

Sonoran Institute

ANNUAL REPORT 2004



SONORAN
INSTITUTE

healthy landscapes • vibrant economies • livable communities



*Healthy Landscapes
Vibrant Economies
Livable Communities*

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Monica DurandMarketing Director

Moving on

We thank and wish the best of success to Pat Evans and
Suzanne Bott who have left the Sonoran Institute to pursue
other work.

Welcome

Welcome to Carlos Valdés Casillas, Patti Corcoran,
Carla Carpentier, Jennifer Barefoot, Mark Haggerty, Jason
Meininger, and Diana Rhoades.

Dear Friends

From the establishment of the Sonoran Institute in 1990, we have continually worked to increase our impact and presence in the West. The opportunity for us to now emerge as a pre-eminent force in the conservation movement has never been greater. At both the state and federal levels, and in both the U.S. and Mexico, there is an increased receptivity to our mission and collaborative approach to conservation.

To celebrate our 15th anniversary, this report chronicles the people and accomplishments that have made the Sonoran Institute what it is today.

In 2004 we focused our efforts to exert a **deeper impact** on state and federal conservation, land use, and economic policy; to develop a **higher public profile** throughout Western North America; and to establish a **broader presence and leadership role** in the states and

localities of Western North America (including gateway communities, metropolitan areas, and communities located in ecologically important landscapes).

I'm delighted to report on our successes in these areas. 2004 was a banner year for the Sonoran Institute:

- Two victorious open space bond initiatives (one in Gallatin County, Montana and one in Pima County, Arizona);
- The significant expansion of two national parks (Tumacácori and Petrified Forest, both in Arizona);
- The creation of Salmon Valley Stewardship in Lemhi County Idaho; and
- National awareness of the Sonoran Institute and the role of protected lands through the socioeconomic report, *Prosperity in the 21st Century West*.

In short our opportunity and challenge is to become the preeminent conservation organization in Western North America. The window is open now for us to do so, but the opportunity is fleeting. We continue toward our vision of **healthy landscapes, vibrant economies, and livable communities** across the West.



Luther Propst
Executive Director



S O N O R A N I N S T I T U T E T I M E L I N E



Chris Monson,
Rocking K Development

1990

- ▶ The Rincon Institute is established as a condition of county approval for a master planned community, Rocking K, southeast of Tucson, Arizona. The Rincon Institute is dedicated to protecting the natural resources of Saguaro National Monument and neighboring Rincon Valley.
- ▶ Luther Propst, working for World Wildlife Fund, negotiates establishment and oversees start-up of Rincon Institute, while laying the foundation for collaborative conservation West-wide with incorporation of the Sonoran Institute.

1991

- ▶ Luther Propst leaves his position in Washington DC with World Wildlife Fund and moves to Tucson to become the first executive director of both the Sonoran and Rincon Institutes. Sonoran assumes management of World Wildlife Fund's Innovation Grants Program, providing \$900,000 in catalytic grants to collaborative local conservation efforts over a four-year period.
- ▶ The Sonoran and Rincon Institutes lead the effort to expand the Rincon Mountain district of Saguaro National Monument.

1992

- ▶ The Sonoran Institute initiates a Borderlands Program (now the Sonoran Desert Program) to facilitate collaborative cross-border conservation in the Sonoran Desert of Arizona and Sonora. First of three "town hall" meetings held in the western Sonoran Desert to promote cross-border conservation among local residents and public land managers.
- ▶ Red Lodge, Montana hosts a local Successful Communities workshop led by Luther Propst. This is the most successful of six local Successful Communities workshops held throughout the Greater Yellowstone region over the next several years. Success of these workshops leads to the Sonoran Institute being invited to lead numerous local visioning and conservation planning processes in Arizona, California, Colorado, Idaho, Montana, Utah, Washington, and Wyoming.

