Supporting Parks and Recreation, Land and Water Conservation and Historic Preservation in New York State since 1968
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The Natural Heritage Trust (NHT) is pleased to present its Fiscal Year (FY) 2012-13 Annual Report. This report highlights ways the NHT secured financial support, ranging from small donations to large corporate gifts and sponsorships. We are proud to report on how 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 in response to the continuing fiscal challenges facing New York State. Private funding through the NHT provided vital support for a variety of agency projects and programs.

The NHT is also 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 financial resources are focused on benefiting public resources in our parks, open spaces and historic sites. This report describes ways in which funds were raised and administered by the NHT to benefit public projects and programs throughout the State during FY 2012-13. 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.

At the close of the year the NHT held just over $25 million in assets. During FY 2012-13, the NHT expended approximately $10.9 million in support of programs and projects throughout the State, while at the same time receiving just over $10.2 million from a variety of sources including donations, grants, corporate sponsors, programs and activities, and other fundraising initiatives.
The Natural Heritage Trust (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.

The NHT’s mission is to receive 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 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.

Rose Harvey, Chair, Natural Heritage Trust  
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.
Hurricane Sandy

New York State experienced widespread and devastating impacts from Super Storm Sandy which made landfall on October 29, 2012. Overall, Sandy cost the State $32 billion in damage and loss. The State sustained significant environmental damage and shorelines were particularly hard hit.

Impact and Response

Ribbon Cutting and Opening of Robert Moses State Park, Memorial Day Weekend, May 29, 2013

During these challenging times, the support of donors and volunteers is most appreciated both in helping our state parks, as well as our natural landscapes, and the NHT stands ready to help. As an example the NHT collaborated with DEC’s Urban Forestry program to accept donations and help the City of Long Beach replant areas hit by Sandy. Volunteers from Starbucks, Viacom, and The Home Depot came to help out the City by planting, landscaping, mulching, and watering donated trees, shrubs, and flowers.

More than 50 state parks were affected by the storm. Damage estimates for the parks on Long Island, New York City and the Hudson Valley exceeded $100 million. Several of Long Island’s parks remained closed weeks after the storm, and Jones Beach and Robert Moses State Parks, among the most popular in the park system, were severely damaged. Impacts include significant beach and dune erosion, undermining of park roadways and parking areas; heavy damage to boardwalks; disrupted utilities, including power, water and sewer lines; and wind and flooding damage to numerous park buildings.

Rebuilding and restoring the damage to our state parks and natural resources will take significant time and funding. Clean up and repair efforts are still underway, and fortunately, a significant portion of the repair costs are eligible for funding from the Federal Emergency Management Agency (FEMA).
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.

Endowment Support

The NHT manages $6.8 million in separate 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. The endowments are invested with a target of 60 percent equity funds and 40 percent fixed income. Earnings from these accounts support restricted projects and programs.

At present, the NHT is actively expanding its endowment administration. Over the past two years, OPRHP has committed to a series of land purchases from the Open Space Institute (OSI) and the Nature Conservancy (TNC) at and around Minnewaska State Park Preserve. As part of the purchase agreements OSI and TNC will agree to donate a portion of the purchase price to the NHT to establish a permanent stewardship endowment for the properties. The first of these land acquisitions has closed and the NHT expects to receive initial funding early in FY 2013-14.

Highlights from 2012-13:
Mount Loretto

- The endowment for Mount Loretto was originally funded in 1999 at $1.5 million through a gift agreement between the NHT, Trust for Public Land (TPL) and DEC to support projects and programs at the 194-acre property overlooking Raritan Bay along Staten Island’s south shore.

- The NHT and DEC are currently working on a multi-year spending plan utilizing investment earnings on the endowment which is now valued at $2.4 million.
On October 17, 2012, Governor Andrew M. Cuomo announced the opening of Franklin D. Roosevelt Four Freedoms Park, a new State Park located on Roosevelt Island in the East River. Four Freedoms Park is a tribute to the life and work of President Roosevelt, a former governor of New York State who led the nation through a tumultuous period in American and world history. The Park opened to the public on October 24.

