



SONORAN INSTITUTE *impact*  
2009 Annual Report



*Shaping the Future of the West*

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# From the Executive Director

## Friends,

The “winds of change” certainly blew hard in 2009, beginning with the gale that shook the nation’s economy and many individuals’ finances to the core, and followed by the gusts that ushered in new ideals and political leadership in Washington and around the West.

The enormous transitions of 2009 have made everyone focus on what’s most important – in our work and in our lives. At the Sonoran Institute, these changes have reinforced a sense of purpose among my colleagues and I for our work:

- ✓ Conservation and smart growth must be grounded in sound economic and fiscal analysis.
- ✓ Collaboration and respect for local values are vital to the effective long-term stewardship of our land and water.
- ✓ Development planning at the state, county and local levels must fundamentally change to avoid the sprawling and inefficient development patterns and waste of energy that has characterized our behavior in recent years.

In terms of the “big picture,” the Obama administration has selected several excellent individuals to lead key federal agencies, signaling new priorities for public land management, transportation, environmental protection and energy. These changes in Washington provide the foundation for long-term policy change in communities throughout the West.

Because winds always shift, however, policy and leadership changes at the federal level must be matched with commitment and action at the state and local levels. At the Institute, we know that building trusting and supportive relationships with community leaders, and helping local citizens arrive at their own solutions for saving and enhancing places they love, are essential to creating change in the West that lives—and lasts.

This annual “impact” report highlights examples of this dynamic in action in 2009, as we worked together with local people to preserve wildlife corridors and habitat in California’s Morongo Basin, restore and maintain the health of the Santa Cruz River flowing through Mexico and Arizona, and promote smart growth principles in communities in Arizona, Montana, Wyoming and Colorado.

From Mexico to Montana, I have seen the Institute’s commitment to engage communities on the ground—the basis for our work—bring about more than conservation; it also creates vibrant, prosperous communities where people want to live and enjoy the West.

Thank you for your continued financial support which helps us inspire local leaders and citizens into action in a way that achieves results and makes us all proud, regardless which way the winds are blowing.



Luther Propst  
Executive Director

“At the Institute, we know that building trusting and supportive relationships with community leaders is essential to creating change in the West that lives —and lasts.”



## 2009 ROUNDUP OF WESTERN DISPATCHES

***“A Living River”—Charting the Health of Arizona’s Upper Santa Cruz River*** (December/Arizona)

***Room to Roam—Engaging Communities to Act to Protect Wildlife*** (November/California)

***The Wisdom of Smart Growth*** (October/Montana)

***Putting the “People of the River” on the Map*** (September/Arizona & Mexico)

***Greening Arizona—A Call for Inspired Leadership*** (August/Arizona)

***Urban Growth is Threatening Prized Western Lands*** (July/Westwide)

***Centennial State Rallies around Smart Growth*** (June/Colorado)

***Leadership Redefined: Montana Embraces Smart Growth*** (May/Montana)

***A Partnership that is Shaping the Future of the West*** (April/Westwide)

***Wyoming Applies Horse Sense to Land Laws*** (March/Wyoming)

***Fine Growth Plans, Like Fine Wines, Require Patience*** (February/Montana & Idaho)

***Many Happy Returns for Montana Lands*** (January/Montana)

Read all of our Western Dispatches online at:  
[sonoraninstitute.org](http://sonoraninstitute.org).



# Charting the Health of a River

Santa Cruz River Health Assessment

**“You need a long-term vision and to engage now  
to make good things happen in the future.”**

- Laurinda Oswald ,  
Rancher and Sonoran Institute Board Member;  
Amado, Arizona

“ **Creating lasting change is possible when we start with scientific research, use that data to work with policymakers and then utilize the policies to encourage public education.** ”

-Amy McCoy, Ph.D.  
Project Manager, Santa Cruz River Initiative

**M**any see rivers as symbols of life. View the Santa Cruz River from the sky—a lush ribbon of green flowing through the Sonoran Desert—and you’ll understand why. Although it constitutes just a tiny fraction of the overall land area in southeastern Arizona and northwestern Mexico, the river supports among the highest density and abundance of life in the region.