Donations

Gifts from 1/1/04 to 12/31/04

Gifts to \$100

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& Jennifer Lowe
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Gifts \$100 to \$249

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& Carol Guzman Aspevig
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Virginia Zaccheo

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Peggy Dulany
Karan English & Rob Elliott
The Fanwood Foundation
Andy Gordon
The Windibrow Foundation
Steven C. Leuthold
Family Foundation
Gretchen Long

The Westport Fund
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Dwight & Minnie Minton
Bryan & Axson Morgan
Luther Propst
Jane Ragle & John Smith
Nan Stockholm Walden
& Dick Walden
Elizabeth Storer
Art & Suzi Thompson

Gifts \$5000 to \$9999

Erik & Katherine Borgen

Gifts \$10000 to \$19999

Clark Family Foundation
Ishiyama Foundation
L.P. Brown Foundation
Liz Claiborne
& Art Ortenberg
Foundation

Gifts \$20000 to \$39999

Anonymous

Gifts \$40000 and above

Louise Benz Plank

Gifts in Honor of:

Amory Blake
Kate Broadman
Jake Kittle
Nancy Laney
Erin McIntire
Tim Westby & Leslie Watson

Gifts in Memory of:

Ginny Gregg
Smokey Jack
Ellen Meloy
Dr. Derrick Thompson

Donations

Foundation & Grant Support

Argosy Foundation
 Arizona Community Foundation
 The Brainerd Foundation
 The Bullitt Foundation
 Camp-Younts Foundation
 Charlotte Martin Foundation
 The Christensen Fund
 Compton Foundation
 David Rockefeller Fund
 Desert Foothills Land Trust
 The Doris Duke Charitable Foundation
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 The J.M. Kaplan Fund
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 John D. & Catherine T. MacArthur Foundation

Henry P. Kendall Foundation
 La Salle Adams Fund
 Lincoln Institute of Land Policy
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 Summit Foundation
 Thaw Charitable Trust
 Tides Foundation
 Turner Foundation, Inc.

V. Kann Rasmussen Foundation
 Walton Family Foundation
 Wilburforce Foundation
 The William and Flora Hewlett Foundation
 The Wyss Foundation

Government and Non-Profit Organization Support

Arizona Sonora Desert Museum
 City of Tucson
 Colorado Conservation Trust
 The Conservation Fund
 Environmental Defense
 Grand Canyon Trust
 Las Virgenes Institute
 McDowell Sonoran Conservancy
 National Association of Counties
 The Nature Conservancy
 North American Fund for

Environmental Cooperation
 Pronatura Sonora
 Santa Lucia Conservancy
 Sheridan County, Wyoming
 Sublette County, Wyoming
 Superstition Area Land Trust
 Tohono O'Odham Nation
 Transition Zone Horticultural Institute
 U.S. Air Force Legacy Fund
 U.S. Army Yuma Proving Ground
 U.S. Bureau of Land Management
 U.S. Fish & Wildlife Service
 U.S. National Park Service

Corporate & Organizational Support

Bil Taylor Associates Inc.
 Community By Design
 Community Food Co-op
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Curtis Lueck & Associates
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 Jonathan L. Foote and Associates
 Land EKG Inc.
 Lazy K Bar Guest Ranch
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 MJM Consulting
 Rick Bright Architect, AIA Inc.
 Taylor Design and Build
 The Temp Connection
 Tofel Construction

S O N O R A N I N S T I T U T E T I M E L I N E

1993

- ▶ “Town hall” meetings led to the creation of the International Sonoran Desert Alliance in Ajo, Arizona. ISDA’s mission is to protect the unique biological and cultural diversity of the Sonoran Desert through international dialogue, education, sustainable development, and community action. ISDA was instrumental in creating new biosphere reserves in Sonora, Mexico.
- ▶ Beartooth Front Community Forum established in Red Lodge, Montana to implement land use, conservation, and downtown revitalization priorities identified at Successful Community workshop.



Lorraine Eiler,
 International
 Sonoran Desert
 Alliance

1994

- ▶ The Sonoran and Rincon Institutes help secure designation of Saguaro National Monument as a national park and the addition of 7,500-acres to the Tucson Mountain district.
- ▶ With the Sonoran Institute’s assistance, landowners protect more than 10,000 acres of ranch lands around Red Lodge, Montana and lead a successful effort to prevent relocation of the post office from the downtown, securing a major victory for local efforts to combat sprawl.

