



2024 S.L. Gimbel Foundation Grant Application

Internal Use Only:
Grant : _____

Organization / Agency Information

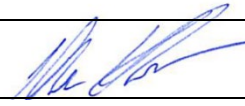
1)Organization/Agency Name: Society for the Protection of New Hampshire Forests		
2)Physical Address: 54 Portsmouth Street		City/State/Zip: Concord, NH 03301
3)Mailing Address: Same as physical address		City/State/Zip
4)CEO or Director: Jack Savage		Title: President
5)Phone: 603-224-9945	6)Fax: 603-228-0423	7)Email: info@forestsociety.org
8)Contact Person: Meredith Reed O'Donnell		Title: Foundation Relations Manager
9)Phone: 603-224-9945	10)Fax: 603-228-0423	11)Email: mreed@forestsociety.org
12)Web Site Address: www.forestsociety.org		13)Tax ID: 02-0222237

Program / Grant Information

Interest Area:

14)Program/Project Name: Campton Bog Land Protection Project			15)Amount of Grant Requested: \$68,500
16)Total Organization Budget: \$6,108,603	17)Per 990, Percentage of Program Service Expenses (Column B/ Column A x 100): 83%	18)Per 990, Percentage of Management & General Expenses Only (Column C / Column A x 100): 11%	19)Per 990, Percentage of Management & General Expenses and Fundraising (Column C+D / Column A x 100): 6%
20)Purpose of Grant Request (one sentence): to permanently conserve, and connect, a total of 750 acres of prime forest and ecologically significant peat-forming wetland within close proximity to the 800,000-acre White Mountain Forest and contributing to an abundance of natural resources, wildlife habitat, water quality, public access, scenic attributes, and health benefits enjoyed by local communities, in addition to absorbing significant amounts of carbon, in one of the fastest growing regions of New Hampshire.			
21)Program Start Date (Month and Year): January 2025 22)Program End Date (Month and Year): October 31, 2025			
23)Gimbel Grants Received: List Year(s) and Award Amount(s) 2013: Mount Major (land acquisition); 2017: High Blue Addition (land acquisition)			

Signatures

24)Board President / Chair: (Print name and Title) Drew Kellner, Board Chair	Signature: 	Date: 10/2/24
25)Executive Director/President: (Print name and Title) Jack Savage, President	Signature: 	Date: 10/2/24

2024 S.L. Gimbel Foundation Fund APPLICATION

Narrative

Please provide the following information by answering **ALL** questions (I to IV), **12 Font, One Inch Margins**. Use the format below (I to IV). Type your complete answers to the question directly below the question. Please do not delete the questions/instructions/examples and provide clear, specific, and concise answers.

I. Organization Background

A) State the history, mission and/or purpose of your organization.

The Society for the Protection of New Hampshire Forests (Forest Society) is a nonprofit land conservation organization that was founded in 1901 to protect New Hampshire's most important landscapes and promote the careful use of its renewable natural resources. Today, with 10,000 member households, the Forest Society owns 196 conservation properties in more than 100 communities, comprising 63,939 acres, and has interests and monitoring responsibilities on more 809 conservation easements covering 133,235 acres. Since its inception, the Forest Society has helped protect nearly one million acres across the state, including such premier natural landmarks as Franconia Notch, Crawford Notch, and Mount Monadnock. The Forest Society consistently ranks among the nation's top land trusts and has been a leader in setting the standard for American land protection.

In the 1970s, the Forest Society led the campaign for Current Use assessment, a tax incentive that has kept nearly half of New Hampshire's forest and farm land base open for productive conservation purposes. In the 1980s, the Forest Society initiated and led the state's Trust for New Hampshire Lands/Land Conservation Investment Program, which acquired 100,000 acres of working forests, parks, wildlife areas, and historic sites statewide. In the 1990s, the Forest Society led the effort to create the state's Land and Community Heritage Investment Program, which provides matching grants for land conservation and historic preservation in New Hampshire. And in 2019, the Forest Society and thousands of individuals and organizations around the state helped defeat Northern Pass, a project to construct high-voltage transmission towers across nearly 200 miles of the New Hampshire wildlife habitat, natural resource lands, and iconic viewsheds. The Forest Society works to conserve lands integral to the quality of life in communities; conserve sufficient working forest to support the equivalent of New Hampshire's wood product consumption and to sustain the forest economy; protect viable habitat for native wildlife species throughout the state; protect drinking water quality and aquatic resources; conserve prime agricultural soils; and mitigate climate change.

The Forest Society is the third oldest land conservation organization in the nation and the oldest and largest land conservation organization in New Hampshire. We estimate that our efforts directly or indirectly serve New Hampshire's 1.3 million residents, in addition to the millions of tourists who visit each year. The Forest Society is a nationally accredited member of the Land Trust Alliance, and we are proud to count 10,000 member households among our strongest supporters. Working with families, communities, other conservation partners, and state agencies, the Forest Society continues to pursue the conservation of land through conservation easements and fee ownership.

B) How long has the organization been providing programs and services to the community?

For the past 123 years, the Forest Society has been providing programs and services to communities across New Hampshire.

C) What are some of your past organizational accomplishments (last three years)?

A handful of land protection highlights include the conservation of 3,700 acres of pristine wildlife habitat in Shelburne's Mahoosuc Highlands, with frontage along the Appalachian Trail; a 730-acre land conservation project in Berlin that connects a nearby neighborhood to miles of woodland trails; a 318-acre addition to the existing 385-acre Jennings Forest in New Durham, adding to a growing complex of protected acres in the Moose Mountains Region; a conservation easement on 400 acres at Deepwood Forest in Canterbury and Northfield, with community trails and wildlife viewing areas carefully managed by the landowners; and a conservation easement on 457 acres in Henniker and Hopkinton—a mix of habitat linking already protected parcels. While smaller than our typical land-protection projects, the addition of 10 acres to an existing easement in the Upper Connecticut River watershed and the addition of a 20-acre easement in Sugar Hill protect water quality and unparalleled views, respectively. These land acquisitions, among others secured in the past three years, expand wildlife habitat, safeguard natural resources, and provide people of all ages with access to outside nature destinations. Some of these land conservation achievements developed due to their proximity to abutting properties recently protected by the Forest Society that inspired landowners to pursue a conservation outcome for their own land; others by families intent on helping the Forest Society piece together protected acres into larger, contiguous landscapes for wildlife habitat and natural resources protection; and still others by landowners who want to create an outdoor community resource for everyone to enjoy, in perpetuity.

We are also pleased to report that our net-zero North Country conservation and education center at The Rocks, in Bethlehem, is renovated and open to the public for outreach, education, and recreation programs. Now in full service, the energy-efficient solar and geothermal systems provide a clean energy alternative to fossil fuels, and exhibits created by Upswell, an award-winning design studio based in Portland, Oregon, enhance the visitor experience and pay tribute to the Glessner family and the region at large while also highlighting the Forest Society's role in natural resources conservation in the northern reaches of the state. In addition, we have completed renovations to the restroom facility at Creek Farm in Portsmouth. This outbuilding is situated adjacent to the Education Center and is open to campers and other visitors who venture out to this 36-acre creek-side property on the outskirts of downtown Portsmouth. Finally, we have recently completed a major trail rehabilitation project at Mt. Major, in Alton. This past summer, Town 4 Trail Services and OBP Trailworks rebuilt a portion of the severely eroded Blue Trail, the quickest and steepest route to Mt. Major's iconic summit view, into a sustainable trail with improved tread, drainage, and overall design.