The Park had been decades in the making. More than 30 years after its initial announcement in 1973, former Ambassador to the United Nations William vanden Heuvel and the Four Freedoms Park Conservancy spearheaded a philanthropic effort to revive the park, enabling construction to begin in 2010. The cost of construction was raised from a variety of sources, including government funds and over $10 million generously contributed by the Alphawood Foundation, Chicago. In 2010, the Alphawood Foundation granted $2 million to the NHT to support an endowment dedicated to the ongoing management and operation of the park.

The endowment is currently valued at $2.5 million with $100,000 distributed annually to Four Freedoms Park Conservancy to support park operations.

Emma Treadwell Thacher Nature Center

- The Nature Center, located at Thompson’s Lake State Park, opened in 2001 and was supported by a $750,000 donation by Fred and Martha Schroeder with $350,000 designated for an endowment managed by the NHT.
- The endowment currently holds almost $508,000 and supports programming at the Center.

Franklin D. Roosevelt Four Freedoms State Park

On October 17, 2012, Governor Andrew M. Cuomo announced the opening of Franklin D. Roosevelt Four Freedoms Park, a new State Park located on Roosevelt Island in the East River. Four Freedoms Park is a tribute to the life and work of President Roosevelt, a former governor of New York State who led the nation through a tumultuous period in American and world history. The Park opened to the public on October 24.

The park derives its name from a January 6, 1941 speech delivered by President Roosevelt, in which he described his vision for a world founded on four essential human freedoms: freedom of speech and expression, freedom of worship, freedom from want, and freedom from fear.
Foundation Support

During FY 2012-13 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 seeking to take on new initiatives, with increased foundation support.

Rockefeller State Park Preserve

- The Rockefeller State Park Preserve Conservancy is a private foundation co-funded by Dr. Lucy R. Waletzky, Chair, SCOP, and David Rockefeller, Sr.

- In 2012-13, the Conservancy’s annual grant to the NHT totaled $30,000 to support carriage trail maintenance in the Preserve.

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 $135,000 to the NHT in FY 2012-13 to support ongoing operational needs and special maintenance projects.
Bayard Cutting Arboretum

- During FY 2012-13, the NHT received distributions totaling $600,000 (including $100,000 dedicated to a capital reserve account) from the Bayard Cutting Arboretum Trust, which oversees the endowment in memory of the William Bayard Cutting family.
- This year the funds supported restoration of the Annex (closed since 1912), the Royce Rhododendron Collection, the Woodland Garden and the Holly Walk. The funds also supported transplanting specimen trees, planting new trees, the summer concert series, design and publishing of a new brochure, and website redesign.

Battle Flag Preservation

- For the third year, the NHT was awarded a grant from the Coby Foundation dedicated to the conservation of New York’s Civil War battle flag collection.
- The $17,000 in grant funds will be used for graphic design and printing, exhibit construction, and educational programming related to the Battle Flag Preservation Project’s 2013 exhibition, “1863: Loyal till Death.”

Roberto Clemente State Park

Roberto Clemente State Park is a 25-acre waterfront park located along the Harlem River in the Bronx, NYC. The park offers a variety of recreational and cultural activities year-round for children, youth, adults, senior citizens and the physically challenged. The facilities include a multi-purpose recreation building, an Olympic-size pool complex, ball fields, basketball courts, picnic areas, playgrounds and a waterfront promenade.

The park opened in 1973 and is named after baseball player Roberto Clemente, the first Latino-American inducted into the Baseball Hall of Fame. As OPRHP plans for the park’s 40th anniversary, much has been done to revitalize the park. The NHT has been awarded two foundation grants which will assist in these efforts.

- The MetLife Foundation awarded the NHT a $75,000 grant towards the redevelopment of the main playground in the park.
- The Baseball Tomorrow Fund, a joint initiative between Major League Baseball and the Major League Baseball Players Association, awarded $100,000 toward the renovation of the park’s baseball field.
During FY 2012-13 the NHT received over $2.5 million in private gifts, grants and corporate sponsorships in support of a wide range of capital infrastructure and parks programming. In some cases a large individual donation may support a specific capital project; while in others corporate sponsorships support a weekend of programming in a popular state park. The following is but a handful of examples of major support.

Canopus Lake Beach Revitalization

- During FY 2012-13 the NHT received a $400,000 contribution from long-time supporter and Chair of the SCOP, Dr. Lucy Waletzky in support of revitalization projects at Canopus Lake Beach in Fahnestock Memorial State Park.
- These funds are being used to support the first phase of renovations that will help improve and update run-down public facilities at the park’s swimming beach and “Winter Park” area including the café space, ski and snowshoe rental area and comfort stations.