- ▶ The San Rafael Valley Association invites the Sonoran Institute to assist in developing a plan to protect the San Rafael Valley and the headwaters of the Santa Cruz River on the border with Mexico in southern Arizona. This effort results in establishment of the San Rafael Valley Land Trust and a plan that protects the vast majority of the private land in the valley from subdivision through conservation easements. The land trust later expands to become the Southeast Arizona Land Trust.



Stuart Leidner, Executive Director,
 Southeast Arizona Land Trust

“With the guidance and assistance from the Sonoran Institute what is known today as the Southeast Arizona Land Trust was created to provide landowners options to deal with the continued growth and changing land uses in southeastern Arizona. We wish to thank the Sonoran Institute for their support and we look forward to sharing our successes with you in the coming years.”

Donor Profile

BOB & HOPE STEVENS

Meet two leaders in the conservation movement—Bob and Hope Stevens of Helena, Montana.

More years ago than Hope cares to count, she and Bob packed up from their farm in Virginia and struck out like gypsies for Montana and the great open spaces. There they settled for good. Over the last decades,



Hope & Bob Stevens

Bob and Hope have turned their 1,200-acre Montana farm into a natural wildlife refuge. Additionally, the Stevens' home is a testament to sustainable living. With extensive gardens, composting, and passive solar design to complement the 2,000 watts of solar and wind-based power generation, Bob's vision for the future includes a hydrogen-based economy that could ultimately liberate us from our dependence on fossil fuels.

Bob and Hope's commitment to conservation includes a philanthropic approach as well. Through their Fanwood Foundation West, the Stevens support more than 100 conservation organizations around the world. Their financial support of the Sonoran Institute goes back as far as 1996 when they recognized that "Sonoran's collaborative approach to conservation was so unique and so effective."

Bob and Hope have been tireless in their mission to leave this a better world through conservation and sustainable development. Says Hope, "We have made wonderful friends through all our contacts with the organizations—firm and fast friends we treasure." Both the landscapes of the West and we as individuals treasure their spirits!

S O N O R A N I N S T I T U T E T I M E L I N E

1995

- ▶ The Sonoran Institute establishes the Corporation for the Northern Rockies to assist communities, landowners, and enterprises promote sustainable economies.

1996

- ▶ The Sonoran Institute strengthens its relationships with conservation-minded ranchers and publishes *Preserving Working Ranches in the West*.



Susan Heyneman – Bench Ranch, Montana, Sonoran Institute Board Member and her granddaughter, Aria Jack Heyneman

1997

- ▶ The Sonoran Institute and The Conservation Fund produce *Balancing Nature and Commerce in Gateway Communities*, published by Island Press. This begins the Gateway Communities program for public land managers and neighboring communities.
- ▶ A significant open space bond measure passes in Pima County, Arizona through the collaboration of the Sonoran Institute and other conservation groups.
- ▶ With help from the Henry P. Kendall Foundation, the Sonoran Institute opens an office in Bozeman, Montana to provide resources and assistance to the rapidly-growing communities around Yellowstone National Park.

1998

The Working Landscapes Program is created to help preserve working, family-owned ranches and the wildlife habitat of these lands throughout the West.



Ted Smith, Henry P. Kendall Foundation

Corporate Profile

MADDEN PUBLISHING



John Hudak and Kevin Madden

Twenty-three years ago Montana native Kevin Madden and his wife Jill graduated from the University of Arizona and began a small publishing company in Tucson. Their flagship publication was Tucson Guide, and they believed that by showcasing the amazing array of activities and events in southern Arizona, they could make a living. Today, Madden Publishing features 14 publications in Arizona and produces travel and tourism magazines in 27 states. And the presses are just beginning to roll.

Madden Publishing created Tucson Home Magazine, a quarterly

publication that covers everything from kitchen trends to gardener's timetables. Tucson Home's Editor-in-Chief, John Hudak, took interest in the Sonoran Institute's 2004 Building from the Best of Tucson Awards, and liked what he saw.

"The natural environment inspires people," John said. "We are in complete agreement with the Sonoran Institute that the built environment should be worthy of the natural environment that surrounds it, and we want to help the Institute promote the principles of the 'Building from the Best' concept."