II. Project Information:

A) Statement of Need

Specify the community need(s) you want to address and are seeking funds for. Include demographics, geographic characteristics of the area or community to be served, community conditions and income level. Include relevant statistics.

The Forest Society has been approached by three landowners with the unique opportunity to permanently conserve three parcels for a total of 750 acres of connected, ecologically significant forest and peat wetland in Campton and neighboring Rumney, NH, right on the

border of the White Mountain National Forest. Known collectively as the “Campton Bog” project, these parcels are located in the Lakes Region, one of the fastest growing regions of the state, according to the New Hampshire Fiscal Policy Institute, where strategic land and resources conservation is paramount to sequestering carbon and protecting wildlife habitat and migration routes, free public access to outdoor recreation destinations, rural character, and water quality. This project meets conservation goals set by local municipalities, regional and statewide conservation organizations, and public agencies located in New Hampshire.

Campton and Rumney support this land conservation project.¹ Located in Grafton County, Campton and Rumney are rural towns with a combined population of roughly 4,600 residents and each between fifteen to twenty minutes north of Plymouth, the largest nearby municipality, with an estimated year-round population of 6,600 residents and, during the academic year, an additional 7,100 undergraduate and graduate students attending Plymouth State University. More populous than Rumney, at 3,300 people, Campton also skews younger, with a median age of 42.4 years and a median family income of \$108,295; the poverty rate in Campton is 4.3 percent. The median age in Rumney is 55.9 years, with a median family income of \$83,875 and a poverty rate of 9.1 percent. The poverty rate in Grafton County stands at 10.2 percent, compared to the statewide average at 7.2 percent. Both towns are administered by selectboards, and both towns have master plans and conservation commissions, each of which acknowledges the vital role of local natural resources—forests, fields, ponds, lakes, and rivers—in the health and wellbeing of the community, while also recognizing the importance of growth to support additional residences and industry that pays a living wage. Guided by the town’s master plan, Campton also utilizes a zoning ordinance and zoning board to address development in town. Rumney does not have a zoning board, but worked with the Society for the Protection of New Hampshire Forests in 2007 to draft a natural resources inventory. Campton measures 51.9 square miles and contains an estimated 1,700 housing units (66 people per square mile), with approximately 25 building permits issued each year. Rumney measures 41.2 square miles and contains 824 housing units (36.4 people per square mile), issuing anywhere from 1 to 15 building permits each year.

The 2016 master plan for Campton states that “the current forested lands in the east and west [where the 750 acres is located], that extend to the surrounding mountains and the White Mountain National Forest, are the ones that could be most affected by poorly executed growth and development” (3); the master plan includes the goal of protecting natural resources in the Campton Bog region to “maintain quality water bodies and wetlands” and “protect biodiversity and wildlife habitats” (30). Similarly, the 2012 master plan for the town of Rumney states that the “natural resources of Rumney are integral with all aspects of [the] community – business and economics, public health and well-being, environmental quality and clean water, aesthetics and recreation” (25).

The 750 acres is also located in a **focus area for the Lakes Region Conservation Plan** (2011/2017), a public-private collaboration between New Hampshire Fish and Game, the Forest Society, Lakes Region Conservation Trust, Squam Lakes Conservation Society, and Newfound Lake Region Association. Updated in 2017, this conservation plan ranks nearly 420,000 acres as the conservation focus area for the Lakes Region; roughly 200,000 acres of the focus area is protected. In addition to input provided by staff at these organizations, data provided by the *New Hampshire State Wildlife Action Plan* (2015), New Hampshire Department of Environmental Services on drinking water protection areas, and The Nature

¹ Demographic information and other statistics derived from these two websites: U.S. Census Bureau and Granite Stats.

Conservancy’s 2016 report *Resilient and Connected Landscape for Terrestrial Conservation* contributed to this publication. The **Lakes Region Planning Commission**, located in Meredith, also provides extensive guidance related to regional natural resources protection through its master plan and natural resources inventory.

The Lakes Region of central New Hampshire encompasses 41 towns, including all of Belknap County and portions of Carroll, Grafton, and Merrimack Counties, and approximately 224 ponds and lakes—most notably, Lake Winnepesaukee, Squam Lake, and Newfound Lake—covering about 20 percent of the land area in the state. An estimated 128,094 people live in the region year-round, with tens of thousands more inhabiting seasonal homes during the warm-weather months. Geographically, this region functions as a transitional landscape between southern and northern New Hampshire, with the Belknap, Ossipee, and Sandwich Mountain Ranges, among others, forming the foothills to the higher-elevation White Mountains.

Easy access to outdoor amenities that offer spectacular views makes the Lakes Region an exceedingly popular destination. According to Dean Runyon Associates (travelstats.com), in 2023, an estimated \$766.8 million was spent in the region across retail sale; food service; local transportation and gas; arts, entertainment, and recreation; accommodations; and food stores, with the summer season yielding the highest dollar amounts. Much of this spending is attributable to hiking, water-related, and other outdoor activities. Less than a two-hour drive from Boston, Massachusetts, and other urban centers to the south, each year the Lakes Region attracts millions of day trippers, campers, and second-home, seasonal residents. And while Lake Winnepesaukee is the big draw during the warm-weather months, places like Mt. Major attract upwards of 80,000 visitors annually from all over the world, with thousands more exploring trails in the Belknap Range, nearby in the Ossipees, and just beyond in the White Mountain National Forest.

No doubt, the increasing number of people visiting, moving to, and building in Lakes Region communities contributes to the regional economy. Yet, dramatic growth in population and building starts—especially evident during and since the pandemic—can fracture connected open space that supports climate resiliency and biodiversity made possible by existing topography, land types, and natural resources. By working to conserve these 750 acres, the Forest Society is supporting a goal shared among local, regional, and statewide entities to conserve, and connect, parcels of land that safeguard water quality and plant and wildlife habitat while also supporting the economy and protecting access to public outdoor recreation opportunities in this region.

B) Project Description

1. Describe your project. How does your project meet the community need?

The Forest Society is working with multiple landowners to conserve a total of 750 acres, in Campton and Rumney, NH, through the purchase of conservation easements on three abutting properties measuring 456 acres, 210 acres, and 79 acres respectively. Known collectively as the “Campton Bog project,” roughly 43 percent, or 319 acres, of the 750-acre project includes Campton Bog, a 500-acre wetland just northwest of Lake Winnepesaukee, with the remaining forested acres acting as a protective buffer surrounding the wetland portion of the property and sheltering sections of Avery and Bog Brooks, which supply water to Campton Bog. Technically a *fen*—a type of peat-forming wetland fed by groundwater—Campton Bog drains into Bog Brook, which runs into the Pemigewasset River, a water source for the Merrimack River. The Merrimack flows south through southeastern New Hampshire and northeastern Massachusetts before entering the Atlantic Ocean at the Gulf of Maine.

