip Scott Memorial Pavilion.”

Foundation Support



Robert G. Wehle State Park

Foundation Support

During FY2014-15 the NHT received over \$1 million in support from a variety of foundations, trusts and not-for-profit organizations. In some instances, the NHT receives annual distributions from entities with funding dedicated for the benefit of specific parks and facilities. In other cases, the NHT has been awarded foundation grants in support of specific programs and/or projects.

The NHT is proud to report on the following examples of foundation supported work and will continue this work, as well as take on new initiatives, with increased foundation support.

Rockefeller State Park Preserve Conservancy

- The Rockefeller State Park Preserve Conservancy is a private foundation co-funded by Lucy R. Waletzky, Chair, SCOP, and David Rockefeller, Sr. In 2014-15, the Conservancy's annual grant to the NHT totaled \$80,000.
- This year's grant funded an innovative pilot program that brought sheep and goats to the Preserve to control invasive plant species.



The program was made possible through the partnership between the Preserve and the Stone Barns Center for Food & Agriculture.

- The animals effectively managed the growth and spread of invasives that otherwise result in unusable areas throughout the park.



Robert G. Wehle State Park

- The Robert G. Wehle Charitable Trust was created to fund capital infrastructure and long-term upkeep of the park located on Lake Ontario in the Thousand Island region.
- The Trust distributed \$98,000 to the NHT in FY2014-15 to support ongoing operational needs and special maintenance projects.

Foundation Support



Walkway Over the Hudson State Park

Walkway Over the Hudson

The Walkway Over the Hudson (Walkway) is a former railroad bridge transformed into public park and pedestrian footpath. The Walkway spans the width of the Hudson River between Poughkeepsie and Hyland, and opened for public use in 2009. In 2014, the Upper Landing Park and Elevator opened. These two new additions further complement the Walkway experience. The special glass Elevator brings visitors to Upper Landing Park and down to the Poughkeepsie waterfront.

The Walkway is one of the Hudson Valley's top attractions. From the start, the Dyson Foundation has been one of the Walkway's strongest supporters. In FY2014-15, The Dyson Foundation continued its commitment and support of the Walkway by awarding NHT a \$60,000 grant to assist OPRHP in the operation and maintenance of Upper Landing and the Elevator.



In Memoriam – Dennis L. Wentworth

Dennis L. Wentworth worked for New York State Parks in many different capacities for over 33 years and made many important contributions to the field of archaeology and state historic site collections. In retirement, Dennis continued to have a strong presence in the historic preservation community, serving on numerous boards and committees. Upon his passing in December of 2012, his wife, Ann, set up a



memorial fund with the NHT to honor Dennis' love of history and archaeology. The purpose of the fund is to support programs and projects at state historic sites.

New children's educational programming at Staatsburg State Historic Site made possible through the Dennis Wentworth Memorial Fund

Friends' Support and Partnerships



Minna Anthony Common Nature Center

In pursuit of its overall mission, the NHT builds and maintains partnerships with a variety of Friends groups and other groups. The NHT collaborates in a number of ways – in some cases acting as a fiscal agent, and in some situations the NHT receives funds raised by the Friends in order to support a specific park or site. The NHT welcomes the support of all Friends groups and stands ready to partner with Friends in myriad ways. The examples are a small sampling of these valuable and productive relationships.

Minna Anthony Common Nature Center

- The Nature Center provides educational and recreational programs for all ages, and is one of the main attractions of Wellesley Island State Park.
- The NHT provides administrative support for the Nature Center funded, in part, through contributions from the Friends of Minna Anthony Common Nature Center.

FORCES (Friends Of Recreation, Conservation and Environmental Stewardship)

The pilot collegiate FORCES – Friends Of Recreation, Conservation, and Environmental Stewardship – program was launched in 2008 in the Central New York State Park Region under the Natural Resource Stewardship and Environmental Interpretation Initiative working with the State University of New York College of Environmental Science and Forestry (SUNY ESF).

Funding and support from OPRHP and the NHT with additional support from the Open Space Institute's (OSI) Alliance for New York State Parks initiated an expansion of the FORCES program which was launched during the 2013-2014 academic year. In 2014, FORCES grew to a network of 14 participating collegiate institutions. More than 800 students engaged in a variety of volunteer conservation and stewardship projects.