Along with plants and animals, the river sustains people living in the area who rely on it as their primary source of water. In an arid region that has grown rapidly in recent years, meeting the competing needs of people and nature is a tall order.

How is the river handling these demands, and how can we promote and sustain its long-term health? These are the questions that a new Sonoran Institute report, *A Living River—Charting the Health of the Upper Santa Cruz River* seeks to answer. The report focuses on a 20-mile stretch of the river between Rio Rico and Amado, Arizona, called the Upper Santa Cruz. This stretch of river is particularly interesting, as it provides important benefits to local communities but, it also depends upon a water source generated by urban populations.

River water along this stretch comes mostly from treated municipal effluent discharged from the Nogales International Wastewater Treatment Plant in Rio Rico. Effluent from Nogales, Sonora (Mexico) and Nogales, Arizona, keeps the river flowing during prolonged droughts and provides a steady source of water throughout the year.

As a result of this perennial flow, a healthy and functioning river and riparian system offer numerous benefits to local communities. Namely, riparian vegetation naturally slows flood flows; tree roots control erosion; floodplain soil filters water; and the riparian area provides important wildlife habitat and contributes to the culture and heritage of the region.

The Institute’s report identifies 10 specific indicators of river health to track annually. Using this as a baseline, the Institute can effectively work with communities on targeted conservation actions. Annual testing will show changes over time, helping to determine the effectiveness of these conservation measures.

The baseline test of water year 2008 indicated that poor water quality degraded the health of the river during that period. Significant improvements are expected after an upgrade at the Nogales treatment plant was completed in June 2009. The Institute will assess those conditions in the next Living River report, to be released in mid-2010.





## Santa Cruz River Valley



### Board profile

Laurinda Oswald

Amado, Arizona

Laurinda knows that nurturing an exotic bonsai plant to grow into a healthy and beautiful work of “living art” takes patience and planning. “Big-picture, long-term thinking” is how she describes it, and it’s what she’s used in her spare time to create hundreds of bonsai sculptures, some of them now 25 years old. Forward thinking has also kept her 2,000-acre ranch on the Santa Cruz River in Amado healthy and beautiful, and it’s what led her to become the Sonoran Institute’s newest board member. “I’ve always liked the Institute’s big-picture thinking,” she says. “A lot of my thinking

is out beyond the boundaries of my land, but also 30 years down the road, and that’s what the Institute does well. They understand that change doesn’t happen quickly. You need a long-term vision and to engage now to make good things happen in the future.” Born in Arizona, Laurinda spent her childhood in Italy, her father’s homeland. After a stop in New York, she returned to Arizona in 1982 and runs the ranch her family bought in the 1950s. Operating a 170-head, cow-calf operation, she sells calves and older cows, and raises steers for locally grown, grass-fed beef. Living on the Santa Cruz River for decades and weathering increasingly damaging floods (the last one swallowed 100 acres of her arable land), she understands the importance of caring for the watershed and uses the cattle to manage the land. By moving them like bison through an eight-pasture rotation grazing system, she keeps the grassland healthy, preserves the watershed and backs up the ranch’s water rights.

“I’ve always liked the Institute’s  
big-picture thinking.”

-Laurinda Oswald



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# Growing Smarter

The Institute Helps States Rethink Growth Policies

“ Collaboration is hard to pull off,  
but the Sonoran Institute is good at it. ”

-Alan Nicholson,  
Developer & Conservationist; Helena, Montana

Lost rural character and open space, destroyed wildlife corridors and habitat, spoiled water resources, and high societal costs for providing services and infrastructure: the consequences of poorly planned growth in the West are all too familiar. The good news is that the current construction slowdown gives states and communities an opportunity to reflect on how they can make better choices in the future. The Institute has been active in building coalitions, educating citizens and advocating for improved state-level smart growth policies.