Campton Bog project attributes are many, and include:

Plant and Wildlife Habitat: Campton Bog is a high-quality peat wetland complex of regional significance. Peatlands like Campton Bog are biologically diverse habitat containing an estimated 550 different plants, including sheep laurel, leather-leaf, willows, pitcher plants, and sundews; many of these plants are highly specialized to their environment. An ecological assessment of the property indicates sightings or evidence of a variety of amphibians such as the red spotted newt, redback salamander, bullfrogs, green frogs, and northern spring peeper; reptiles such as snapping turtles and eastern garter snakes; fish, including the eastern brook trout and blacknose dace; waterfowl such as the Canada goose and wood duck, in addition to Cooper's hawk, ruffed grouse, wild turkey, mourning dove, barred owl, hair woodpecker, eastern phoebe, great crested flycatcher, bluejay, American crow, veery, eastern bluebird, and gray catbird, among many others. The Campton Bog project also provides habitat for black bear, deer, moose, otter, and beaver, in addition to other wildlife.

The New Hampshire Fish and Game Department's *New Hampshire Wildlife Action Plan* (2020) identifies approximately 3 percent of the Campton Bog project as "highest ranking habitat by ecological condition in the state" (tier 1); 41 percent as "best habitat in bioregion" (tier 2); and 56 percent as "supporting habitat" (tier 3).

Wetland Resources: the Lakes Region holds more than 50 percent of all surface water in New Hampshire, and serves as the headwaters for the Merrimack River, which provides drinking water to more than 700,000 people in southeastern New Hampshire and northeastern Massachusetts. The Campton Bog project includes more than 3 miles of streams (prime habitat for native brook trout), including significant shoreline along Bog Brook and Avery Brook, which eventually drain into the Merrimack. This particular landscape also sequesters significant amounts of carbon. The environmental conditions are such that plant and animal material take a very long time to decompose. This organic material contains carbon and other nutrients, storing it away and slowly releasing it into the atmosphere. According to the USDA, worldwide, fens store the equivalent of 76 billion car emissions each year. It is particularly important to conserve the forested landscape surrounding the bog, as this area provides a buffer that, among other services, helps protect the quality of the water flowing into the streams and bog.

Climate Change Resiliency and Connectedness: based on The Nature Conservancy's "Resilient Land Mapping Tool," the Campton Bog project is "slightly above average" for *resiliency, local connectedness, and landscape diversity*. The hundreds of water bodies, population centers, and roadways located throughout the Lakes Region make connectivity particularly challenging. Fortunately, strategic land protection in this area is guided in large part by the *Lakes Region Conservation Plan* (2017), which identifies high priority conservation areas that, when conserved, link together to form a protected movement corridor that also has the capacity to support a diversity of animals and plants as they migrate northward due to climate change.

Once conserved, these adjoining parcels, just mere acres from the 800,000-acre White Mountain National Forest, will form another piece of the conserved and connected land map in this part of the state.

Recreation: public access is allowed for hiking, fishing, and kayaking, with visitors to the property no doubt enjoying spectacular views of the surrounding mountains from Campton

Bog. Snowmobiling is allowed via an established state designated snowmobile trail that runs through a portion of the property.

By conserving these 750 acres, the Forest Society helps Campton and Rumney meet local conservation goals and the state and other non-profit partners, including the Forest Society, meet regional conservation goals by helping to protect natural resources, water quality, wildlife habitat, and public access to open space, in addition to strategically connecting land that contributes to landscape-scale resiliency; celebrates rural character; and mitigates climate change.

2. What is unique and innovative about this project?

A high-quality nutrient-rich peat wetland complex like the Campton “Bog” fen makes a significant contribution to carbon sequestration, storing up to twice as much carbon as forests. According to the USDA, peat wetlands cover an estimated 3 percent of the Earth’s land area and provide habitat and nutrition for insects and wildlife and habitat for rare plants and exemplary natural communities specific to that region.

This project guarantees that three separate parcels will forever become one protected landscape within a larger landscape that includes the nearby 800,000-acre White Mountain National Forest. By conserving adjoining parcels, we are able to expand the amount of land capable of supporting natural resources, wildlife habitat and migration routes, and public access to outdoor natural destinations. This type of strategic land protection also contributes to connectivity and, ultimately, a more resilient landscape. We anticipate this project will help leverage future land protection projects in this region.

C) Project Goal, Objective, Activities and Expected Outcome

1. **Note: Objective, Outcome and Evaluation must all be based on the SAME QUANTIFIABLE CRITERIA (for example, “number served, or acres improved”).**
This quantifiable criteria should refer to the grant amount you are requesting from the Gimbel Foundation only and not the total program.

State ONE GOAL, ONE OBJECTIVE, ONE OUTCOME. USE NUMBERS AND DO NOT USE PERCENTAGES.

2. **State ONE project goal.** The Goal should be an aspirational statement, a broad statement of purpose for the project.
3. **State One Objective.** The Objective should be specific, measurable, verifiable, action-oriented, realistic, and time-specific statement intended to guide your organization’s activities toward achieving the goal. Specify the activities you will undertake to meet the objective and number of participants for each activity.
4. **State One Outcome.** An outcome is the individual, organizational or community-level change that can reasonably occur during the grant period as a result of the proposed activities or services. What is the key anticipated outcome of the project and impact on participants? State in a quantifiable and verifiable term.
5. **Evaluation:** How will progress towards the objective (per above) be tracked and outcome measured? Provide specific information on how many individuals will be evaluated (should be the same number as in the objective and outcome), how you will collect relevant data and statistics that meet your objective and validate your expected outcome, in a quantifiable manner, as you describe your evaluation process.

BELOW IS AN EXAMPLE OF GOAL, OBJECTIVE, OUTCOME AND EVALUATION:
Objective, Outcome and Evaluation should align and should be written in a linear format, using actual numbers, and data that are quantifiable and verifiable. Do not use percentages)

GOAL: Enhance and supplement the diet of food insecure families and children in Mariposa County with healthy, fresh food each month to improve their health and wellbeing.

OBJECTIVE: Distribute at least **500,000 meals of healthy, fresh food to 7,000 unduplicated residents in need.**

ACTIVITIES:

- 1) Purchase fresh produce and other food items not provided by existing local farm and USDA sources to support 7,000 unduplicated food distribution participants.
- 2) Continue to promote monthly food distribution program through community partners across the county.
- 3) Input monthly food distribution data into USDA database system.

OUTCOME: We expect to **provide 500,000 meals to 7,000 unduplicated food insecure county residents**, increasing their healthy food intake and habits.

EVALUATION: Using the USDA's tracking system we will generate reports on the number of food insecure children and families we have served. We will track our role in **providing 500,000 meals feeding 7,000 unduplicated food insecure individuals** and account for additional success or lower numbers of individuals served.

WRITE YOUR RESPONSES using the following format for your goal, objective, respective activities and expected outcome:

GOAL: the goal of the Campton Bog project is to increase the amount of connected conservation land in the Lakes Region of New Hampshire that will contribute to enlarging the climate-resilient landscape, supporting natural resources, wildlife, and public access.

OBJECTIVE: secure funds, or commitment of funds, in the amount of \$997,276 to cover the purchase price and stewardship and transaction costs needed to purchase conservation easements on three project parcels by **October 31, 2025**.

ACTIVITIES: launch public fundraising campaign, with outreach to private foundations and individuals; complete boundary line survey; schedule, as needed, group hikes and individual walks with major donor prospects; coordinate media outreach to newspapers and through website articles and direct mail; feature the project in our Forest Notes membership magazine; coordinate regional mailing to an anticipated 3,000 households; secure funds, or commitment of funds, sufficient to cover the purchase price, transaction costs, and stewardship costs associated with the three parcels totaling 750 acres; close on the conservation easements.

