

Sierra Nevada Conservancy-Final Progress Report

**Sierra Nevada Conservancy Grant Program
Safe Drinking Water, Water Quality and Supply, Flood Control
River and Coastal Protection Act of 2008 (Proposition 84)**

Grantee Name: The Pacific Forest Trust

Project title: Jamison Ranch Project

SNC Reference Number: SNC 080131 **Submittal Date:** April 24, 2012

Report Preparer: Megan Wargo **Phone #:** 530-678-4418

Check one:

6-Month Progress Report
 Final Report

6-Month Progress Reports should reflect the previous six months. Final Reports should reflect the entire grant period.

A. Progress Report Summary: (Please provide a general description of work completed during this reporting period.)

During the grant period, PFT was able to nearly complete all of the due diligence required for the acquisition of a conservation easement on the Jamison Ranch. We executed the Option Agreement, finalized the Deed of Conservation Easement, received the completed appraisal report, and completed the fieldwork and a draft of the baseline documentation report and monitoring plan for the property. PFT also created a funding plan, including successfully securing funds from the National Fish and Wildlife Foundation, submitted grant requests to SNC and worked with Department of Fish & Game to request funding from the Wildlife Conservation Board.

B. Deliverables or Outcomes completed during this Reporting Period or Milestones Achieved: (Include specific information, such as public meetings held, agency participation, partnerships developed, or acres mapped, treated or restored.)

- Completed the Conservation Easement negotiations.
- Signed an Option to Purchase a Conservation Easement with Mr. Jamison.
- Received and approved appraisal on the property, appraising conservation easement at \$3,285,000.
- Completed Baseline Report field and office work and completed the accompanying draft Monitoring Plan.

- Identified and pursued funding for the conservation easement acquisition:
 - We submitted a grant application to the National Fish and Wildlife Foundation (NFWF) and were awarded \$1 million to put towards the easement purchase price.
 - We have applied for a Sierra Nevada Conservancy Competitive Grant requesting \$1 million of the cost of the easement purchase price, but unfortunately did not receive grant funding.
 - We secured a funding support letter from the Region 2 Department of Fish and Game (DFG) office for this project, but were unable to secure matching funding from the Wildlife Conservation Board.

C. Challenges or Opportunities Encountered: (Please describe what has worked and what hasn't; include any solutions you initiated to resolve problems. If your project is not on schedule, please explain why here.)

With the freezing of State bond funding for this grant, it did set back the timeline for our easement negotiations and signing of the Option Agreement. The landowner was willing to wait out the funding freeze with us, and once the funding was released we were able to complete the easement due diligence tasks on a normal schedule. Given the scarcity of project funding, we were unable to find matching funding for the NFWF grant, and have had to put the acquisition of this easement on hold.

D. Unanticipated Successes Achieved: (Please describe any additional successes beyond completing scheduled tasks or meeting scheduled milestones.)

During the course of working on this project, we saw real estate prices drop dramatically. So, our appraisal price came back at a lower value than the minimum purchase price set in the option (and informed by an earlier appraisal estimate.) We were successful in negotiating with the landowner to move forward with the sale at the lower appraised value. We were also pleased to have secured acquisition funding from a non-State source through the very competitive NFWF process.

E. Compare Actual Costs to Budgeted Costs: (Please refer to your grant agreement to list your deliverables/budget categories and budgeted costs compared to actual costs incurred during this reporting period in the table below.)

PROJECT BUDGET CATEGORIES	Budgeted SNC Dollars	Actual Dollars
Proj. planning, development & management	\$15,650.00	\$15,650.00
Easement negotiations and review	\$13,650.00	\$13,650.00
Appraisal Services	\$9,000.00	\$9,000.00
Baseline Report Development & monitoring plan	\$11,700.00	\$11,700.00

GRAND TOTAL	\$50,000.00	\$50,000.00
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Explanation: (if needed)

F. Do you have information to report on the project-specific Performance Measures for your project? (If so, please list the Performance Measures below and describe your progress.)

1. Number of People Reached.

Reporting:

We indicated we would create a chart to report the number of organizations, the names and the types of organizations we worked with on this project. We also said we would report the nature of our partnership with the organization on the project (e.g.- data sharing).

GROUP NAME	TYPE OF GROUP	PARTNERSHIP
1. Feather River Land Trust	Non-profit land trust	Data sharing
2. NRCS	Fed. Gov. agency	Data sharing, potential funder
3. Morgan Family Foundation	Foundation	Funding
4. Bella Vista Foundation	Foundation	Funding
5. S. Bechtel Jr. Foundation	Foundation	Funding
6. National Fish & Wildlife Foundation	Non-profit foundation	Funding
7. Sierra Business Council	Non-profit org.	Funding
8. Sierra County Planning Department	Local Gov. agency	Project support
9. Ducks Unlimited	Non-profit	Project support
10. Northern Sierra Partnership	Non-profit	Project support

Target:

We expected to work with three organizations on this phase of the project (Feather River Land Trust, the Nature Conservancy, and the Sierra Business Council). As is evident from the chart above, we have worked with additional organizations.