Led by the Institute's Tim Davis, the **Montana Smart Growth Coalition** witnessed a very successful legislative session in 2009, with the Montana Legislature passing a series of laws aimed at helping communities grow in a smarter way. The state's new "flagship" law includes seven smart growth statutes that modernize a broad swath of Montana's zoning and subdivision laws, making smart growth much easier for counties and communities.

With support from the Institute's Jim Whalen, the **Wyoming** Legislature passed three significant laws in 2009 boosting local authority to restrict rural sprawl. Under the new laws, county commissioners now have more power to fight the breakup of large working agricultural landscapes and important wildlife habitat. The laws also protect consumers from misleading land sale advertisements.



## The Institute Helps States Rethink Growth Policies

**“Montanans of all political stripes have come to realize that if we are going to protect those things that make Montana special, we have to work together.”**

Tim Davis,  
Project Manager, Montana Smart Growth Coalition

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Rich McClintock, the Institute's Colorado policy director, is helping **Colorado** rethink its policies on transportation and community development patterns. The Funding Advancement for Surface Transportation and Economic Recovery legislation passed in 2009 will bring in at least \$15 million annually for public transit projects and bicycle and pedestrian safety.

In **Arizona**, the Sonoran Institute has teamed up with some nontraditional partners to build Arizona's first Livable Communities Coalition. Seniors, community developers, transportation advocates, architects, developers, elected officials, and others have come together through the Institute's Community Design Academy to encourage better development patterns in the state.





## Donor profile

### John McBride

Aspen, Colorado



Ranching, development and conservation may seem to be an unusual mix of passions to most people, but not to John McBride. Involved in the initial development of both the Vail and Snowmass resorts, and later as the driving force behind the Aspen Business

Center and the North Forty employee housing project, John has built a reputation for implementing responsible growth plans and green building designs. As a developer, he has also seen what short-sighted thinking and sprawling development have done to the landscapes and resources of the Centennial State.

“Every region of this state is under tremendous pressure, trying to manage a growth rate that is four times as fast as the rest of the United States,” says John, who lives on a working cattle ranch in western Colorado and is also a longtime pilot. “I have seen too many working ranches and open landscapes disappear, only to be replaced with sprawling subdivisions and generic commercial development.” His concern over land-use issues inspired him in 1993 to found the Sopris Foundation with his daughter Kate. The foundation focuses on preserving community, open space and working ranches in the West.

“Our zoning and tax laws often force land conversions that make no sense,” John says. “If this doesn’t change, the ruination of the West will accelerate.” The Sonoran Institute’s capacity to see long-term is unique, he says, and a quality worthy of active support. “Generally, Americans are focused on the short-term; this fact makes the long-term thinking of the Sonoran Institute vital to the future of the West.”



## Donor profile

### Alan Nicholson

Helena, Montana

Alan was practicing smart growth in the 1970s, and while he may not have known the term yet, he understood that what he was doing was progressive. He had

seen the effects of sprawl living in Chicago as a graduate student at Northwestern. So when he later left a career in education to become a developer, he chose to build in the central business district of Helena, Montana, locating his housing development in an area that already had services and infrastructure and was within walking distance to downtown. His latest smart growth project is a mixed-use development just completed in downtown Helena that includes a hotel, bank, movie theater, retail and office space, restaurants, the ExplorationWorks museum and a hand-built carousel. Deeply concerned about the impact of humans on the environment, Alan worries that a prevailing “us versus them” attitude impedes thoughtful, necessary solutions—be it in national politics or among the ranchers, planners and developers in his home state. He donates to the Sonoran Institute because he sees the Institute bringing diverse groups together and helping them arrive at solutions that make sense for everybody. “I have five kids and two grandchildren,” he says, “and I’d like to leave behind a world that is workable for them. The Sonoran Institute doesn’t just deal with ideas. They get out in the field and deal with folks who have more in common than they might imagine, and they bring them together. Collaboration is hard to pull off, but the Sonoran Institute is good at it.”