OUTCOME: secure funds, or commitment of funds, in the amount of \$997,276 to cover the purchase price and stewardship and transaction costs needed to purchase conservation easements on three project parcels by **October 31, 2025**, thereby fulfilling the mission to permanently conserve land within the Campton Bog project, which will contribute toward conservation goals established by the Forest Society, the towns of Campton and Rumney, and conservation partners at the regional and state levels.

EVALUATION: utilize the outreach and public awareness of this land campaign to initiate

and/or resume conversations with property owners within the region, in an effort to conserve land, and connect conserved land, encompassing natural resources and high-quality plant and wildlife habitat that mitigates climate change and creates a more resilient landscape that can support plants and animals in a changing climate.

The Forest Society maintains landowner outreach and results using Salesforce's LOCATE database monitoring and tracking system.

D) Timeline

Provide a timeline for implementing the project. The start date and end date should be the same dates on the cover page. Start date should be 3 months AFTER the submission deadline.

The project start date is: January 2025

The project end date is: **October 31, 2025**

Include timeframes for specific activities, as appropriate.

The main activities falling within the public phase of this land protection campaign include:

- Pulling together communications and fundraising collateral (video, photos) – late fall/winter 2024
- Boundary survey: Jan 2025
- Fundraising appeal in Forest Notes: winter 2024-25 (Feb 2025)
- Broad-based fundraising campaign grants and letter to surrounding towns: Feb-March 2025
- Complete Fundraising: summer/early fall 2025
- Closing: fall 2025

It was necessary for the Forest Society to gather specific information that would inform the decision of whether to move ahead with this land conservation project and, if we did, the public fundraising phase. With information and approvals, the public fundraising phase of this project will start in earnest at the beginning of 2025. These activities included coordinating a property inspection; determining estimate for easement values; seeking committee and board approval; signing a purchase and sales agreement; seeking project endorsements from Campton and Rumney; coordinating title review and phase I environmental analysis; and moving ahead with federal and state grant program applications.

E) Target Population

1. Who will this grant serve?
2. How many people will be impacted? Provide a breakdown: Number of Children, Youth, Adults, Seniors.

The grant will ultimately serve the general public of all ages, including nearby residents and visitors exploring the property by land or water. Accurate counts are not available because our conservation properties are mostly free and open to the public. However, surveys indicate that more than 200,000 people visit our Forest Society conservation properties annually.

F) Community Partners

1. How does this program relate to other existing projects in the community?

The towns of Campton and Rumney have each protected land for public access, including West Branch Forest, Blair Woodland Natural Area, and Pattee Conservation Park, in Campton, and Jim Darling Natural Area and Rumney Rocks, in Rumney.

Currently, the Forest Society is working to conserve 375 acres just south of Lake Winnepesaukee. Located on the southern border of the Forest Society's 680-acre Evelyn H. and Albert D. Morse, Sr. Preserve, in Alton, once conserved, these 375 acres will expand Morse to 1,065 acres, enlarging the connected conservation land to 1,630 acres that also includes the Alton Town Forest, Adison Cate Preserve, and Alton Bay State Forest. The Forest Society is also working with a landowner in Groton, NH, interested in donating a conservation easement on 1,100 acres of well-managed forest with elevations of 2,000 feet and brooks that drain into Newfound Lake. This property is located about twenty minutes due south of Rumney.

Lakes Region Conservation Trust (Center Harbor) is working on at least ten projects, totaling 1,500 acres, throughout area. Projects include 96 acres in Sandwich and 320 acres in Sanbornton, among others.

Also active in the area is the all-volunteer Pemi-Baker Land Trust (Rumney), which owns and manages conservation lands open to the public, including Quincy Bog Natural Area and Baker Forest.

2. Who are your key community partners? Provide a brief description of each key partner and their role(s) in this program.

The Forest Society's key community partners for the Campton Bog project include the towns of Campton and Rumney. Conservation Commission volunteers in each town have offered to lead tours of the project site in spring 2025. We also consider each of the landowners involved in this project a Forest Society partner. Two of the landowners are offering easements on their land at a bargain sale price, and all three of the landowners will manage their land utilizing a forest management plan.

3. How are you utilizing volunteers?

As part of the public fundraising stage of this project, conservation commission volunteers from Campton and Rumney have agreed to lead public hikes on the property.

G) Use of Grant Funds

How will you use the grant funds? This answer should align with the specific activities previously outlined in C) Project Goal, Objectives, Activities and Expected Outcomes

Grants funds will go toward costs associated with the purchase of conservation easements on three parcels totaling 750 acres, which will help leverage other foundation grants and individual funding to fully fund the land purchase, transaction and fundraising costs, legal defense, and endowment fund.

III. Project Future

A) Sustainability

Explain how you will support this project after the grant performance period. Include plans for fundraising or increasing financial support designated for the project.

Securing funds for stewardship in perpetuity is included in the project and fundraising plan for this project. The Forest Society's annual operating budget includes support for stewardship and monitoring.

IV. Governance, Executive Leadership and Key Personnel/Staff Qualifications

A) Governance

1. Describe your board of directors and the role it plays in the organization.

The Forest Society is governed by a board of trustees composed of 18 members with diverse professional backgrounds. The trustees are elected for three-year terms at the annual membership meeting. The board holds six regular meetings per year. Management decisions are addressed by a Leadership Team composed of the president and two vice presidents (Land Protection and Development/Membership), in addition to additional program heads across these programs: land protection; education, outreach, and communications; conservation planning; advocacy; and sustainable forest management. Project execution is coordinated under the supervision of program heads. Program activities are conducted by the staff with the assistance of 350 volunteers, including citizen scientists and 175 land stewards, who monitor and help maintain conservation properties through annual workdays and special projects.

2. What committees exist within your board of directors?

Program areas receive guidance from the board through board committees consisting of both trustees and members selected for their expertise in the program area. Committees include: Audit, Development, Executive, Finance, Investment Sub-Committee, Land Protection, Outreach, Policy Advisory, Stewardship, Trustee Leadership & Governance and President's Forester Council.

3. How does the board of directors make decisions?

Board decisions are made by majority vote following recommendations from board committees and staff.

B) Management

1. Describe the qualifications of key personnel/staff responsible for the project.

Brian Hotz, Vice President for Land Conservation

Brian J. Hotz is the vice president for land conservation for the Society for the Protection of New Hampshire Forests. The Forest Society is a non-profit, membership supported organization with a mission of conserving land and other natural resources. Founded in 1901, the Forest Society is the state's oldest and largest land conservation organization. Brian has a masters in science from the University of Wisconsin's Land Resources Program and completed a master's thesis on implementing conservation easement programs. Brian previously worked for the Wisconsin Chapter of The Nature Conservancy and was the Executive Director of Gathering Waters, Inc., Wisconsin's education and technical assistance center for land trusts. Brian has worked at the Forest Society since 1998. His primary responsibility for the Forest Society is to oversee the Forest Society's Land Protection and Conservation Easement Stewardship Departments. Additionally, he is responsible for organizing and implementing the Forest Society's strategic land protection initiatives including the Quabbin-Cardigan

Conservation Initiative, Merrimack River Watershed Program, Lakes Region Conservation Plan and the Ashuelot River Land Conservation Plan.