Tucson Home Magazine became a major sponsor of the Building from the Best of Tucson Awards and the 2005 Sonoran Institute Celebrates Faces of Conservation Awards; advertising the events in the magazine, contributing silent auction items, and including an eight page feature on the award winners.

There are many ways that Madden Publishing and the Sonoran Institute dovetail together.

"Travel and tourism are important economic drivers in the West," Kevin said. "But it's also more

than that. People are looking for authenticity, uniqueness, and natural beauty. Places like Red Lodge, Montana that are managing their assets well, including historic preservation and wilderness, have continued with a strong economy. It can be done, if it's done in the right way."

"That's what we like about the Sonoran Institute," John added. "Their approach defines the best of what communities have to offer."

S O N O R A N I N S T I T U T E T I M E L I N E

1999

- ▶ In partnership with the National Association of Counties, the Sonoran Institute launches the Western Communities Stewardship Forum to help rural western counties effectively manage growth. Custer, Colorado; Jefferson, Montana; and Rio Arriba, New Mexico are among seven counties attending the first growth management training workshop.
- ▶ The Sonoran Institute, The Conservation Fund, and the National Park Service host first training workshop on building gateway partnerships.
- ▶ The Community Stewardship Fund is established with support from the David and Lucile Packard Foundation, providing more than \$230,000 in small grants to local collaborative conservation efforts in the West over a three-year period.



Abby Freidman and Paul Beddoe, National Association of Counties

"With the Economic Profile System (EPS), counties and communities can quickly determine the economic portrait of their area and the impact of BLM goods and services on the community. This information often moves discussions from passionate beliefs and opinions to a dialogue about how the decisions and alternatives affect the local economy and social framework. EPS is clearly the tool we needed to change perceptions and engage in dialogues, and it is now a major step in our early planning process."

Ann Aldrich
Associate State Director, BLM Eastern States

2000

- ▶ The Sonoran Institute leads efforts that establish Las Cienegas National Conservation Area, protecting 142,000 acres of public, state trust, and private lands in the Cienega Creek watershed in Southern Arizona.
- ▶ The Ecological Association of Resource Users of the Rio Hardy and Colorado (AeuRHyc) is established to promote local river restoration efforts and sustainable economic opportunities around the Colorado River Delta in the U.S. and Mexico.
- ▶ The Sonoran Institute is instrumental in organizing voter approval of a \$10 million open space bond in Gallatin County, Montana, the first successful open space bond in the state.
- ▶ The Sonoran Institute unveils the Economic Profile System, in partnership with the U.S. Bureau of Land Management, which provides county-level socioeconomic information free of charge via the World Wide Web.