**“If we are to preserve the unique characteristics of this region  
that attracted many of us here and that we love, we have to  
find a way to strike a balance between the needs of people and  
the needs of the natural world. I believe the Sonoran Institute  
does this better than any other organization.”**

-Bryan Morgan,  
Sonoran Institute Board Member, Boulder, Colorado



# Room to Roam

## Westwide Initiatives Protecting Wildlife Corridors and Habitat



The Morongo Basin in the Mojave Desert of Southern **California** is a fragile and diverse ecosystem. Its starkly beautiful landscape is home to mountain lion, bobcat, desert bighorn sheep, the desert tortoise and other species whose survival depends on room to roam. But like other beautiful places across the West, this is also an area where people want to live and where sprawling development threatens wildlife habitat and migration corridors.

Engaged in projects from **Mexico** to **Montana**, the Institute works to reduce wildlife habitat fragmentation and conserve critical landscapes in areas where people and wildlife intersect. Recent policy efforts, including the Western Governors Association's Wildlife Corridor Initiative and the State Wildlife Action Plans, have resulted in new ecological research and recommendations for wildlife conservation in each state—and created a golden opportunity for the Institute. “With our expertise in community problem solving and land use planning with local governments,” says the Institute’s Training & Community Leadership Director Marjo Curgus, “the Institute is uniquely positioned to help communities across the West understand how to apply the science and implement these recommendations.”

To this end, the Institute has developed a “Planning for People and Wildlife” workshop to inform communities and regional partner counties about the economic benefits of wildlife, and train them how to protect wildlife habitat through comprehensive planning and land-use practices. The first workshop took place in **Montana** in July 2009, with others planned for 2010.

The Institute is also implementing a wildlife restoration plan in the Colorado River Delta in **Mexico**. As part of an effort to restore active water flows into the river, the plan will help attract birds and wildlife back to the Delta region, where they can use the restored river corridor for food, protection and migration.

The Morongo Basin project area, sandwiched between Joshua Tree National Park and a large U.S. Marine base, occupies a vast web of overlapping government jurisdictions and private lands. Working with the Morongo Basin Open Space Group, the Institute recently completed a community outreach process with hundreds of residents to identify important community values and key land areas in the Basin as priorities for protection. Planning partners will use this successful process as the foundation for a collaborative open space conservation plan for the entire region. The project is ambitious, providing more protection for public lands and sensitive wildlife areas, while encouraging communities to adopt wildlife-friendly measures into local codes and ordinances.



**You need the science, but you also need the community values. We needed to know what local residents treasure about this region and their community.**

Stephanie Weigel,  
Project Manager, Morongo Basin



## Staff profile Marjo Curgus

Training & Community Leadership Director  
Salida, Colorado

Marjo was still in planning school at the University of New Mexico when she heard Luther Propst speak at a conference and vowed to someday work for the Sonoran Institute. She has never looked back. “The Institute’s values of taking a collaborative approach to decision-making and its commitment to community building still resonate strongly with me,” she says. In her role, she provides community leaders with tools to help them advance their community goals, and to transcend the conflicts so prevalent throughout the West: rancher vs. environmentalist, urban vs. rural, liberal vs. conservative. “To overcome these divisions and lead, you must first have faith in the goodness of all people, and believe 100 percent that people want to make good decisions and will arrive at the right decision if you provide them a safe, productive space in which to dialogue. For me, it is this commitment to informed and civil dialogue that is the Sonoran Institute’s biggest selling point.” When she isn’t juggling projects, facilitating community meetings, giving presentations or conducting training throughout the West, Marjo is playing in the places she works all week to protect. “I am into whitewater kayaking, telemark skiing, mountain biking, and trail running. I love to cook and feed my friends and am trying to become a gardener, which is humbling in the Rocky Mountains. I also love to read and have a very small art studio in my house. If I did not have to work, I would probably be living out of a backpack, wandering the world.”