Anne Truslow, Vice President for Development

Vice President for Development **Anne Truslow** will coordinate fundraising efforts related to the purchase of the Coskie Addition. With more than twenty years working in the field of environmental conservation, Anne has helped protect hundreds of thousands of acres across the United States. At the Forest Society, Anne coordinates all aspects of the organization's development and membership efforts. Prior to joining the Forest Society, Anne served as vice president and chief operating officer for the National Wildlife Refuge Association, where she managed a budget of \$3.2 million and served as program director and primary institutional fundraiser. Recognizing the importance of partnerships in land and wildlife conservation, Anne fostered strategic collaborations such as Partners for Conservation/Partnerscapes, a network of ranchers and farmers supporting conservation efforts on working lands, and the development of the U.S. Fish and Wildlife Service's Urban Wildlife Refuge Program. A 1990 graduate of Middlebury College, Anne has earned additional credentials and training from Duke University and Yale University Center for Business and Environment.

2. What is the CEO/President/Executive Director Salary? \$165,000

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V. Project Budget and Narrative (Do not delete these instructions on your completed form and use this form).

A) **Budget Table:** Provide a detailed line-item budget for your **entire** program by completing the table below. Note that if funded, this is the budget that you will have to refer to in the Evaluation (Final) Report. A breakdown of specific line item requests and attendant costs should include:

1) Line item requests for materials, supplies, equipment and others:

a. Identify and list the type of materials, supplies, equipment, etc.

b. Specify the unit cost, number of units, and total cost

c. Use a formula/equation as applicable. (i.e. 40 books @ \$100 each = \$4000)

2) Line item requests for staff compensation, benefits: **Do not use FTE percentages.** a. Identify the position; for each position request, **specify the hourly rate and the number of hours** (i.e. \$20/hr x 20 hours/week x 20 weeks = \$8,000)

b. For benefits, provide the formula and calculation (i.e. \$8,000 x 25% = \$2,000)

3) Line items on Salaries/Personnel included in budget (contribution or in-kind) but NOT requested from the Gimbel Foundation must be broken down per number 2) above: Provide rate of pay per hour and number of hours.

4) The Gimbel Foundation **does not fund indirect costs.**

Line Item Request	Line Item Explanation	Support From Your Agency	Support From Other Funders	Requested Amount From Gimbel	Line Item Total of Project
Land Conservation (Easements)	3 parcels totaling ~750 acres (\$310,000 + \$200,000 + \$217,000)		\$744,000		\$744,000
Transaction Expenses	real estate tax (\$4,568); professional services (\$4,650); preliminary appraisal (\$12,800); final appraisal (\$16,000); environmental assessment (\$5,400); surveys (\$55,000); baseline documentation report (\$2,000); legal review and closing (\$13,500); title report (\$9,755); title insurance (\$2,400); recording fees (\$200); project mgt. & mileage (\$17,100)		\$74,873	\$68,500	\$143,373
Fundraising and Communication	mailings (\$5,000); development staff time (donor visits/events, grant proposals @ \$4,000)		\$9,000		\$9,000
Overhead	17% direct costs excluding purchase price and conservation easement endowment		\$25,903		\$25,903
Legal Defense and Endowment	Easement monitoring and reporting; legal defense		\$75,000		\$75,000
TOTALS:			\$928,776	\$68,500	\$997,276

B) Narrative: The budget narrative is the justification of “how” and/or “why” a line item helps to meet the program deliverables. Provide a description for each line item. Each line item must have a narrative. Explain how the line item relates to the program. If you are requesting funds to pay for staff, list the specific duties of each position. See attached SAMPLE Program Budget and Budget Narrative.

Land Conservation Easements

The agreed upon price between the Forest Society and landowner to acquire conservation easements on 3 parcels based on qualified appraisals to determine each property’s Fair Market Value. Parcel 1 (476 acres) @ \$310,000 + Parcel 2 (210 acres) @ \$200,000 + Parcel 3 (79 acres) @ \$234,000 = \$744,000.

Transaction Expenses

Due diligence activities mandated by Land Trust Alliance Standards and Practices for land trusts that have achieved accreditation status.

Transaction Expenses for three parcels: real estate transfer taxes (.75%/purchase price); professional services (natural resources inventory, wetland studies); preliminary appraisal; final appraisal; environmental assessment; surveys; baseline documentation report; legal review and closing; title report; title insurance; land agent staff time (communication with landowner; coordinate all phases of real estate transaction)

Rough Breakdown/Parcel

Parcel 1: real estate transfer tax (\$2,400); professional services (\$4,650); preliminary appraisal (\$4,200); final appraisal (\$4,000); environmental assessment (\$1,800); survey(s) (\$25,000); baseline documentation report (\$2,000); legal review and closing (\$7,500); title report (\$7,055), title insurance (\$1,200), recording fees (\$200); land agent staff time (137 hours x \$73/hr.= \$10,001); travel (746 miles x \$.67= \$500)

Parcel 2: real estate transfer tax (\$1,500); final appraisal (\$6,000); environmental assessment (\$1,800); survey(s) (\$15,000); legal review and closing (\$3,000); title report (\$1,500); title insurance (\$600); land agent staff time (41 hours x \$73/hr.= \$2,993); travel (448 miles x \$.67= \$300)

Parcel 3: real estate transfer tax (\$668); preliminary appraisal (\$4,300); final appraisal (\$6,000); environmental assessment (\$1,800); survey(s) (\$15,000); legal review and closing (\$3,000); title report (\$1,200); title insurance (\$600); land agent staff time (41 hours x \$73/hr.= \$2,993); travel (448 miles x \$.67= \$300)

Development and Communication Expenses

mailings; fundraising/proposals; donor visits; communications

- 5,000 pieces x ~\$1.00/piece = \$5,000 (includes printing and postage)
- Development staff (proposals): \$40/hr. x 15 hrs. = \$600
- VP Development/President (communications/visits): \$70/hr. x 40 hrs = \$2,800
- Communications: \$40/hr. x 15 hrs. (project media): \$600

Overhead

Reimburse the Forest Society for indirect costs, excluding purchase price of easements.

* Parcel 1: \$13,516 * Parcel 2: \$6,290 * Parcel 3: \$6,098

Legal Defense and Conservation Easement Endowment

Contribution toward funds to cover legal and monitoring fees associated with property.

* Parcels 1, 2, and 3: \$5,000/ea. (legal defense); \$20,000/ea. (endowment)

2024 S.L. Gimbel Foundation APPLICATION

VI. Sources of Funding: Please list your current sources of funding and amounts.

Secured/Awarded

Name of Funder: Foundation, Corporation, Government, Individual donors, In-Kind, Other (specify)	Amount
Landowner Bargain Sale	\$217,000
NRCS RCPP Grant Program (proposal approved; awaiting distribution of funds)	\$372,000
NH LCHIP (proposal approved; awaiting distribution of funds)	\$197,000
NH Moose Plate Grant (proposal approved; awaiting distribution of funds)	\$30,000

Pending

Name of Funder: Foundation, Corporation, Government, Individual donors, Other (specify)	Amount	Decision Date
Town of Campton	\$20,000	Winter 2025
S.L. Gimbel	\$68,500	January 2025
Private Foundations and Individual Contributions	\$92,776	Planned

Please note: the Forest Society holds a Land Action Fund that is available to advance funding as needed until private fundraising is complete; if needed, we also have access to a line of credit. Our private fundraising work will launch in January 2025, and the project will be featured in the winter 2025 issue of our membership magazine, Forest Notes. We are thrilled to report we have received notification that our NRCS RCPP, LCHIP, and Moose Plate grants have been approved, for a total of \$599,000 in grant funding awarded, to date. This information should remain confidential until awards are announced publicly.