FORCES Ambassadors & Stewards provided meaningful internships for academic credit, work-study opportunities

and professional experiences. Students served as Ambassadors and Stewards in various capacities and titles, such as Regional Sustainability, Environmental & Cultural Interpretation, Community Conservation, Park Planning and Conservation at numerous OPRHP parks and historic sites including Green Lakes, Clark Reservation, Chittenango Falls and Ganondagan State Historic Site.

Programming, Agency Initiatives & Partnerships



Learn to Swim at Grafton Lakes State Park

The NHT provides support to its state agency partners by soliciting and securing grants, donations, program income and other funds to help further agency goals and initiatives. Funds received and administered by the NHT enhance the agencies' abilities to carry out their respective missions by supplementing state resources. These cooperative relationships allow NHT to provide fiscal and administrative assistance and achieve efficiency that often cannot be achieved by other organizations.

Recreational Programming

New Camper Program

- In 2014, New York State Parks, the Natural Heritage Trust and the State Office of Children and Family Services, with support from The North Face and its *Explore Your Parks™* program, offered overnight camping experiences to 135 foster families who were new to camping or looking to re-connect with nature.



- The partnership encouraged families to get outdoors and enjoy New York's park system by providing a free two-night stay at a State Park campground of the families' choosing. Participating families received a special camping experience package, and the chance to win a full North Face camping equipment pack, including a six-person tent, sleeping bags, camping chairs, cook stove and other outdoor accessories.

Learn to Swim

- Learn to Swim started in the summer of 2013 as a pilot program with free Swim Programs being offered in New York City at Riverbank and Roberto Clemente State Parks. In 2014, Learn to Swim grew with expanded programs at Riverbank State Park and Roberto Clemente State Park (180 participants); and included the first rural programs at Grafton Lakes State Park (120 participants) and Moreau Lake State Park (43 participants); and Taughannock Falls State Park (73 participants). Modified swim programs were held in partnership with existing programs at Rudd Pond State Park, Franklin D. Roosevelt State Park, and Chenango Valley State Park.



- Learn to Swim was supported by the National Swimming Pool Foundation (\$10,000), Northeast Spa & Pool Association Foundation (\$5,000), and the American Red Cross (training and funding for the Water Safety Instructor [WSI] courses in NYC).
- The future plans (Summer of 2015) are to continue the expansion with a goal of providing free Learn to Swim programs in all eleven OPRHP Regions, and a 5-year plan for offering Learn to Swim in every NYS Park that has a pool or lake appropriate and safe for swimming.

Environmental and Outdoor Education



Green Lakes State Park

DEC Camps

- DEC runs four environmental education summer camps across New York State that connect children ages 11 through 17 to their natural surroundings, instilling a life-long appreciation of nature.
- For the past four years, the NHT has received donations to help under-served children attend DEC camps. In addition, each year two teens are chosen to receive a special camp scholarship in memory of Emily Timbrook.



Green Lakes Environmental Field Days

- The annual Environmental Field Days were held in October 2014 at Green Lakes State Park with programming supported by funds raised through the NHT.
- Environmental Field Days consists of two days of environmental presentations and activities designed to fit the science curriculum for those students in attendance, with topics ranging from ecosystems and recycling to lake ecology and fish identification.



Community Sponsored Agriculture at Bayard Cutting Arboretum

- Founded in the fall of 2011, the Bayard Cutting Arboretum Community Sponsored Agriculture (CSA) Farm is the only CSA program in the New York State Parks system.
- The CSA Farm encourages a community-based approach towards growing sustainable organic produce. Members learn about sustainable farming techniques and purchase "shares" in the program. Members and also volunteer their time to plant, maintain and harvest the CSA crops.
- The costs of maintaining the farm and membership in the CSA are managed through the NHT. In its third year, over 70 families enjoyed weekly fresh seasonal vegetables, herbs and flowers.



Agency Initiatives



Invasive Species Management
at Minnewaska State Park Preserve

Invasive Species Management

- Invasive species are one of the primary threats to our native biological diversity, second only to habitat loss.
- During FY2014-15, the NHT continued its partnership with OPRHP to further invasive



species management, by receiving grant funds to support related staff and program costs.

Brownfield Opportunity Areas (BOA) Program

- The BOA program, administered through DOS, provides a neighborhood approach to brownfield assessment and redevelopment, as well as a flexible framework for participants to

generate revitalization strategies through a locally-driven process.

- NHT project staff administer and oversee projects located in New York City, Nassau and Suffolk Counties, lower Hudson Valley and in the major upstate cities of Buffalo, Rochester, Syracuse and Oswego.