2. Resources Leveraged for the Sierra Nevada

Reporting:

We indicated we would provide SNC with a budget chart of the matching contributions including: funding sources, description of how the funds were used, and the amount of funding/in-kind donation. The chart below lists out the funding sources and amount

donated. Funds were used for a variety of different project-planning work, such as easement negotiations, site visits, and baseline development.

FUNDING SOURCE	AMOUNT DONATED
Bill Jamison, Landowner	\$5,000
Sierra Business Council	\$3,000
PFT	\$10,000
Morgan Family Foundation	\$3,000
Bella Vista Foundation	\$3,000
S. Bechtel Jr. Foundation	\$3,000

Target:

Our target was the following: “We expect to have \$21,500 in matching funds. (\$1,500 of in-kind donation from United Independent Title, \$5,000 donation from the landowner, and \$15,000 from the Sierra Business Council or an in-kind donation of project hours from PFT.)” As you can see from the chart above, we received approximately \$24,000 in matching contributions.

Additional Performance Measures

1. Percent of Pre-Project and Planning Efforts Resulting in Project Implementation

Reporting:

We indicated that one year after the SNC-funded pre-acquisition work has been completed, we would document the percentage of the appraised land that has been protected by a conservation easement. Although it has not been one year since pre-acquisition work has been completed, below is an update.

Target:

To have completed the acquisition of a conservation easement on the entire 2,400 acres of the Jamison Ranch.

Despite the fact that we were able to successfully negotiate the easement, agree upon a lower purchase price with the landowner, sign an Option, and secure \$1M in acquisition funding from the National Fish and Wildlife Foundation, the PFT has had to put this easement acquisition project on hold. Due to a lack of available matching funding, it does not look like we will be able to complete the acquisition in the foreseeable future.

G. Were there any other relevant materials produced under the terms of this Agreement that are not a part of the budgeted deliverables? If so, please attach copies. (Include digital photos, maps, media coverage of project, or other work products.)

There were no additional materials produced that were not part of the budgeted deliverables.

H. Next Steps: (Work anticipated in the next 6 months, including location and timing of any scheduled events related to the project.)

As noted above, due to the lack of matching funding for the acquisition of this conservation easement, we have had to put this project on-hold. We do not anticipate any additional work occurring over the next 6 months.

Please Complete this Section for FINAL Report ONLY

Capacity-Building Results and Collaboration and Cooperation with Stakeholders:
(What partnerships did you initiate or strengthen as a result of this project? How did they affect the project outcome? If applicable, how did this grant increase your organization's capacity? What is your plan to sustain this increase?)

Protection of the Sierra Valley's water and wildlife habitat resources has been a continuing priority for the US Fish and Wildlife Service, the CA Department of Fish and Game, the Northern Sierra Partnership, and other public and private partners. In 1998, the Pacific Forest Trust was contacted by the Sierra Business Council to provide a solution that would give permanence to the conservation work being done in the Sierra Valley. PFT stepped in and, working with the local community, completed the first conservation easement in the Valley. Since beginning work on its first Sierra Valley easement and continuing with the Jamison Ranch conservation easement, PFT has worked with local partners to structure our easements in the Sierra Valley to directly meet the goals of the Sierra County General Plan. We have also worked closely with the CA Department of Fish and Game to develop easement language that will effectively promote the improvement and protection of wildlife habitat on properties protected by conservation easements.

Protection of the Jamison Ranch has been a high conservation priority in the Sierra Valley for many years. We received numerous demonstrations of support for this project from various funding and project partners including: the Morgan Family Foundation, the Bella Vista Foundation, the S. Bechtel Jr. Foundation, Feather River Land Trust, Sierra County Planning Department, Sierra Business Council, Ducks Unlimited, the Northern Sierra Partnership and many others.

Leveraging public and private investments, and through partial landowner donations, PFT has acquired conservation easements on almost 3,000 acres of working forests and ranchlands in the southwestern Sierra Valley. Jamison Ranch is a continuation of these partnerships; it will provide permanent protection of the upland watercourses that feed downstream conservation and restoration projects, and add additional protection to the Sierra Valley's southwestern corridor. This project, and the SNC grant funds that have

enabled it, have helped PFT strengthen its relationships with landowners, funding agencies and partners.