Diversity of Funding Sources: A financially healthy organization should have a diverse mix of funding sources. Complete those categories that apply to your organization using figures from your most recent fiscal year.

Funding Source	Amount	% of Total Revenue	Funding Source	Amount	% of Total Revenue
Contributions	\$5,242,949	44%	Earned Income	\$1,290,786	11%
Fundraising/Special Events	0	0%	Investment Income	\$807,668	7%
Corp/Foundation Grants	\$858,977	7%			
Government Grants	\$3,602,503	31%			

Notes:

Earned income includes Christmas tree sales, forest operations, rental income and gift shop sales.

Investment income includes the board approved draw from our endowment.

S.L. Gimbel Foundation APPLICATION

VII. Financial Analysis

Agency Name: Nathan Wechsler & Company

Most Current Fiscal Year (Dates): From: May 1, 2023 To: April 30, 2024

This section presents an overview of an applicant organization's financial health and will be reviewed along with the grant proposal. Provide all the information requested on your **entire organization**. Include any notes that may explain any extraordinary circumstances. Information should be taken from your most recent 990 and audit. **Double check your figures!**

Form 990, Part IX: Statement of Functional Expenses

(This should be your recently filed Form 990 and should not be more than 2 years old)

1) Transfer the totals for each of the columns, Line 25- Total functional expenses (page 10)

(A) Total Expenses	(B) Program service expenses	(C) Management & general expenses	(D) Fundraising expenses
\$8,316,004	\$6,888,574	\$913,490	\$513,940

2) Calculate the percentages of Columns B, C, and D, over A (per totals above)

- Program services (B) – A general rule is that at least 75% of total expenses should be used to support programs
- Management & general administration (C) – A general rule is that no more than 15% of total expenses should be used for management & general expenses
- Fundraising (D) – A general rule is that no more than 10% of total expenses should be used for fundraising

(A) Total Expenses	(B) Program service expenses	(C) Management & general expenses	(D) Fundraising expenses
	Columns B / A x 100	Columns C / A x 100	Columns D / A x 100
Must equal 100%	83%	11%	6%

3) Calculate the difference between your CURRENT year budget for management & general expenses and your previous management & general expenses per your 990 (Column C)

Percentage of Organization's <u>Current</u> Total Budget used for Administration: 12%	Column C, Management & general expenses per 990 above: 11%	Differential: 1%
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If the differential is above (+) or below (-) **10%**, provide an explanation:

S.L. Gimbel Foundation APPLICATION

Quick Ratio: Measures the level of liquidity and measures only current assets that can be quickly turned to cash. A generally standard Quick Ratio equals 1 or more.

Cash	+ Accounts Receivables	/Current Liabilities	= Quick Ratio
\$2,458,050	\$481,782	\$481,577	6.1

Excess or Deficit for the Year:

Excess or (Deficit) Most recent fiscal year end: 0	Excess or (Deficit) Prior fiscal year end: 0
---	---

Notes:

In both fiscal years, a significant portion of the funds raised were to support land protection projects which all have individual budgets separate from the operating budget and may span several fiscal years. Including these project funds, we had increases in unrestricted net assets of \$2,206,083 in FY24 and \$2,116,235 in FY23 (see page 4 of our FY24 audited financial statements).

VIII. EMAIL TWO PDF files to Gimbel@iegives.org

A. One PDF file of the following, #1 to #5

B. Second PDF file of the following, #6 & #7

#1	Completed Grant Application Form (cover sheet, narrative), budget page and budget narrative (see sample) and sources of funding, financial analysis page	#6	A copy of your most recent year-end financial statements (audited)
#2	Your current operating budget and the previous year's actual expenses (see sample Budget Comparison)	#7	A copy of your most recent 990. Please make sure that the Form 990 you submit is no more than two (2) years old.
#3	Part IX <u>only</u> of the 990 form, Statement of Functional Expenses (one page). Please make sure that the Form 990 you submit is no more than two (2) years old.		
#4	For past grantees, a copy of your most recent final report.		
#5	A copy of your current 501(c)(3) letter from the IRS		

SAMPLE Budget Comparison

	Actuals Most Recently Completed Year	Budget Projections Current Year	Variance
	20____	20____	
Income			
Individual Contributions	-	-	-
Corporate Contributions	-	-	-
Foundation Grants	-	-	-
Government Contributions	-	-	-
Other Earned Income	-	-	-
Other Unearned Income	-	-	-
Interest & Dividend Income	-	-	-
Total Income	-	-	-
Expenditures			
Personnel			
Salary CEO – Required	-	-	-
Staff Salary (total)	-	-	-
Payroll Taxes	-	-	-
Insurance - Workers' Comp	-	-	-
Insurance - Health	-	-	-
Payroll Services	-	-	-
Retirement	-	-	-
Total Personnel	-	-	-
General Program/Administrative			
Bank/Investment Fee	-	-	-
Publications	-	-	-
Conferences & Meetings	-	-	-
Mileage	-	-	-
Audit & Accounting	-	-	-
Program Consultants	-	-	-
Insurance Expense	-	-	-
Telephone Expense - Land Lines	-	-	-
DSL & Internet	-	-	-
Website	-	-	-
Office Supplies	-	-	-
Postage & Delivery	-	-	-
Printing & Copying	-	-	-
Miscellaneous	-	-	-
Total General Program/Administrative	-	-	-
Total Expenditures	-	-	-
Revenue Less Expense	-	-	-

SAMPLE Project Budget and Budget Narrative

Line Item Request	Line Item Explanation	Support From Your Agency	Support From Other Funders	Requested Amount From TCF	Line Item Total of Project
Personnel: Project Coordinator	10 hours/week x \$20/hour x 40 weeks = \$8,000			\$ 8,000	\$ 8,000
Meetings	10 meetings x \$200/meeting for food and drinks = \$2,000		\$1,000	\$ 1,000	\$ 2,000
Training and Education: Honoraria-trainers	10 trainers x \$200/trainer = \$2,000			\$ 2,000	\$ 2,000
Materials and Supplies	\$40/student x 40 students = \$1,600	\$ 600		\$ 1,000	\$ 1,600
Workbooks	\$30 each x 40 students = \$1,200	\$ 200		\$ 1,000	\$ 1,200
Facility Cost	\$300/meeting x 10 meetings = \$3,000			\$ 3,000	\$ 3,000
Grant awards		\$5,000	\$5,000	\$10,000	\$20,000
Youth Recognition Event: Food	\$10/person x 100 people = \$1,000			\$ 1,000	\$ 1,000
TOTALS:		\$5,800	\$ 6,000	\$27,000	\$38,800

Budget Narrative:

1. Personnel: Project Coordinator

Coordinate all activities of the Youth Program such as setting meeting schedules, contacting students, preparing materials for meetings, scheduling trainers, etc.

10hrs/week x \$20/hr. x 40 weeks = \$8,000

2. Meetings: 10 meetings x \$200/meeting for food, drinks, snacks. There are 40 students per meeting. Cost per student is \$5 x 40 students = \$2,000

3. Training and Education: Honoraria for 10 trainers/presenters x \$200/trainer = \$2,000.

4. Materials & Supplies - paper, binders, pens, etc. for meetings, activities, events. 40 students x \$40 per student = \$1,600.