Coastal Consistency

- The NHT provides staff assistance to DOS in performing project reviews (“consistency”) for the State’s Coastal Management program.
- NHT staff review applicant proposals for energy and large utility projects, communicate with applicants, provide recommendations on whether proposals are consistent with the program, and help develop and implement recommendations to improve program efficiency.



Agency Initiatives



Buttermilk Falls State Park

Ocean and Great Lakes Program

- The NHT provides administrative assistance to OPRHP and DEC in the implementation of the Ocean and Great Lakes Program, by providing project staff who work to further broad-based ecosystem-based management (EBM) in the Ocean and Great Lakes watersheds.
- EBM for the program has four primary goals which are focused on: 1) biodiversity and habitat



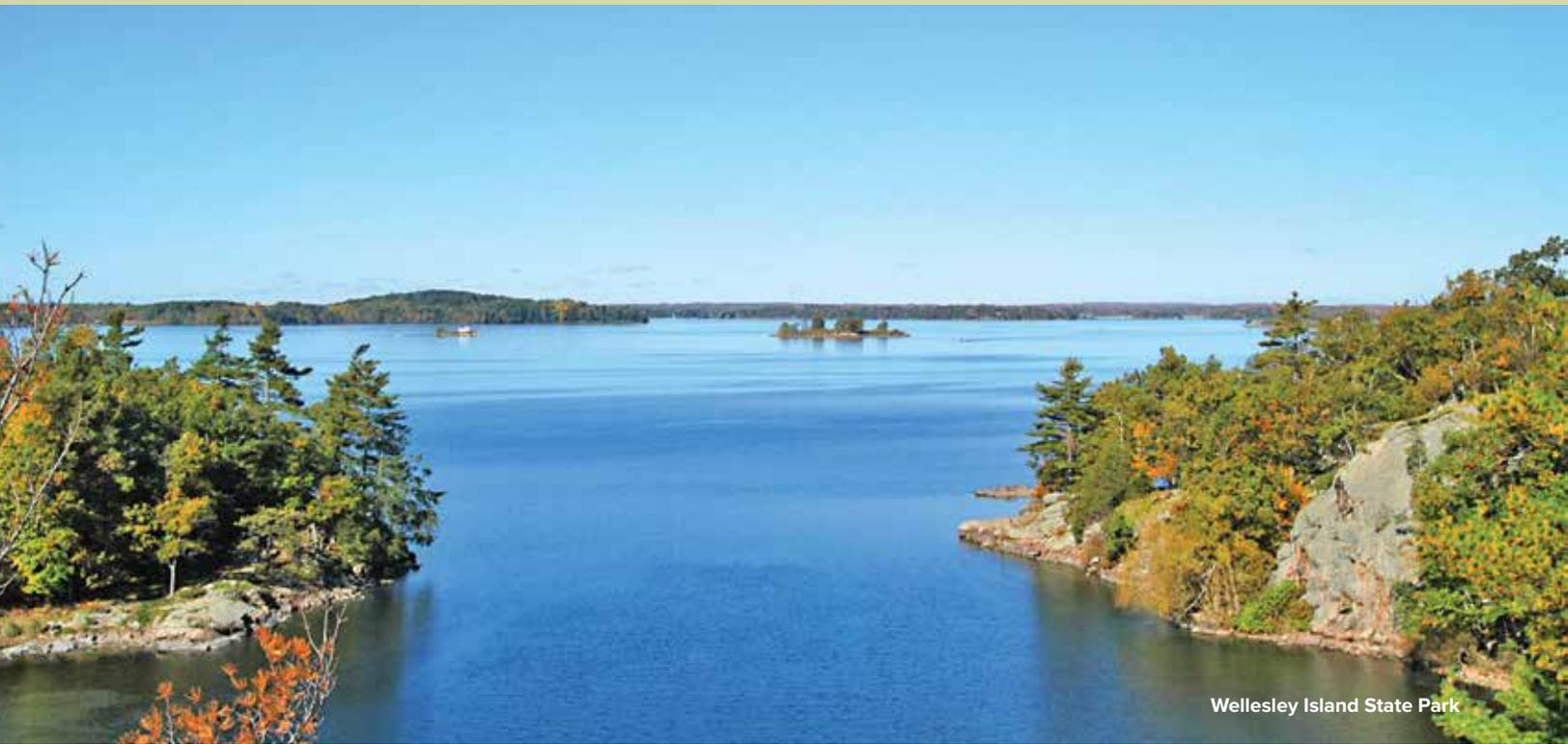
connectivity through targeted land acquisition and conservation; 2) ecosystem, watershed and biodiversity conservation; 3) patron EBM awareness; and 4) EBM policy and management.

