

AMERICAN LAND
CONSERVANCY

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October 25, 2012

Mandy Vance
Mt. Whitney Project Consultant
Sierra Nevada Conservancy
11521 Blocker Drive, Suite 205
Auburn, CA 95603

Re: Oakvale Ranch Final Report

Dear Mandy,

Enclosed please find American Land Conservancy's Final Report for the Oakvale Ranch Conservation Easement project in Mariposa County. Also enclosed please find a copy of the recorded Conservation Easement deed.

Thank you for your support of this tremendous project.

Sincerely,

Kerry O'Toole
President

Sierra Nevada Conservancy-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: American Land Conservancy
Project title: Oakvale Ranch Easement Acquisition
SNC Reference Number: SNC 080234 Submittal Date: 10/25/12
Report Preparer: Pat Ortmeyer Phone #: 406-241-2678

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, American Land Conservancy (ALC) acquired a conservation easement over the 3,941-acre Oakvale Ranch in Mariposa County, California. To achieve this goal ALC conducted negotiations with the landowner, raised funds, completed all due diligence, negotiated the terms of the easement and carried out the final easement purchase transaction, and negotiated and completed the transfer of the easement to the California Rangeland Trust (CRT). The easement conserves oak woodland and oak savannah habitat that supports many species, including several species of concern. Additionally, over 10,000 linear feet of streambed were protected by the conservation easement.

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.)

Outcomes and Deliverables:

Outcomes from work carried out during the grant period include conservation of 3,941 acres of oak woodlands and important wildlife habitat in Mariposa County in the Yosemite foothills in an area classified by the County as being at highest risk of development (due to its proximity to roads leading to Yosemite National Park).

The land conserved by this project includes historically significant sites, including several miles of stone wall constructed by Chinese laborers in the mid-19th century, and more

than 10,000 linear feet of streambed. The easement conserves habitat for deer, wild pigs, dove, quail, geese, raptors, and rodents, and requires grazing management practices conducive to maintaining healthy oak woodlands. Further, the conservation easement prevents further subdivision of the property, prevents the development of commercial mining, logging, and feedlots, and restricts 90% of the property from the development of intensive agricultural practices.

In combination, these outcomes help the county of Mariposa meet the land use goals of its 2006 General Plan by conserving agricultural land, thus encouraging stewardship of a working landscape, nurturing the county's agricultural economy, and maintaining the rural character of Mariposa County. It also requires that the landowners follow the otherwise voluntary guidelines of the county's oak woodland management plan. (This plan includes encourages property owners to retain oak trees of all sizes and species, maintain clumps of undisturbed vegetation, and avoid the use of heavy equipment in tree root zones and dripline. The plan also gives recommendations on preserving oak canopy cover and regenerating grazing lands.)

Deliverables that led to these outcomes include completion of the appraisal (funded with an earlier grant to ALC from the Sierra Nevada Conservancy), completion of the Phase I Environmental Assessment, negotiation of the terms of the easement with the landowner, legal review, fundraising (the \$1,000,000 grant award from Sierra Nevada Conservancy was matched with a \$1,095,000 cooperative agreement award from the U.S. Natural Resources Conservation Service Grassland Reserve Program), completion and closing of the easement acquisition, and negotiations and transfer of the easement to CRT.

Partnerships:

To complete this project ALC worked closely with the California Rangeland Trust (who will hold and monitor the easement), and with the USDA Natural Resources Conservation Service (NRCS), who provided a cooperative agreement of \$1,095,000 to complete the easement and also worked with the landowner to complete the range management plan for the ranch. No other new partnerships were developed, and no public meetings were held as part of this project.

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.)

The project proceeded generally as expected, though some delays were encountered, including a delay in getting the appraisal approved by the state, delays with funding agency reviews, and some delays in finalizing the transfer of the easement to CRT. Ultimately none of these delays prevented the successful completion of the project.

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

The project was completed successfully with no significant additional success to report.

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
SNC portion of easement acquisition	\$1,000,000	\$1,000,000
GRAND TOTAL	\$1,000,000	\$1,000,000

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.)

Applicable Performance Measures (from grant application):

6.2. Dollar Value of Resources Leveraged for the Sierra Nevada: The grant award from the Sierra Nevada Conservancy was \$1,000,000. ALC successfully leveraged an additional \$1,135,000 in funds for this project (\$1,095,000 for the easement and another \$41,000 in transactional and staff costs), for a leverage ratio of 1.14 to 1.

6.4. Number of New, Improved, or Preserved Economic Activities: This project helps preserve current economic activities on the ranch, which consist of a cattle operation.

6.6. Linear Feet of Stream Bank Protected or Restored: This project protected 10,000 linear feet of seasonal streambed, which equates to 20,000 linear feet of streambank.

6.8. Number of Special Significance Sites Protected or Preserved: This project protected a 150-year old family cemetery on the ranch on which four generations of the landowners' family are interred. The project also protected an unknown number of miles of stone wall constructed by Chinese laborers during the mid-19th Century.

6.10. Acres of Land Conserved: The project conserved 3,941 acres of open space and working ranchland, sixty percent of which consists of oak woodlands that are of high conservation priority in Mariposa County.