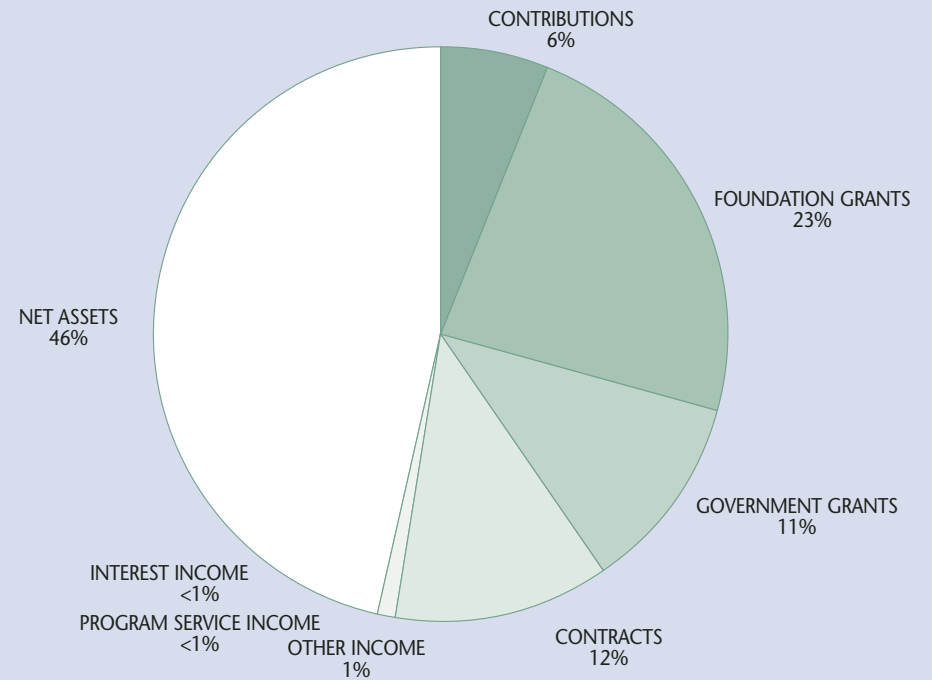
Finances *

FY 2004 REVENUES & RESOURCES

	Amount	% of total
Contributions	\$321,585	6%
Foundation grants	\$1,164,193	23%
Government grants	\$586,647	11%
Contracts	\$597,050	12%
Interest income	\$7,429	<1%
Program service income	\$9,260	<1%
Other income	\$47,826	1%
Net assets	\$2,370,694	46% **
TOTAL	\$5,104,684	100%

* From fiscal year 2004 audited financial statement

** Net assets are funds carried forward from prior years



S O N O R A N I N S T I T U T E T I M E L I N E

2001

- ▶ *Building from the Best of Tucson* is published, identifying best development practices and profiling local development projects that reflect “best practices” in desert design principles.
- ▶ The Columbia River Greenway Alliance is established in Invermere, British Columbia, Canada to promote community-based conservation in the Upper Columbia River Basin.

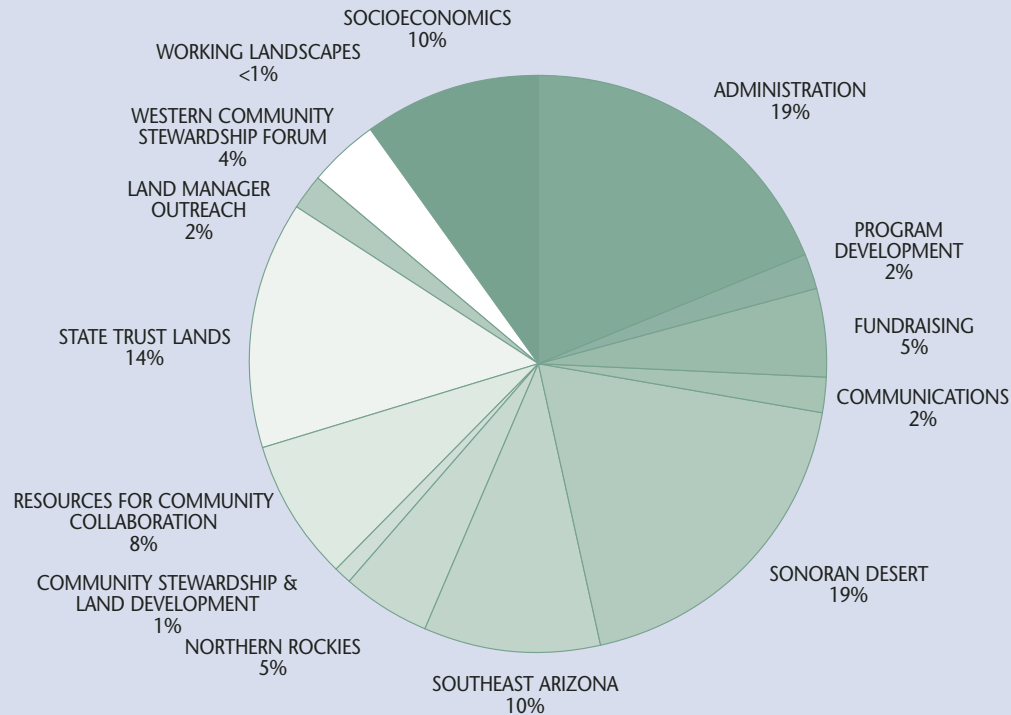


2002

- ▶ The SocioEconomics Program is established to research and provide training and assistance on economic and demographic trends influencing growth and development in the West.
- ▶ The Sonoran Institute assumes management of Resources for Community Collaboration, which provides small grants and technical assistance to collaborative conservation groups in Western North America. Resources for Community Collaboration has awarded a total of \$700,000 in small grants to 13 Western states, Sonora, Mexico and British Columbia, Canada.
- ▶ Local experts and scientists from the U.S. and Mexico reach consensus on conservation and restoration priorities for the Colorado River Delta.