Master Park Planning

- Since 2008, NHT has provided support for the OPRHP Master Planning Initiative through a combination of public, foundation and gift funds to provide staffing assistance and to administer contracts in support the development of master plans.
- This partnership has allowed for the creation of several dynamic master plans throughout the state park system that guide development, programming and park operations in a manner that protects natural and cultural resources.



Partnerships and Project Collaborations



Wellesley Island State Park

St. Lawrence Habitat Project

- As part of the New York Power Authority's (NYPA) relicensing of its St. Lawrence-FDR Power Project hydroelectric facility, NYPA and DEC entered into a settlement agreement whereby NYPA agreed to provide funding for certain Habitat Improvement Projects (HIPs), improvements to the Wilson Hill Wildlife Management Area, and various public access projects.
- The project funds are paid by NYPA to the NHT, and since 2010 the operation, management, and maintenance of the projects has been overseen by DEC and NHT project staff associated with the St. Lawrence Habitat Project.

Clean Sweep NY

- CleanSweepNY is an Environmental Benefit Program that coordinates the responsible management and proper disposal of unusable pesticides and other chemical wastes accumulated by farms and schools.
- Collections are scheduled and organized by DEC and the NYS Department of Transportation and NHT administers the funding. In FY2014-15 eight collections took place across New York State.
- The CleanSweepNY program is supported by Cornell Cooperative Extension, the Agricultural Container Recycling Council, Soil and Water Conservation Districts, New York Farm Bureau, and other related grower associations.



Partnerships and Project Collaborations



Niagara River Fish and Wildlife Habitat Improvement Program

Niagara River Fish and Wildlife Habitat Improvement Program

- In March 2010 the NHT entered into a cooperative agreement with DEC and the New York Power Authority (NYPA) through which the NHT provides administrative and fiscal assistance to the Fish and Wildlife Habitat Improvement Program in the Niagara River Corridor.
- Under this cooperative program DEC collaborates with NYPA and other member agencies and organizations of the Ecological Standing Committee to implement eight Habitat Improvement Projects (HIPs) in the Corridor and make funding decisions on future HIPs under the Habitat Enhancement and Restoration Fund.

Finch Grant Program

In August 2012, Governor Cuomo announced the planned acquisition of 69,000 acres of the former Finch Paper lands from The Nature Conservancy (TNC); the largest single addition to the Adirondack Forest Preserve (Preserve) in more than a century.

To encourage public access and use of the newly acquired lands, TNC pledged \$500,000 in funding to support community development projects that enhance connections between the former Finch/Nature Conservancy lands and residents and visitors to the surrounding communities.

In June of 2014, DEC announced the competitive grant program, funded by TNC and administered by the NHT. Projects considered for funding incorporated smart growth principles of economic development and environmental



protection. Grants were awarded to support a wide range of projects that include local infrastructure to support recreational uses such as hiking, mountain biking, horse trail riding, snowmobiling and canoeing, as well as signage and guide services. The NHT is proud to partner with DEC, TNC and the local municipalities on this special program.

Financial Highlights

CONDENSED STATEMENT OF FIDUCIARY AND OPERATING ACTIVITY (For Year-Ending March 31, 2015)

Fiduciary Fund Revenue

Gifts & Private Grants	\$5,420,000
Grants & Project Contracts	\$3,361,000
Program and Activity Income	\$1,749,000
Investment Income & Gains	\$792,000
Sponsorship	\$267,000
Other	\$60,000
Total Revenues	\$11,649,000

Fiduciary Fund Expense

Program Support	\$3,727,000
Activity and Event Support	\$1,600,000
Construction/Capital Projects	\$1,080,000
Promotional Materials & Resale Items	\$707,000
Professional Services	\$378,000
Gift Reassignment	\$363,000
Other	\$3,000
Total Expenses	\$7,858,000