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.)

N/A

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

The project is now complete and no work is anticipated in the next six 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?)

American Land Conservancy partnered with California Rangeland Trust to complete this transaction. These two organizations have partnered together on multiple transactions through the years. Each project, including this one, poses new and unique challenges and opportunities for collaboration. The grant itself was not used to increase organizational capacity for American Land Conservancy, given that the funds were for acquisition of the conservation easement. Nevertheless, each land transaction that closes is a new experience which can be built upon for future success.

Description of Project Accomplishments:

1. Most Significant Accomplishment

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

The most significant accomplishment achieved as a result of this grant was the permanent protection of nearly 4,000 acres of oak woodlands and open space, 20,000 linear feet of stream bank, and historical agricultural lands in the Yosemite foothills in Mariposa County, California. The project conserves some 2,550 acres of oak woodland and oak savannah, cultural resources, important wildlife habitat and plant communities, and a ranch that has been operated by the same family for more than 150 years. The project maintains an important linkage between the Central Valley to the east and Yosemite National Park, permanently protecting nearly 4,000 acres in an area facing extreme development threats.

2. WOW Factor

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

While the protect was not necessarily unique as a conservation effort, it is always noteworthy to successfully carry out a complex land transaction (this was took four years to complete) that results in the permanent protection of irreplaceable natural, cultural, and agricultural resources.

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?

As each land transaction is unique, it would be hard to apply lessons learned on this project to other conservation efforts. Each is complex in its own way and must be approached with creativity and flexibility.

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.

It is the hope of ALC that since the successful completion of this project other landowners in the region will be inspired to pursue land protection efforts on their own properties.

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.

ALC has worked in partnership with CRT many times over the years, with each organization bringing unique expertise, strengths, and experience to the table. The partnership between ALC and CRT is strong and remains so as a result of this project. This is true also because both organizations are committed to open, honest, and clear communication.

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.

During the course of the grant, several compelling factors triggered the need for ALC to pursue an organizational strategic planning process in 2011 (funded by a grant from the David and Lucile Packard Foundation). Among the factors triggering this decision were significant changes in the conservation landscape; a need for ALC to reexamine its business model; and a need for ALC to update its 2005 strategic plan.

During this strategic planning process ALC staff and board examined a range of strategies to address current conservation realities vis a vis ALC's core strengths and resources. As a result of this thorough deliberation, ALC's board voted to scale back operations in 2012, following a deliberate and carefully planned phase-out process. This process is now underway, and includes cessation of activities in the Central Valley region. It is ALC's hope that its recent and past collaboration with its regional partners in the area (such as CRT) has deepened their expertise and strengthened their capacity to meet the future conservation needs of this region.

Challenges

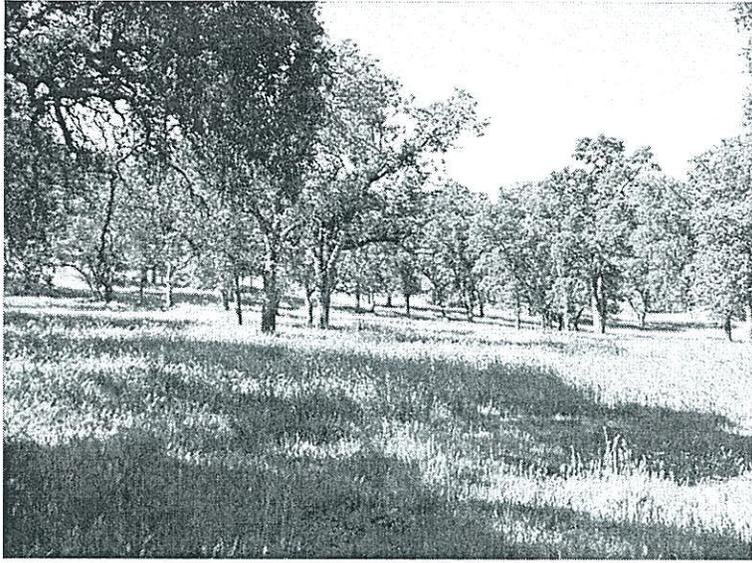
Did the project face internal or external challenges? How were they addressed? Describe each challenge and any actions that you took to address it. Was there something that SNC did or could have done to assist you? Did you have to change any of your key objectives in response to conditions "on the ground"?

The biggest challenge in this project was timing and the complicated nature of the transaction. The project took over four years to complete due to a variety of factors. In the end, both funding agencies (SNC and NRCS) mobilized, and the transaction was completed successfully.

7. 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.

Photos of Oakvale Ranch Conservation Easement Project Mariposa County, California





8. 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?

The project was completed with the conclusion of the grant and no post-grant work is planned.

9. Post Grant Contact

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

- **Kerry O'Toole**, American Land Conservancy, 415-912-3660
- **Marshall Cook**, California Rangeland Trust, 916-444-2096

SNC-approved Performance Measures: (Please list each Performance Measure for your Project, as identified in your Grant Agreement, and the results/outcomes.)

Please see Question F, above.