The project has also strengthened PFT's understanding of the Valley, its communities, and how to best conserve ecological resources while allowing the ability of landowners to flexibly manage their rangelands. Indeed, by consulting with landowners, local land trusts, and resource professionals, PFT utilized this project as an avenue to revamp and tailor its conservation easement rangeland restrictions to better fit the goals of a rancher.

Description of Project Accomplishments:

1. Most Significant Accomplishment

Describe in one concise, well-written paragraph, the most significant accomplishment that resulted from this grant.

This grant provided PFT with the opportunity to produce a conservation easement that would have permanently protected the Jamison Ranch from future development and kept the land available for future generations to use as a working ranch. Its protection would have resulted in over 5,800 contiguous acres of protected working landscapes, wildlife habitat and further protection to the headwaters of the Middle Fork of the Feather River. As mentioned above, the easement acquisition has been put on hold at this time. Through this process we worked with NRCS to refine our easement restrictions on grazing land, and we will be able to use those new strategies on other working ranch easements going forward.

2. WOW Factor

If applicable, please describe anything that happened as a result of the project or during the project that is particularly impressive.

PFT was able to build stronger partnerships with such groups as Feather River Land Trust and California Rangeland Trust during the project planning process, which will continue to be helpful as we move forward on building community support for this project and future projects in the area.

3. Design and Implementation

When considering the design and implementation of this project, what lessons did you learn that might help other grantees implement similar work?

PFT learned several important lessons:

- 1) Do not lose momentum early in project development. Even if funding looks grim, if a project is a viable one likely to garner funding, it is important to have it ready when funding returns.

- 2) Consult with other groups who may be able to provide useful information for development of the easement language. By consulting and partnering, it will also build local support and understanding of the project.

4. Indirect Impact

Please describe any indirect benefits of the project such as information that has been developed as a result of the project is being used by several other organizations to improve decision-making, or a conservation easement funded by this grant that encouraged other landowners in the area to have conservation easements on their property.

PFT hopes that, like prior easements in the Sierra Valley, the strength and purpose of this easement, and our long-term stewardship of the property, will eventually lead to further conservation opportunities in the southern region of Sierra Valley. PFT has received calls from—and met with—three additional landowners interested in learning more about conservation easements. Their interest has grown from talking with the other landowners in Sierra Valley who have successfully worked with PFT.

5. Collaboration and Conflict Resolution

If you worked in collaboration or cooperation with other organizations or institutions, describe those arrangements and their importance to the project. Also, describe if you encountered conflict in the project and how you dealt with it, or if there was conflict avoided as a result of the project.

Because PFT's main focus is on working forest conservation easements, we collaborated with Feather River Land Trust, California Rangeland Trust, and the NRCS to develop strong conservation easement language specifically focusing on rangelands. This proved very beneficial to PFT, as it provided us with an opportunity to develop and enhance our rangeland conservation easement language, while at the same time improving our relationship with these other organizations.

PFT has developed strong relationships with many throughout the region, having secured its first conservation easement over ten years ago. Thus, the project has gained support from a variety of local stakeholders, as many people understand the value of seeing this property protected.

6. Capacity-Building

SNC is interested in both the capacity of your organization, as well as local and regional capacity. Please describe the overall health of your organization including areas in need of assistance. SNC is interested in the strength and involvement of your board, significant changes to your staff, size and involvement of membership. In addition, describe how your project improved capabilities of partners, or the larger community.

PFT has suffered through the recent economic crisis just like many other non-profit land trusts, experiencing reduced foundation support and less income from project-related work. However, PFT remains healthy. It has maintained and even added new funding partners. PFT has also been engaged in a lengthy organizational development initiative to increase organizational efficiency, improve staff well-being, and increase board involvement.

7. Challenges

Did the project face internal or external challenges? How were they addressed? Describe each challenge and any actions that you took to address it. Was there something that SNC did or could have done to assist you? Did you have to change any of your key objectives in response to conditions “on the ground”?

Again, the main challenge to the project was an external one – the freezing of state bond funding available for acquisition of conservation easements. Fortunately, this has not required PFT to alter its key objectives in the due diligence process, though it did require that PFT adjust its strategy and timeline. In response to funding delays, PFT extended and reduced the pace of its work to better match anticipated trends and reduce organizational risk. Further, PFT actively pursued non-state funding to help reduce the need for state funding and to increase the priority/ranking of the project to the state funders.

8. Photographs

Grantees are strongly encouraged to submit photos, slides or digital images whenever possible. These images will be used for SNC publications such as annual reports or on the website. Please make sure you clearly identify location, activity, and your project with each submitted image. Images will be credited to the submitting organization, unless specified otherwise.

See attached photographs.

9. Post Grant Plans

What are the post-grant plans for the project if it does not conclude with the grant? Include a description of the following (if applicable): (1) Changes in operations or scope; (2) Replication or use of findings; (3) Names of other organizations you expect to involve; (4) Plans to support the project financially, and; (5) Communication plans?