Black Diamond Trail

- The NHT and OPRHP have partnered with the Alliance for New York State Parks (an initiative of the Open Space Institute) to raise $1.2 million for the project. To date $825,000 has been secured, including a $400,000 grant through the State’s Environmental Protection Fund (EPF).
- The Black Diamond Trail (BDT) is a planned trail that will connect the City of Ithaca and four state parks: Taughannock Falls, Alan Treman Marina, Buttermilk Falls and Robert Treman.
- The NHT received a $231,000 bequest from the family of Allan Treman which, in conjunction with New York Works funding, supports construction of two bridges along the BDT.
**Major Gifts and Sponsorships**

### Five Rivers Guided School Program Building
- A dedication ceremony for the new Wendy Repass Suozzo Guided School Program education building was held on Saturday, September 15, 2012 at the center’s annual fall festival.
- A cooperative venture between the Friends of Five Rivers and DEC, the 2,300 square foot structure will house the Friends of Five Rivers’ popular Guided School Program (GSP), which was made possible through a $500,000 memorial donation to the NHT by the Repass family.
- Approximately 4,000 students go through the program each year, reaching more than 200,000 students since the program’s inception in 1978.

### Taughannock Falls Concert Series
- The annual summer concert series at Taughannock Falls State Park in Trumansburg highlighted the Finger Lakes region’s local talent, and entertained over 18,000 visitors.
- This year’s sponsors included Tompkins Trust Company and Tompkins Insurance Agencies.

### Beach Bethpage Federal Credit Union Air Show
The 2012 Bethpage Federal Credit Union Beach Air Show was headlined by both the United States Navy Blue Angels and the Canadian Snowbirds. The annual air show, held on Memorial Day weekend, was attended by almost 400,000 patrons. The US Army Golden Knights parachute jump team, F/A-18 Super Hornet, C-130, and F-22 Raptor rounded out the military performers, and a number of civilian acts entertained the crowd throughout the weekend.

The air show is made possible through contributions to the NHT from corporate sponsors, as well as from the sale of hospitality tickets. Over $160,000 was raised through the generosity of corporate sponsors, such as title sponsor Bethpage Credit Union, Volkswagen, Oracle, Verizon, Neutrogena, the Air National Guard and 7-11. These funds were used to help support expenses related to the show, and as a result, no fee was charged to the public for admission beyond OPRHP’s standard per vehicle park entrance fee.

### In Memoriam – Betty and Wilbur Davis State Park
Betty and Wilbur Davis enjoyed and maintained 190 acres of land in the town of Westford, which they shared with family and friends who frequently hunted and fished the property. They donated this land to the State of New York in 2001, for the establishment of the Betty and Wilbur Davis State Park.

In addition to the park land, the couple donated over $2 million to the NHT. Their donations supported the initial development of the park and continue to support ongoing operation and maintenance. The most recent additions include a playground, comfort station facilities and pavilion. The initial phase of construction included six full service cottages set on 200-acres of hardwood forests which continue to be a popular choice for visitors and families.

The NHT and OPRHP pay tribute to Betty and Wilbur Davis. Betty passed away on November 14, 2012 at the age of 96. Wilbur passed away on March 19, 2013, at the age of 101. The Davis’ have named the NHT as beneficiary of their estate. The NHT expresses humble appreciation and sincerest gratitude for Betty and Wilbur’s generosity, and for their enduring support over the years.
Friends’ Support and Partnerships

As part of its overall mission, the NHT builds and maintains partnerships with a variety of Friends groups. The NHT collaborates with these groups 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 a myriad of ways. The examples of NHT’s partnerships with Friends provided here is just 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.

Hyde Hall Historic Site
- Hyde Hall, Inc., in collaboration with OPRHP, operates, maintains and supports Hyde Hall State Historic Site, located on the shores of Otsego Lake.
- During FY 2012-13, the NHT has continued its partnership with Hyde Hall, Inc. to accept certain donations on its behalf to further fundraising efforts for the historic site.

Montauk Downs State Park Golf Course Renovation
- The NHT partners with The Friends of Montauk Downs Incorporated to administer funds in support of restoration of the Robert Trent Jones golf course at Montauk Downs State Park.
- The Friends’ major fundraising initiatives include an annual gala and seasonal golf tournaments, as well as contributions from numerous corporate and individual donors.

