

**S. L. Gimbel Foundation Fund  
Final Evaluation Report**

1. Organization: The Society for the Protection of New Hampshire Forests
2. Grant number: 20170575
3. Grant Period: September 15, 2017 - September 15, 2018 *(Evaluation Due: October 1, 2018)*
4. Location of Services (City and State): Walpole, New Hampshire
5. Name and title of person completing evaluation: Brian Hotz, VP for Land Conservation
6. Phone number: (603) 224-9945, extension 316
7. Email address: [bhotz@forestsociety.org](mailto:bhotz@forestsociety.org)
8. Total number of clients served through this grant funding:

This grant funding ultimately serves the 1.3 million residents of New Hampshire - the general public of all ages (and their pets!) - seasonal visitors to the region and wildlife that relies on the habitat of the reservation. Most immediately, this grant funding serves residents living nearby and in the towns surrounding the Forest Society's High Blue Reservation in Walpole, and visitors to the region who seek and enjoy outdoor recreation. Accurate counts are not available because our reservations are mostly free and open to the public. However, surveys indicate that more than 200,000 people visit our reservations annually.
9. Describe the project's key outcomes and results based on the goals and objectives:

We achieved the primary goals to enlarge the Forest Society's High Blue Reservation in Walpole, NH and to leverage future land transactions to conserve additional abutting properties of high quality habitat and conservation value to support Climate Change Resiliency and low-impact recreation.

We achieved the primary objective by securing funds to cover the purchase price, transaction and stewardship costs and conduct all steps needed to purchase and close on the 75-acre land project before the December 31, 2017 deadline, which fulfilled the conservation mission to permanently protect the property and add to our High Blue Reservation.

In addition, we were able to resume conversations with abutting property owners to consider a similar land transaction in order to expand the High Blue Reservation further by protecting additional acreage of high quality habitat and conservation value to support Climate Change Resiliency and low-impact recreation.
10. Please describe any challenges/obstacles the organization encountered (if any) in attaining stated goals & objectives:

The organization did not encounter any challenges or obstacles in attaining the goals and objectives of this conservation effort. This project had great local support, a cooperative seller and no complications with the transaction.
11. How did the organization overcome and/or address the challenges and obstacles?

Not applicable (see question 10).

12. Describe any unintended positive outcomes as a result of the efforts supported by this grant. Briefly describe the impact this grant has had on the organization and community served.

The greatest outcome of the conservation project was the deepening of our relationship with the neighbors and donors to our High Blue Reservation. This reservation is located in a rural area, but is treasured by the people who abut or live near the property. Many of those neighbors walk or hike the property, sometimes daily. One donor in particular who contributed \$50,000 to this conservation effort had previously made a large gift to an earlier addition to the reservation. Another outcome is the reconnection with an abutting landowner who owns nearly 150 acres. Many years ago when the original land acquisition of this reservation occurred, he suggested he would leave us his abutting land in his will. We were able to use this recent conservation project to rekindle that relationship.

This grant was highly important to the success of the project. The grant was instrumental in leveraging a \$50,000 donation. The local donor wanted to know that other funding could be raised for this project before he would commit his funding. Securing this generous grant from the S. L Gimbel Foundation demonstrated to him that the project would be completed successfully and he proceeded in providing significant support.

13. Please provide a narrative on how the funds were used to fulfill grant objectives. Support documents (receipts, expense reports or marketing materials) can be emailed to [grant-info@thecommunityfoundation.net](mailto:grant-info@thecommunityfoundation.net) or faxed to 951-684-1911 or mailed to The Community Foundation, 3700 Sixth St. Suite 200, Riverside, CA 92501

- The Land Acquisition consisted of one parcel of land totaling 75 acres. The agreed sales price between the Forest Society and landowner to acquire the property was based on a qualified appraisal to determine the property's Fair Market Value of \$63,500.
- The total Transaction Expenses: Appraisal, Transfer Tax, Legal Fees, Title Report, Title Insurance, Recording Fees, Land Agent Staff Time was \$11,699. Due diligence activities mandated by Land Trust Alliance Standards and Practices for land trust organizations who have achieved accreditation status consist of and total: the Appraisal, \$1,500; State Transfer tax, \$476; Legal fees, \$2,191; Title report, \$498; Title Insurance, \$192; Taxes, \$23 and, Recording Fees, \$50. The Land Agent's time to communicate with the land owner and Forest Society members who donated to the project; coordinate all phases of the Real Estate Transaction, and direct administrative staff, etc. was 6.767 hours/week @ \$40/hour x 25 weeks = \$6,767.
- Fundraising Expenses for Mailings, Fundraising, Administrative and Communications Staff Time totaled \$1,825. We did not need to mount an extensive fundraising campaign due to one significant and smaller additional gifts from residents and members living near High Blue Reservation. Staff Time: President and Vice President for Development and Vice President for Communications and Outreach, 36.5 hours @ \$50/hour=\$1,825. (Includes donor visits, proposal writing and communications).
- The Overhead or General Overhead to reimburse the Forest Society for indirect costs, excluding purchase price is \$13,525 x 17% = \$2,299.
- The Stewardship cost to support Reservation Stewardship for upfront Improvements, the Legal Defense and Reservation Stewardship Endowment funds is \$8,478. This figure is based on a formula that calculates funds to provide annual taxes, boundary line maintenance, forest inventory and legal defense funds. The cost breakdown is: Up-Front Costs = \$3,150 (1 day of property inspection, 1 day of boundary line maintenance,