5. Workbooks: Leadership training workbooks costs \$30 each x 40 students = \$1,200

6. Facility cost – Room cost at a nonprofit agency is \$100/hour x 3 hours per meeting x 10 meetings = \$3,000

7. Grantmaking – Grant awards to nonprofit youth agencies. Maximum \$2500/agency x 8 = \$20,000

8. Youth Recognition Event – end of the year event for students and grantees.

100 attendees x \$10/person = \$1,000

Society for the Protection of New Hampshire Forests
Fiscal Year Operating Budget Comparisons

Society for the Protection of New Hampshire Forests Budget Comparison			
	FY 2024 Actual	FY 2025 Budget	Variance
Revenue			
Membership Dues	\$ 505,255	\$ 526,000	\$ 20,745
Annual Fund	\$ 775,170	\$ 706,000	\$ (69,170)
Bequests	\$ 402,914	475,000	\$ 72,086
Program Contributions	\$ 158,448	\$ 240,921	\$ 82,473
Grants	\$ 142,834	\$ 310,000	\$ 167,166
Sales & Stumpage Income	\$ 845,926	\$ 690,624	\$ (155,302)
Program Fees & Rent	\$ 443,867	\$ 543,639	\$ 99,772
Investment Income	\$ 969,133	\$ 755,657	\$ (213,476)
Transfer of Restricted Funds for Operations	\$ 1,458,613	\$ 1,184,436	\$ (274,177)
Transfer of Unrestricted Funds for Operations	\$ 166,590	\$ 665,338	\$ 498,748
Misc. Income	\$ 3,280	\$ 10,988	\$ 7,708
Total Revenue	\$ 5,872,030	\$ 6,108,603	\$ 236,573
Expenses			
Salary-CEO	\$165,000	\$165,000	\$0
Salaries (total, including CEO)	\$ 2,653,590	\$ 2,767,890	\$ 114,300
Benefits	\$ 726,078	\$ 760,130	\$ 34,052
Plant Asset Depreciation	\$ 271,857	\$ 416,343	\$ 144,486
Supls, Pstg, & Eqmt Mtce	\$ 171,566	\$ 173,163	\$ 1,597
Bldgs & Grounds	\$ 431,287	\$ 523,979	\$ 92,692
Travel, Conf & Dues	\$ 100,479	\$ 99,980	\$ (499)
Subscrip & Documents	\$ 31,577	\$ 32,264	\$ 687
Advertising & Printing	\$ 102,306	\$ 115,030	\$ 12,724
Professional Services	\$ 956,074	\$ 852,464	\$ (103,610)
Cost of Sales	\$ 77,901	\$ 112,600	\$ 34,699
Program/Event Expenses	\$ 72,757	\$ 76,060	\$ 3,303
Loan Interest	\$ 60,767	\$ 50,000	\$ (10,767)
Invstmnt & Misc Bk Fees	\$ 21,154	\$ 15,600	\$ (5,554)
Assistance to other Organizations	\$ 188,596	\$ 113,000	\$ (75,596)
Misc Expenses	\$ 6,041	\$ 100	\$ (5,941)
Total Expenses	\$5,872,030	\$6,108,603	\$ 236,573
Operating Budget Surplus (Deficit)	\$ -	\$ -	
Note: A significant portion of the funds raised each year are for land protection projects that have separate board-approved budgets and often span several fiscal years. See page 4 of the audited financial statements for the increase in unrestricted net assets for FY24 and FY23.			

**SOCIETY FOR THE PROTECTION OF NEW
HAMPSHIRE FORESTS**

Form 990 (2023)

-*2237 Page **10**

Part IX Statement of Functional Expenses

Section 501(c)(3) and 501(c)(4) organizations must complete all columns. All other organizations must complete column (A).

Check if Schedule O contains a response or note to any line in this Part IX ☒ **X**

Do not include amounts reported on lines 6b, 7b, 8b, 9b, and 10b of Part VIII.	(A) Total expenses	(B) Program service expenses	(C) Management and general expenses	(D) Fundraising expenses
1 Grants and other assistance to domestic organizations and domestic governments. See Part IV, line 21 ...	188,596.	188,596.		
2 Grants and other assistance to domestic individuals. See Part IV, line 22				
3 Grants and other assistance to foreign organizations, foreign governments, and foreign individuals. See Part IV, lines 15 and 16				
4 Benefits paid to or for members				
5 Compensation of current officers, directors, trustees, and key employees	222,968.	26,470.	160,350.	36,148.
6 Compensation not included above to disqualified persons (as defined under section 4958(f)(1)) and persons described in section 4958(c)(3)(B)				
7 Other salaries and wages	2,482,917.	1,807,345.	363,171.	312,401.
8 Pension plan accruals and contributions (include section 401(k) and 403(b) employer contributions)	69,205.	48,075.	12,021.	9,109.
9 Other employee benefits	401,576.	274,142.	73,496.	53,938.
10 Payroll taxes	203,000.	139,824.	37,178.	25,998.
11 Fees for services (nonemployees):				
a Management				
b Legal	92,919.	92,669.	250.	
c Accounting	29,200.		29,200.	
d Lobbying				
e Professional fundraising services. See Part IV, line 17				
f Investment management fees				
g Other. (If line 11g amount exceeds 10% of line 25, column (A), amount, list line 11g expenses on Sch O.)	833,955.	699,098.	133,555.	1,302.
12 Advertising and promotion	102,306.	100,743.		1,563.
13 Office expenses	171,566.	88,057.	30,384.	53,125.
14 Information technology				
15 Royalties				
16 Occupancy				
17 Travel	70,168.	65,523.	2,922.	1,723.
18 Payments of travel or entertainment expenses for any federal, state, or local public officials ...				
19 Conferences, conventions, and meetings	30,311.	16,442.	13,869.	
20 Interest	61,379.	61,379.		
21 Payments to affiliates				
22 Depreciation, depletion, and amortization	271,857.	253,043.	18,814.	
23 Insurance				
24 Other expenses. Itemize expenses not covered above. (List miscellaneous expenses on line 24e. If line 24e amount exceeds 10% of line 25, column (A), amount, list line 24e expenses on Schedule O.)				
a DONATED CONSERVATION EA	2,212,000.	2,212,000.		
b BUILDING AND GROUNDS	391,403.	376,326.	14,221.	856.
c CONSERVATION EASEMENTS	270,000.	270,000.		
d CREDIT LOSS EXPENSE/PLE	82,786.	82,786.		
e All other expenses SEE SCH O	127,892.	86,056.	24,059.	17,777.
25 Total functional expenses. Add lines 1 through 24e	8,316,004.	6,888,574.	913,490.	513,940.
26 Joint costs. Complete this line only if the organization reported in column (B) joint costs from a combined educational campaign and fundraising solicitation. Check here ☐ if following SOP 98-2 (ASC 958-720)				

INLAND EMPIRE COMMUNITY FOUNDATION

S. L. GIMBEL FOUNDATION FUND

Please complete the form and type your answers directly underneath the questions. Leave one space between numbered questions.