Friends of East River State Park
- The NHT entered into a partnership with the newly formed Friends of East River State Park, whereby the NHT serves as a fiscal agent and hold funds raised by the Friends.
- In conjunction with “I Love My Park Day” the group held a flag ceremony with local community leaders at the park which serves the Williamsburg and Greenpoint neighborhoods of Brooklyn.
The NHT provides support to its state agency partners by accepting 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 scarce 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 and Cultural Programming

Riverbank State Park
- Donations, fundraising revenue, activity registration fees and a $10,000 sponsorship by Coca Cola were used to support youth programming and activities at Riverbank State Park.

- Activities include athletic teams in ice hockey, football, swimming, cheerleading, baseball and basketball, as well as support for community and cultural events.

Lorenzo State Historic Site
- Lorenzo State Historic Site, overlooking Cazenovia Lake, is host to many events and activities throughout the year.

- Program support is provided through the NHT covering events ranging from Christmas at Lorenzo to the Rippleton Schoolhouse Immersion Program.

Niagara Falls Special Events
- During FY 2012-13, donations and other revenue were used to support a variety of events and cultural programming, including the hiring of historic interpreters sponsored by Niagara Falls Theater Venture.

- The NHT also provided assistance to OPRHP during preparations for aerialist Nik Wallenda’s tightrope walk across the Falls.

Long Island Summer and Winter Run Series
- The Long Island State Parks Summer Run series, the largest running series on Long Island, is held seven consecutive weeks during the summer at a different park each week.

- The NHT raises funds through participant registration and event sponsorships which are then used to fund both the summer and winter series, as well as other recreational programs throughout the region.

Genesee Recreational Programs and Events
- Funds raised through the NHT supported events throughout the Genesee region, including summer and fall concerts at Lakeside Beach, Hamlin Beach, and Darien Lakes State Parks, as well as Hamlin Beach’s Earth Day and Darien Lakes’ “Kid’s Day”.

- At Letchworth State Park, funds supported a concert series, as well as the Arts and Crafts Show, The Stone Tool Technology Show and “Fire on the Genesee” Civil War encampment and re-enactment.
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.

Moreau Lake State Park Nature Center

- The NHT supported programming and new displays at the nature center which typically welcomes dozens of school field trips each year.

- Funds in support of the park and nature center were raised through donations, environmental education program income and other local initiatives.

Taconic Outdoor Education Center

- The Taconic Outdoor Education Center, located in Fahnestock State Park, provides year-round environmental education, outdoor recreation and opportunities for team building.

- The Center and programming, such as rope courses, maple sugaring and retreats, are partly funded by foundation, corporate and individual donations through the NHT.

Green Lakes Environmental Field Days

- The Taconic Outdoor Education Center, located in Fahnestock State Park, provides year-round environmental education, outdoor recreation and opportunities for team building.

- The Center and programming, such as rope courses, maple sugaring and retreats, are partly funded by foundation, corporate and individual donations through the NHT.

Allegany State Park Environmental Education

- With 65,000 acres of wilderness and nearly 1.3 million visitors a year, Allegany State Park is a year round playground for campers and day users from Western New York, Pennsylvania, Ohio and beyond.

- The NHT receives donations through and in support of interpretive programs at Allegany State Park, including the Junior and Senior Naturalist Program, Girls Day and the Naturalist Bookstore.
Invasive Species Management

- Invasive species are one of the primary threats to our native biological diversity, second only to habitat loss.
- During FY 2012-13, the NHT continued its partnership with OPRHP to further invasive species management, by receiving grant funds to support related staff and program costs.

Ocean and Great Lakes

- 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 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.

Brownfield Opportunity Areas (BOA)

- The BOA program helps identify and administer previously industrial or commercial properties that are unusable due to their prior pollution/contamination (i.e., Brownfields). The BOA is administered through DOS, providing 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 BOA 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.

Master Park Planning

- Since 2008, the 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 of master plan development and implementation.
- 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

St. Lawrence Habitat
- 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, 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.

The Historic Hudson-Hoosic Rivers Partnership
- The Historic Hudson-Hoosic Rivers Partnership was established to comprehensively support regional efforts through an innovative and voluntary framework of public and private groups, including local and state government.