Email Marjo at [mcurgus@sonoraninstitute.org](mailto:mcurgus@sonoraninstitute.org)



## Staff profile Francisco Zamora Arroyo

Program Director of the  
Upper Gulf Legacy Program  
Tucson, Arizona

When you work in the desert your day begins early, and Francisco is in the field at 5:00 a.m. to avoid

the heat in the Colorado River Delta. As the Institute’s program director of the Upper Gulf Legacy Project, Francisco works from offices in Tucson, Arizona and Mexicali, Baja California. A native of Mexico City, Francisco says he was drawn to the Sonoran Institute “by its work in Mexico, and particularly its commitment to work with local communities and on projects that provide a direct benefit to people and wildlife.” At the Institute, Francisco took the opportunity to build the program in the Delta and now has an office and an enthusiastic staff in Mexicali. The amount of government and private funding directed toward conservation is the main difference between working in Mexico compared to the U.S., Francisco says. “Our support from Mexico for the Delta is growing, but it is still much less than the support for similar efforts in the U.S.” He is encouraged, though, by a growing conservation movement in Mexico. When he’s not in the Delta, Francisco can be found at the soccer field with his daughter or the library with his son. He and his wife are also active in their church and regularly spend time learning more about their faith. “I am passionate about my family and the opportunity I have to be with our kids as they grow,” he says. “I also like sports and carpentry, and recently became interested in learning more about the theology and spirituality of environmental conservation.”

Email Francisco at [fzamora@sonoraninstitute.org](mailto:fzamora@sonoraninstitute.org)







## Board profile Bryan Morgan

Incoming Chairman of the Board  
Boulder, Colorado

Bryan's path to the Sonoran Institute began, appropriately enough, on a hiking trail. After working 40 years in trial law and criminal defense, he was phasing out of full-time practice and mentioned to his daughter who he was hiking with, his interest in getting involved in conservation. She told her boss, who called Luther Propst. "I think

Luther was scouting for Colorado members," Bryan laughs. "So here I am." After five years on the board, Bryan will be chairman in 2010. While his focus on conservation may be recent, his love and interest in the outdoors go back to his childhood in Fort Collins, Colorado. In what was then a tiny farming town, he developed a lifelong passion for the outdoors and for "living in a state with wide horizons and wild country." He became interested in environmental law at the University of Colorado at Boulder Law School, where he was a research assistant for Joseph Sax, considered to be one of the principal founders of the environmental defense legal movement. Bryan's involvement with the Institute unites this early interest in "environmental defense" with his passion for the wild places of the Rocky Mountain West. "What I find interesting about the Institute," he says, "is that a lot of times it concentrates on matters that may not light people's eyes up, like transportation planning and zoning and building codes. And yet, there's an enormous conservation value in doing those things carefully. If we are to preserve the unique characteristics of this region that attracted many of us here and that we love, we have to find a way to strike a balance between the needs of people and the needs of the natural world. I believe the Sonoran Institute does this better than any other organization."

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# 2009 Report Roundup

2009 *WestWord* – Results Driven by Leadership

*A Living River* – Charting the Health of the Upper Santa Cruz River

*Land of the Kwapa* – The Colorado River Delta

*Riding the Rails to Sustainability* – Facts About the Economics and Ecology of Rail Travel

*Western Landscapes in the Crossfire* – Urban Growth and the National Landscape Conservation System

*Gallatin County* – Fiscal Impact Analysis

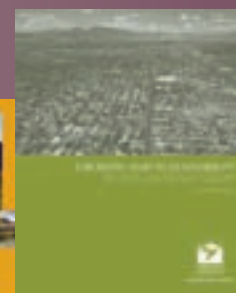
*A Citizen's Guide to Federal Land Disposal*

*Uranium Mining, Tourism and Outdoor Recreation in Gateway, Colorado*

*Growth and Sustainability in the Las Vegas Valley*

*Planning for People & Wildlife* – A Workbook for Montana's Citizens and Local Officials