2 days of inventory – each at 2 staff x \$28.125/hour x 8hrs x 4 days = \$1,800; 6 days to update reservation management plan 1 staff x \$28.125/hour x 8hours x 6 = \$1,350; Legal Defense Funds, \$2,750 (one time contribution to pooled fund); Endowment , \$2,578 (Endowment draw to cover annual property taxes, 10 year cycle of boundary maintenance and 15 year cycle of forest inventory).

14. Please relate a success story:

As mentioned previously (see question 12), the Forest Society re-established its relationship with a landowner whose nearly 150-acre property abuts our High Blue Reservation. Many years ago when the original land acquisition of this reservation occurred, this landowner suggested he was considering leaving his abutting land to the Forest Society in his will. We were able to use this recent conservation project to rekindle that relationship.

Enclosures

Project Budget – estimated and actual

Invoices

*Forest Notes* Magazine article, Winter 2017-2018

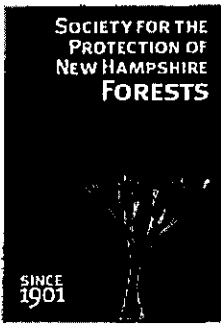
E-news video (sent by email)

Website article

## 2017 S.L. Gimbel Foundation Fund REPORT

### V. Project Budget – Estimated and Actual

Line Item Request	Estimated Line Item Explanation	Estimated Project Support	Amount Awarded by Gimbel/TCF	Actual Project Budget	Line Item Actual Total Project
Land Acquisition	One parcel of land totaling 75 acres, \$63,500	\$38,500	\$25,000	One parcel of land totaling 75 acres, \$63,500	\$63,500
Transaction Expenses	Appraisal, \$1,500; Transfer tax, \$476; Legal fees, \$2,200; Title report, \$1,200; Title Insurance, \$500; Recording Fees, \$80; Land Agent Staff Time, 2 hours/week @ \$40/hour x 25 weeks = \$2,000	\$7,956		Appraisal, \$1,500; Transfer tax, \$476; Legal fees, \$2,191; Title report, \$498; Title Insurance, \$192; Recording Fees, \$50; RE Taxes, \$23; Land Agent Staff Time, 6.767 hours/week @ \$40/hour x 25 weeks = \$6,767	\$11,699
Fundraising Expenses	Mailings, Grant proposals, private donor visits (see bullet #3 Narrative for breakdown - attached)	\$15,300		Mailings, Grant proposals, private donor visits (see bullet #3 Narrative for breakdown - attached)	\$1,825
Overhead	17% direct costs excluding purchase price and Stewardship funds	\$3,954		17% direct costs excluding purchase price and Stewardship funds	\$2,293
Stewardship	Easement monitoring, boundary maintenance and management in perpetuity (see bullet #5 Narrative for breakdown - attached)	\$8,478		Easement monitoring, boundary maintenance and management in perpetuity (see bullet #5 Narrative for breakdown - attached)	\$8,478
<b>TOTALS:</b>		<b>\$74,188</b>	<b>\$25,000</b>		<b>\$87,795</b>



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August 21, 2018

Ms. Celia Cudiamat  
Executive Vice President of Programs  
The Community Foundation  
3700 Sixth Street, Suite 200  
Riverside, CA 92501

Dear Ms. Cudiamat,

I am pleased to provide the final evaluation report for the \$25,000 grant awarded by the S. L. Gimbel Foundation to fund the land acquisition and conservation of property abutting the Forest Society's High Blue Reservation in Walpole, New Hampshire.

This grant provided critical support toward the purchase of this property, which further advances our larger vision of expanding blocks of conservation land to preserve ecological functions at a landscape level, to protect important wildlife habitat, to support climate change resiliency, and to assure permanent public access to this scenic area for hiking and other low-impact recreational activities.

Acquisition of this property also provided a link between our High Blue Reservation and other properties we are working to conserve. Generous support from the S. L. Gimbel Foundation leveraged additional funding for this project, and the completion of this project further leveraged support for the protection of these additional lands as well.

We are grateful to the S. L. Gimbel Foundation for its partnership on this project and look forward to other opportunities to work together in the future.

Sincerely,

Jane A. Difley  
President/Forester

JAD/dhf

Enclosures