- During FY 2012-13 the NHT continued to work collaboratively with the Partnership, acting as a fiscal agent and contract administrator on grants received in support of the Partnership’s work.
Niagara River Fish and Wildlife Habitat Improvement

• 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.

Niagara River Greenway Commission

• The NHT acts as fiscal agent for and provides administrative support to the Niagara River Greenway Commission which was created to develop and implement the Niagara River Greenway Plan incorporating the parks, conservation and ecologically significant areas of the Greenway into a cohesive, accessible space.

• As part of the overall effort in the Greenway, Niagara Falls State Park benefited during the past two years from $25 million in capital improvements funded through NYPA.
# CONDENSED STATEMENTS OF ACTIVITIES
(For year ended March 31, 2013)

## Revenues, Gains and Other Support

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<th>Source</th>
<th>Amount</th>
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<td>Grants and Contracts</td>
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<td>Gifts and Private Grants</td>
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<td>Investment and Administrative Income</td>
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<td>Activity Program Income</td>
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<td>Mitigation and Environmental Benefit Fund</td>
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<td><strong>Total Revenues, Gains and Other Support</strong></td>
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## Expenses

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<td><strong>Total Expenses</strong></td>
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**Results from Operations** $\text{(loss)}$ $695,000$

**Net Assets at Beginning of Year** $21,885,000$

**PLUS: Fund Balance Used in Current Year** $238,000$

**Net Assets at End of Year** $21,428,000$

**PLUS: Liabilities-Accounts Receivable** $2,022,000$

**PLUS: Remaining Fund Balance** $1,600,000$

**Total Assets Held In Trust** $25,050,000
Financial Highlights

REVENUES AND EXPENSES
(For year ended March 31, 2013)

Revenues by Source

Expenses by Source
INVESTMENT ACCOUNTS
(For year ended March 31, 2013)

Capital Projects/Reserves

Hallock State Park $4,004,000.00
Main Reserve $778,000.00
BCA Trust $226,000.00
Davis Park $153,000.00

Total Capital Projects $5,161,000.00

Endowment/Long Term Investment

Four Freedoms $2,534,000.00
Mount Loretto $2,374,000.00
Main LTI $1,312,000.00
Emma Treadwell Thacher $508,000.00
Huttleston $102,000.00

Total Endowment $6,830,000.00

Operating

Main Management $10,666,000.00

Total Operating $10,666,000.00

Investment Targets

<table>
<thead>
<tr>
<th></th>
<th>Capital Projects</th>
<th>Endowments</th>
<th>Operating</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fixed Income</td>
<td>85%</td>
<td>40%</td>
<td>95%</td>
</tr>
<tr>
<td>Equities</td>
<td>15%</td>
<td>60%</td>
<td>0%</td>
</tr>
<tr>
<td>Cash/Money Market</td>
<td>0%</td>
<td>0%</td>
<td>5%</td>
</tr>
</tbody>
</table>
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, 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 projects and programs of New York State Parks are adequately resourced. And because of the continuing fiscal challenges facing New York State, private funding through the NHT has become increasingly important and provides vital support for a variety of programs. Your support is needed now more than ever. 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. A memorial gift is a meaningful testimony to the life of a beloved person. 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 documentation 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 support New York State Parks in a meaningful way as part of your estate planning goals. By leaving a gift to your favorite park (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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Contributors, Sponsors & Partners

The NHT is fortunate to have such a broad group of dedicated partners. Together we have advanced numerous parks, conservation and preservation projects throughout New York State. We look forward to working together again in the future.

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The Natural Heritage Trust is deeply grateful to all of our donors whose gifts make the programs and projects supported by the NHT possible. Likewise, the NHT appreciates all those individuals who have participated in fundraisers and other events sponsored by the NHT.

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 Contribution Form

Yes, I would like to support projects and programs of the Natural Heritage Trust. Enclosed, please find my contribution in the amount of:

☐ $25  ☐ $100  ☐ $50  ☐ Other ($______)

Name: _______________________________________
Address: ______________________________________
City: ____________________ State: _____ Zip: ______
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Comments/Designation:

Please make checks payable to:
Natural Heritage Trust

Mail your contribution, with this form, to:
Natural Heritage Trust
625 Broadway • Albany, New York 12207
(518) 474-2997