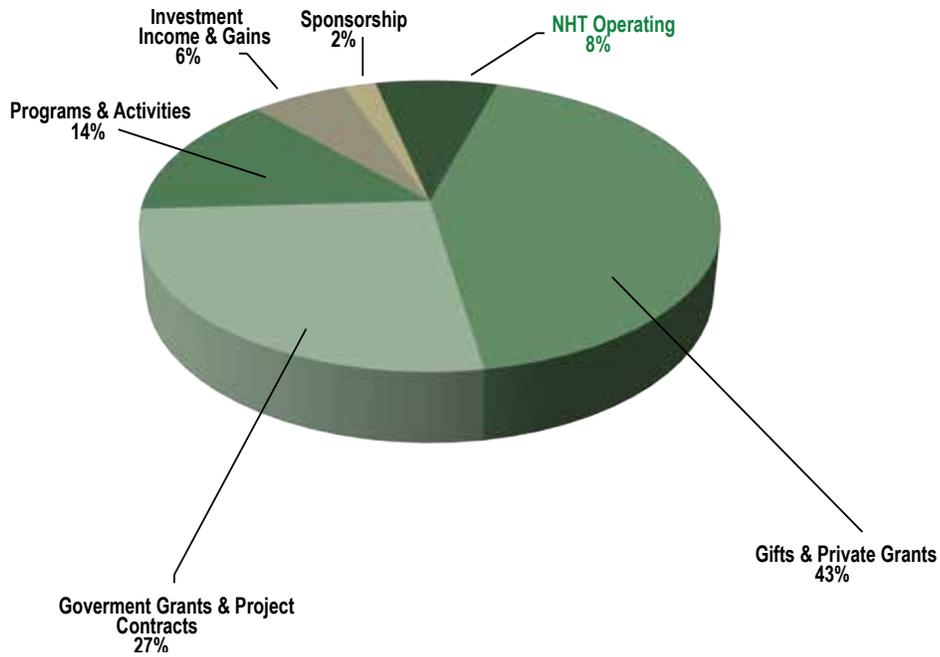
Net Change in Fiduciary Position	\$3,791,000
Total Assets and Fund Balance Beginning of Year	\$28,197,000
Net Liabilities & Receivables	\$408,000
NHT Operating Revenues	\$1,007,000
NHT Operating Expenses	\$1,086,000
Total Assets and Fund Balance at Year End	\$32,317,000

Financial Highlights

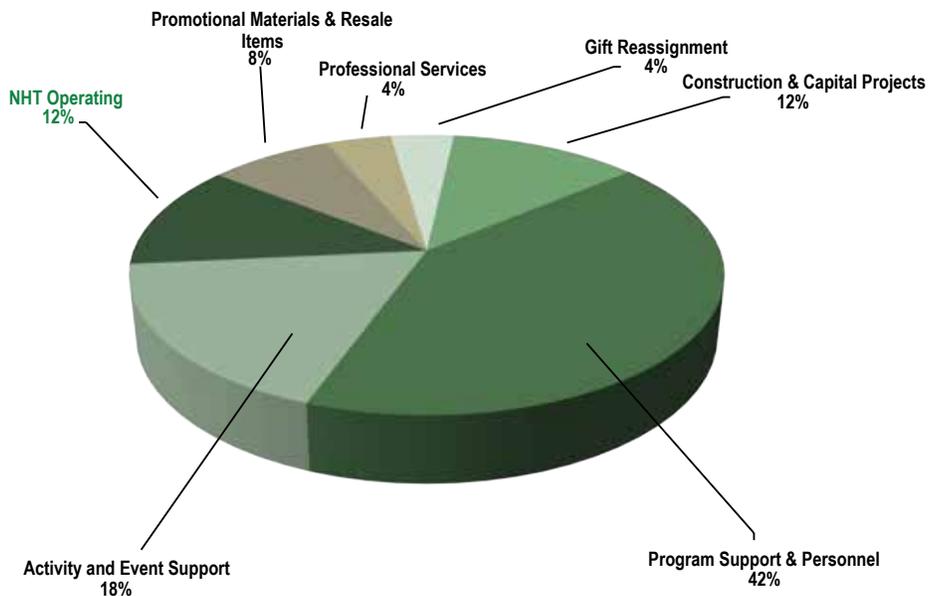
REVENUES AND EXPENSES

(For Year-Ending March 31, 2015)

Revenues by Source



Expenses by Source



Financial Highlights

INVESTMENT ACCOUNTS

(For Year-Ending March 31, 2015)

Capital Projects/Reserves

Hallock State Park	\$4,170,000
Main Reserve	\$849,000
Bayard Cutting Arboretum	\$246,000
Total Capital Projects	\$5,265,000

Endowment/Long-Term Investment

Four Freedoms	\$2,772,000
Mount Loretto	\$2,695,000
Rockefeller Preserve	\$2,025,000
Minnewaska Preserve	\$1,796,000
Main Long-Term Investment	\$1,601,000
Sampson Veteran's Museum	\$785,000
Emma Treadwell Thacher	\$550,000
Huttleston	\$111,000
Total Endowments	\$12,335,000