Juan Butron,
Colorado River Delta



FY 2004 EXPENSES

	Amount	% of total
Sonoran Desert	\$622,190	19%
Southeast Arizona	\$341,004	10%
Northern Rockies	\$181,881	5%
Community Stewardship & Land Development	\$34,910	1%
Resources for Community Collaboration	\$261,654	8%
State Trust Lands	\$466,492	14%
Land Manager Outreach	\$50,994	2%
Working Landscapes	\$5,522	<1%
Western Community Stewardship Forum	\$120,188	4%
SocioEconomics	\$321,813	10%
Administration	\$622,542	19%
Program Development	\$67,117	2%
Fundraising	\$182,344	5%
Communications	\$80,577	2%
TOTAL	\$3,359,228	100%

S O N O R A N I N S T I T U T E T I M E L I N E

2003

- ▶ As a part of the Building from the Best of Tucson program, the Tucson Community Design Academy graduates 28 design ambassadors to constructively engage in local planning and design efforts.
- ▶ The Institute's office in Canmore, Alberta incorporates in Canada as the Chinook Institute for Community Stewardship and becomes a sister organization promoting the Sonoran Institute's mission and approach in Western Canada.
- ▶ With the Sonoran Institute's assistance, Gallatin County, Montana approves a zoning district for the Hebgen Lake basin that protects over 2,300 acres of critical wildlife habitat for bison, elk, and bears migrating out of Yellowstone National Park.

- ▶ Following participation in the Institute's Western Community Stewardship Forum and with assistance from the Institute, Sublette County, Wyoming establishes first county-wide purchase of development rights program in Wyoming and provides \$500,000 in seed funding.
- ▶ The Rincon Institute and five other community stewardship organizations create the Community Stewardship Organization Network to promote the integration of long-term funded conservation programs in new development.
- ▶ *The Planning for Results Guidebook* is published in partnership with the National Association of Counties as a resource for successful community planning.

- ▶ The Sonoran Institute and Lincoln Institute of Land Policy establish a joint venture to improve management of state trust lands in the West. Sonoran Institute opens an office in Phoenix, Arizona to accomplish that goal.



Katie Lincoln,
Lincoln Institute of Land Policy

"We are pleased to be in partnership with the Sonoran Institute as we work toward the comprehensive reform of state trust lands—not only in Arizona, but West-wide. The Sonoran Institute shares the desire with us to bring all stakeholders to the table to reach a consensus vision."

Katie Lincoln, Chair,
Lincoln Institute of Land Policy

2004

- ▶ Sonoran Institute publishes *Prosperity in the 21st Century West: The Role of Protected Public Lands* to highlight the West's new economic drivers and dispel old myths. This report is reshaping the way many people think about the economy of the West, and finds that in today's global economy, our ace in the hole, is our protected public lands. The report demonstrates that congressionally-designated wilderness areas, national parks, national monuments, and other protected public lands attract people and businesses.



Wilderness, national parks and monuments, and other protected public lands set aside for their wild land characteristics can and do play an important role in stimulating economic growth. An educated workforce, newcomers, airports, and a number of other factors allow some areas to flourish and to take advantage of protected lands as part of an economic development strategy.



- ▶ Congress expands Tumacácori National Historical Park in southern Arizona to protect a one mile reach of the Santa Cruz River and the cultural history associated with the mission.

"The addition of these lands would allow the National Park Service to further enhance the visitor experience at Tumacácori. The 19th century orchard and farmlands could be replanted, and a living history program will help visitors understand the entire mission community. The Santa Cruz riparian area would allow us to expand our education programs to include learning about the historical and modern day ties to this critical desert resource.

Ann M. Rasor, Superintendent,
Tumacácori National Historical Park

Accomplishments

- ▶ As a result of The Sonoran Institute's involvement in Lemhi County, Salmon Valley Stewardship is established to promote sustainable use of natural resources and enhance and diversify economic opportunities.
- ▶ The Sonoran Institute works with partner groups on two successful open space bonds: one in Gallatin County, Montana for \$10 million, and the other in Pima County, Arizona for \$174 million.