As mentioned earlier, we have had to put the acquisition of this easement on hold due to a lack of funding to match the NFWF grant. As we continue to work with forest and ranchland owners on new projects, we will be able to use the new easement

language we developed with other land trust partners and agencies in this project to help strengthen other future projects.

10. Post Grant Contact

Who can be contacted a few years from now to follow up on the project? Please provide name and contact information.

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Sierra Nevada Conservancy- Strategic Opportunity Grant Program



Taken from Wilson Lane, looking out West over the Jamison Ranch.

Jamison Ranch

The Pacific Forest Trust

Sierra Nevada Conservancy- Strategic Opportunity Grant Program



Taken from Wilson Lane, looking South over the property towards Highway 89 & 49

Jamison Ranch

The Pacific Forest Trust

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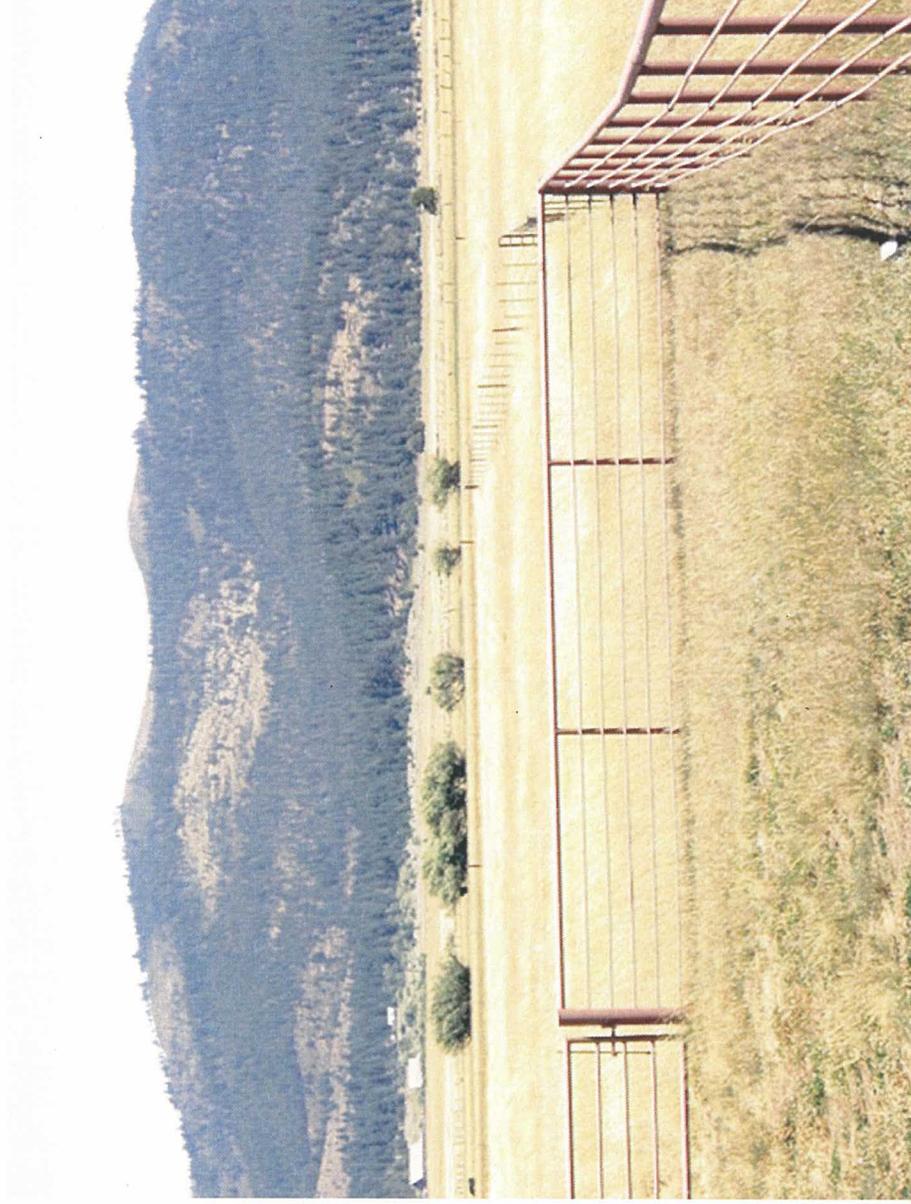


Standing in the Northeastern corner of the Ranch looking Southeast.

Jamison Ranch

The Pacific Forest Trust

Sierra Nevada Conservancy- Strategic Opportunity Grant Program



At the Southern End of the Ranch looking West towards the Lemon Canyon Ranch

Jamison Ranch

The Pacific Forest Trust