Short & Intermediate-Term Investment

Main Management (Fiduciary)	\$12,036,015
Total	\$12,036,015

Investment Targets

	Capital Projects	Endowments	Short & Intermediate
Fixed Income	85%	40%	95%
Equities	15%	60%	0%
Cash/Money Market	0%	0%	5%

Our Supporters

We are pleased to take this opportunity to publicly acknowledge and sincerely thank our many donors, partners, and sponsors who contribute to the preservation of New York's natural resources and historic treasures. This past year our supporters have given to the NHT in a multitude of ways and at a variety of levels. Contributions, both large and small, have enhanced programs and projects that directly benefit parks, recreation, conservation and historic preservation. We deeply appreciate the personal commitment and dedication of our generous supporters.

Ways You can Give

For over 40 years, thousands of individuals and private organizations have contributed financial resources that make the work of the NHT possible. We realize that many supporters are considering how to include philanthropy in meaningful personal financial planning. We are dedicated to assisting those who wish to make gifts now and in the future, in ways that can contribute powerfully to the mission of the NHT and be effective tools for managing your own money. A broad range of flexible options and opportunities are available to give now, and to plan for future gifts.

Present and Annual Giving

Private support has always been critical to ensuring that the many public program offerings are adequately resourced. And because of the recent fiscal challenges facing New York State, private funding through the NHT has become increasingly important and provides vital support for a variety of programs. Also please know that your gift will be directed – as per your wishes and instructions – to the park, site, facility and/or program of your choice.

Direct Gifts

You can make a one-time or recurring donation online at www.naturalheritagetrust.org or mail a check directly to: Natural Heritage Trust, 625 Broadway, Albany, New York 12207.

Memorial and Tribute Gifts

The NHT accepts memorial and tribute gifts to remember and honor family members and friends. The NHT also accepts tribute gifts, which celebrate the special people, events and milestones in your life. When your memorial or tribute gift is received, the NHT will send a personalized letter to the person you indicate, notifying them of your thoughtful gift.

Employer Matching Gifts

You can double or even triple the impact of your gift if you or your spouse's or partner's employer participates in a matching gift program. Please check with your employer to find out if this is an option, and if documenta-

tion is required the NHT will be happy to provide you with whatever you need.

Gifts of Stock and Securities

The NHT accepts stock, bonds, mutual funds, and other securities. Donors receive a formal acknowledgment and tax substantiation upon receipt of a gift. If you are considering a gift of stock or securities please contact the NHT for the transfer information.

Planned and Future Giving

Planned Giving provides a variety of opportunities to further support parks and the environment in a meaningful way as part of your estate planning goals. By leaving a gift to your favorite park or historic site (through the NHT) you will make an enduring contribution to ensure that New York's natural and historic resources are preserved and maintained to be enjoyed by future generations.

Bequests

By remembering the NHT in your will, you will make a lasting contribution. You can designate a specific amount, a percentage of your total estate, or a share of the residual amount after gifts to your heirs. Your bequest can be designated for general purposes or to a specific park, historic site, or program area.

Charitable Remainder Trust

Charitable remainder trusts are popular plans because of the flexibility they offer. They are similar to other types of trusts, except that the NHT receives the remainder interest. You assign cash or securities and specify how trust income and the remainder interest will be distributed.

Charitable Lead Trust

Charitable lead trusts are the reverse of charitable remainder trusts in that payments from the trust are given to the NHT for a specified term in years. Upon your death or the end of the term, the net assets of the trust pass to your family or other designees.

Gifts of Life Insurance

When your life insurance policy was originally purchased, you likely had a need for the benefits. Perhaps today you don't need the coverage. To contribute your life insurance policy, simply name the NHT as its beneficiary or partial beneficiary.

If we can be of assistance to you or your advisors in your charitable gift planning, please don't hesitate to contact us. And if you've made the NHT the beneficiary of your charitable planning, please let us know. We would like very much to acknowledge your special gift.

Thank you for your support of, your commitment to, and your investment in New York State's parks, open spaces, and natural and historic resources!

Contributors, Sponsors & Partners

The Natural Heritage Trust gratefully acknowledges the individuals, corporate contributors, sponsors and charitable foundations who generously supported parks and conservation this year.



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We make every effort to ensure our donor list is accurate but mistakes and omissions may occur. If you or your company name are missing from this list, please contact us.

Natural Heritage Trust



Higley Flow State Park

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