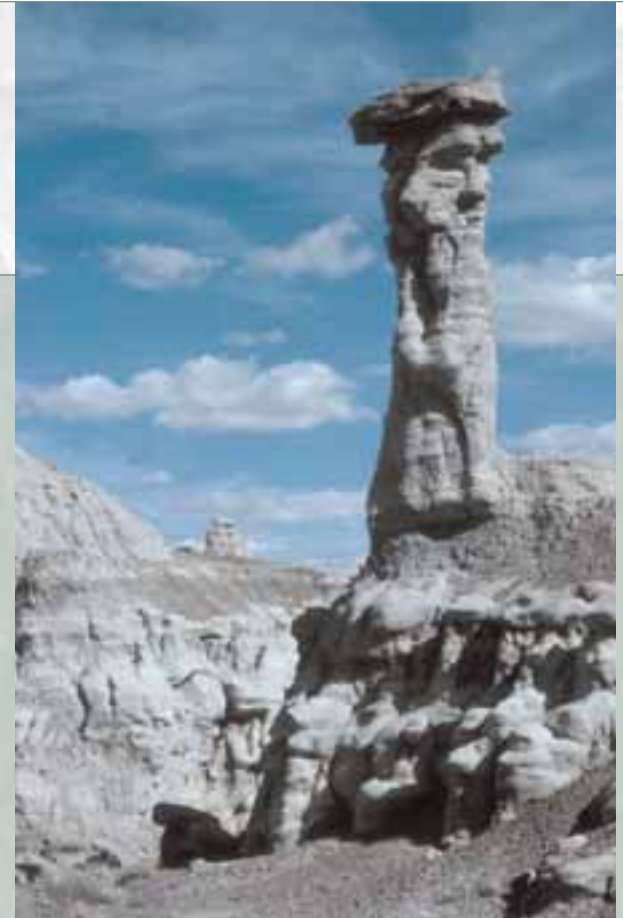


- ▶ The Sonoran Institute played a critical role in coordinating and elevating the voice of public support behind the effort to double the size of Petrified Forest National Park. The park expansion protects over 120,000 acres of highly scenic and scientifically important lands adjoining the park in northeastern Arizona outside of Winslow and Holbrook, Arizona.

Working closely with our partner, the National Parks Conservation Association (NPCA), the Institute backed a bill introduced by Senator John McCain and Congressman Rick Renzi that expanded the boundaries of the park in order to protect a large portion of the Chinle escarpment, which holds the world's best fossil record of late-Triassic (250 million years b.p.) terrestrial ecosystems. The park expansion also protects the park's stunning Painted Desert vistas and significant archaeological sites including extensive pueblo ruins and some of the most unusual rock art galleries in the Southwest.



A conservation easement of 956 acres on this property owned by Joe Skinner was purchased with money from the first Gallatin County open space bond.



The expansion of Petrified Forest National Park protects important fossil-bearing formations and scenic vistas within the Painted Desert.

The expansion at Petrified Forest National Park is important to the economy of northeastern Arizona, particularly given the important role that tourism to the park, with its 575,650 annual visitors, represents to local communities.

Mission

The Sonoran Institute works with communities to conserve and restore important natural landscapes in Western North America, including the wildlife and cultural values of these lands.

The Sonoran Institute's community stewardship work creates lasting benefits including healthy landscapes, vibrant economies, and livable communities that embrace conservation as an integral element of their economies and quality of life.

Vision Statement

Through community stewardship, the Sonoran Institute contributes to a day when:

- Healthy landscapes, including native plants and wildlife, diverse habitats, open spaces, clean air and water, extend from northern Mexico to Western Canada.
- People embrace stewardship as a fundamental value by caring for their communities, economies, and natural landscapes.
- Resilient economies support strong communities, diverse opportunities for residents, productive working landscapes, and stewardship of the natural world.
- This vision will be achieved through civil dialogue, broad-based partnerships, and cross-boundary cooperation.



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