ORGANIZATION INFORMATION

1. Name of your Organization
Society for the Protection of New Hampshire Forests
2. Grant #
20170575
3. Grant Amount
\$25,000
4. Date Awarded (date on award letter)
9/29/2017
5. Grant Period (Indicate start date and end date per Grant Agreement)
9/15/2017 – 9/15/2018
6. Location of your Organization (City, State)
Concord, NH
7. Name and Title of person completing evaluation
Brian Hotz, VP for Land Conservation
8. Phone Number
603-224-9945, x 316
9. Email Address
bhotz@forestsociety.org

KEY OUTCOMES AND RESULTS

10. Total number of clients served through this grant funding:
 - A) Per original grant application, what is the estimated number served:

This grant funding ultimately serves the 1.3 million residents of New Hampshire, including seasonal visitors to the region and wildlife that relies on the habitat of this conservation property. Most immediately, this grant funding serves residents living in Walpole, NH (population ~3,700 people), and in the towns surrounding the Forest Society's High Blue conservation property, in addition to visitors to the region who seek outdoor recreation. Accurate counts are not available because our conservation properties are mostly free and open to the public. However, surveys indicate that more than 200,000 people visit our conservation properties annually.

B) Actual number served:

Please refer to response to item 10 A.

11. Describe the project's key outcomes and results based on the goals and objectives. (Include the program accomplishments as a result of the Gimbel grant AND for the entire program. Please make the distinction between the Gimbel funded program accomplishments and the total organizational program, as a whole).

Goal: enlarge the Forest Society's High Blue conservation property in Walpole, NH, and 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.

Activities: As part of this land protection project, the Forest Society completed these activities: appraised the land; inspected the property; received project approval by the Forest Society Land Protection Committee and the Forest Society Board of Trustees; received acceptance of offer to purchase the property by landowner; conducted boundary inspection and environmental analysis; wrote grants administered by public agencies; launched public fundraising campaign; conducted comprehensive land project fundraising campaign (outreach to foundations and area businesses, grant proposals, donor cultivation, media outreach); coordinated review and approval by legal counsel of the title report and environmental inspection report; secured funds sufficient to cover the purchase price, transaction and stewardship costs; closed on the land transaction.

Objective: In terms of specific quantifiable criteria:

A) Per original grant application: secure funds or commitment of funds to cover the purchase price, transaction and stewardship costs, and conduct all steps needed to purchase and close on the 72-acre addition to the existing High Blue conservation property.

B) Actual grant outcome, results, accomplishments: the S.L. Gimbel Foundation grant was directed toward the purchase price of this land-protection project, which enlarged the Forest Society's existing High Blue conservation property by conserving an additional 72 acres.

12. Describe any challenges/obstacles the organization encountered (if any) in attaining goals and objectives.

The Forest Society 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.

13. How did you overcome and/or address the challenges and obstacles?

Not applicable (see response to question 12).

14. Describe any unintended positive outcomes as a result of the efforts supported by this grant. The greatest outcome of the conservation project was the deepening of our relationship with the neighbors and donors to our High Blue conservation property. High blue is located in a rural area and 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 property.

Another outcome is the reconnection with an abutting landowner who owns nearly 150 acres. Many years ago, when the original land acquisition of this conservation property 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. Additionally, a timberland company that acquired a parcel adjacent to High Blue is seeking the permanent conservation of this property. This project is in the early stages of development.

This grant from Gimbel 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.

15. Briefly describe the impact this grant has had on the organization and community served. The grant from the S.L. Gimbel Foundation contributed to funding the purchase of 72 acres abutting our existing 224-acre High Blue conservation property in Walpole, NH, and helped leverage additional funding for this project. Situated within the Connecticut River watershed (the river extends from the Canadian border in northern New Hampshire to New York's Long Island Sound), this property protects water quality and wildlife habitat; mitigates climate change; and provides permanent public access for low-impact recreation, including access to a scenic trail that links to the trail network on the existing protected 224-acre parcel.

This project achieves the Forest Society's goals of expanding blocks of conservation land to preserve ecological functions at a landscape scale; protect important wildlife habitat; support climate change resiliency; and ensure permanent public access for hiking and other low-impact recreational activities.

Locally, High Blue contributes to the Walpole Conservation Commission's Ridge to River Greenway Corridor by conserving an anchor property on the ridge. This project also supports the goal of conserving land to protect the quality of the water flowing into the Connecticut River, in

addition contributing to the scenic beauty of this region, a goal outlined by the Connecticut River Joint Commission, a New Hampshire-Vermont governmental partnership.

BUDGET

16. Please provide a budget expenditure report. Also, provide a budget narrative that explains how the funds were utilized, what was purchased, what were the expenses items based upon the **original budget submitted and approved**. The **Awarded Amount** column from Gimbel should match the **Actual Line item expense column**. Use the form below and expand as needed:

Line Item	Line Item Explanation	Support From Your Agency	Support From Other Funders	Awarded Amount From Gimbel	Line Item Total of Project	Actual Line Item Expense
Land Acquisition	one parcel of land totaling 72 acres, \$63,500		\$38,500	\$25,000	\$63,500	\$25,000
Transaction Expenses	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 hrs./week @40/hr. 25 weeks (\$6,767)		\$11,697		\$11,697	
Fundraising Expenses	Mailings, grant proposals, private donor visits (36.5 hrs. @ \$50/hr.; *see third bullet in budget narrative)		\$1,825		\$1,825	
Overhead	17% direct costs excluding purchase price and stewardship funds (\$13,525 x 17%)		\$2,299		\$2,299	
Stewardship	Upfront costs (\$3,150) and Stewardship Endowment (legal defense @\$2,750; endowment @\$2,578; *see 5th bullet in budget narrative)		\$8,478		\$8,478	
TOTALS:			\$62,799	\$25,000	\$87,799	\$25,000

BUDGET NARRATIVE

- The Land Acquisition consisted of one parcel of land totaling 72 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 \$11,697. 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 landowner 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 $\$13,525 \times 17\% = \$2,299$.
- 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).

SUCCESS STORIES

17. Please tell us ONE success story.

The Forest Society reestablished its relationship with a landowner whose nearly 150-acre property abuts High Blue. 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 conservation project to rekindle that relationship.

OGDEN UT 84201-0029

In reply refer to: 4077550277
Jan. 02, 2015 LTR 4168C 0
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SOCIETY FOR THE PROTECTION OF NEW
HAMPSHIRE FORESTS
54 PORTSMOUTH ST
CONCORD NH 03301-5486



042906

Employer Identification Number: 02-0222237
Person to Contact: Ms Benjamin
Toll Free Telephone Number: 1-877-829-5500

Dear Taxpayer:

This is in response to your Nov. 14, 2014, request for information regarding your tax-exempt status.

Our records indicate that you were recognized as exempt under section 501(c)(3) of the Internal Revenue Code in a determination letter issued in May 1986.

Our records also indicate that you are not a private foundation within the meaning of section 509(a) of the Code because you are described in section(s) 509(a)(1) and 170(b)(1)(A)(vi).

Donors may deduct contributions to you as provided in section 170 of the Code. Bequests, legacies, devises, transfers, or gifts to you or for your use are deductible for Federal estate and gift tax purposes if they meet the applicable provisions of sections 2055, 2106, and 2522 of the Code.

Please refer to our website www.irs.gov/eo for information regarding filing requirements. Specifically, section 6033(j) of the Code provides that failure to file an annual information return for three consecutive years results in revocation of tax-exempt status as of the filing due date of the third return for organizations required to file. We will publish a list of organizations whose tax-exempt status was revoked under section 6033(j) of the Code on our website beginning in early 2011.