*Straw Bale Forum 2009* – Greening Arizona

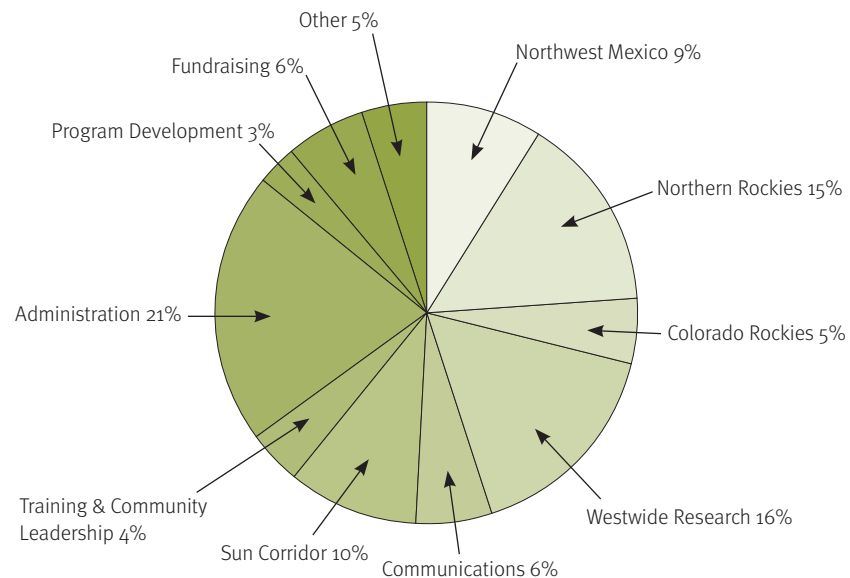
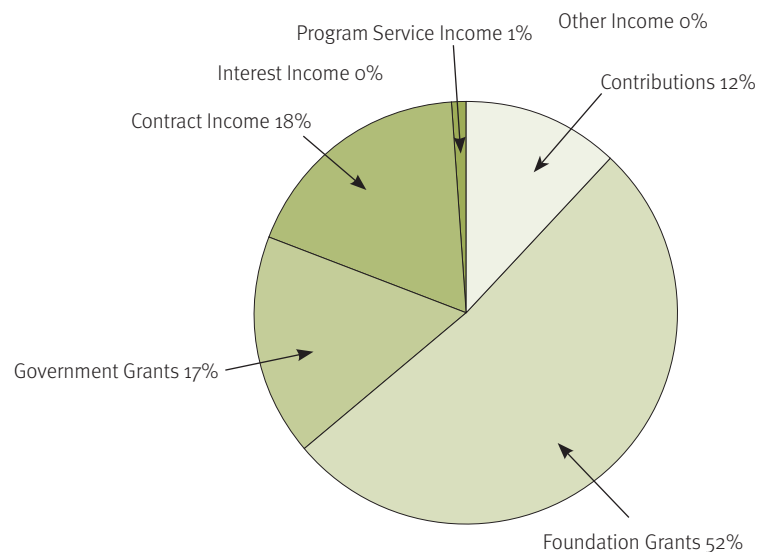


# FINANCIAL SUMMARY

FY 2009: July 1, 2008 to June 30, 2009

REVENUE			EXPENSES		
Contributions	\$543,034	12%	Northwest Mexico	\$456,773	9%
Foundation Grants	\$2,352,528	52%	Northern Rockies	\$754,154	15%
Government Grants	\$789,806	17%	Colorado Rockies	\$238,105	5%
Contract Income	\$806,632	18%	Westwide Research	\$838,297	16%
Interest Income	\$6,775	0%	Communications	\$299,939	6%
Program Service Income	\$29,269	1%	Sun Corridor	\$513,333	10%
Other Income	\$4,592	0%	Training & Community Leadership	\$203,925	4%
	<u>\$4,532,636</u>	<u>100%</u>	Administration	\$1,089,554	21%
			Program Development	\$164,628	3%
			Fundraising	\$319,772	6%
			Other	<u>\$246,508</u>	<u>5%</u>
				\$5,124,988	100%
Prior year Net Assets	\$1,476,359				
Sources available for Programs/Operations	\$6,008,995				

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