





2018 ANNUAL REPORT



The Montana Land Reliance partners
with private landowners to permanently protect
agricultural lands, fish and wildlife habitat,
and open space.

The immediate accomplishments of MLR's
conservation work are measured in miles of
streambank preserved and acres of land protected.

The lasting benefits of MLR's work
are the perpetuation of a lifestyle and an economy
that rely on responsibly managed private land
and the increasingly valuable Montana open spaces
that will continue to nourish the spirit
of future generations.





This year, the staff at The Montana Land Reliance (MLR) is remembering MLR's past and planning for its future, celebrating MLR's 40-year history and looking to the next 40, saying goodbye to valued staff, and welcoming new, talented faces.

I am pleased to present MLR's 40th Anniversary annual report. You'll read a wonderfully written narrative history of MLR by our new, multi-talented Eastern Manager, Brad Hansen. You'll learn about how apple trees in the Bitterroot Valley helped catalyze the formation of MLR. You'll also read profiles of two Montana ranching families and how they have passed ranches, conservation easements, and a conservation ethic on to the next generation: the Berg family from Lennep, and the Gilman family from Sheridan. Finally, you'll meet the 2018 William F. Long Award winner – the Rath family who ranches in the sage country between Roundup and Lavina.

One of the biggest highlights for MLR in 2018 was receiving the President's Award from the Land Trust Alliance (LTA), an award that has only been given four other times since 1982. LTA recognized MLR for its impact on conservation in Montana, across the West, and throughout the entire nation. This award is given on a selective basis to an individual or organization "whose leadership has enriched the land conservation movement and whose contributions encourage commitment and action throughout the land trust community and private landowner community." Standing on the stage at LTA's national convention with other MLR staff in front of over a thousand people was a humbling moment.

This prestigious honor bestowed upon MLR shows that the hard work and dedication of MLR's staff has impacted the conservation of farm and ranch lands both in Montana and nationally.

Over the last 40 years, MLR has had a profound and lasting impact on our state and nation that wouldn't have been possible without the work and dedication of retiring Managing Directors Rock Ringling and Jay Erickson.

As almost everyone in the MLR family knows, Rock stepped away from day-to-day management of MLR in August 2018 after 28 years of service. He won't be too far away; in his retirement he will still be doing what he does best – helping MLR maintain many relationships and, of course, fishing. When Rock came aboard in 1990, MLR held a little over 20,000 acres under easement; now, we have over 1,000,000 acres. One of Rock's most significant contributions was his dedicated and unwavering work on securing permanent federal tax incentive legislation for conservation easements, which paved the way for huge gains in private land conservation across the nation.

MLR also said goodbye to retiring Managing Director, Jay Erickson, who is leaving after 18 years. Jay came to us from a job with the Internal Revenue Service (IRS). He brought a unique legal perspective along with a commitment to conservation. His love of fishing was an added bonus. Jay's contributions on the national Land Trust Accreditation Commission have helped the land trust community maintain the trust of Congress, the IRS, the public, and landowners.

The tireless work and commitment of both of these dedicated employees have earned MLR respect from people and organizations across the United States, and we are stronger than ever due to their leadership.

I am excited to welcome the two talented and hardworking replacements for Rock and Jay: Kendall Van Dyk, who has been with MLR for eight years, and Jordan Vana, who comes to us with extensive experience from land trusts in Wyoming and Colorado.

I would be remiss if I did not mention that the success of MLR is made possible by the steady and guiding hand of Managing Director, Lois Delger-DeMars, the glue that holds us all together. Lois ensures that MLR attends to detail and compliance, from maintaining financial records to strong, accurate easements to efficient management of the functions of the office. Her commitment to detail gives us comfort that we are both doing the right thing and doing it properly.

MLR has reinforced its commitment to helping landowners put even more land under conservation easement using different tools and new strategies, such as pursuing Agricultural Land Easements through the Natural Resources Conservation Service, which protects the agricultural use and conservation values of eligible land.

When the idea to pursue 1,000,000 acres came up at a board and staff retreat at the B-Bar Ranch in the Paradise Valley many years ago, we weren't sure it was possible. But we did it.

As we look forward, MLR will continue to push the limits of what is possible and continue to protect Montana's working farms and ranches for future generations.

– George Olsen, President, MLR Board of Directors

SINCE 1978

The Montana Land Reliance
has worked with private
landowners all across Montana
to meet their conservation
goals, including the protection of
major watersheds critical to
agriculture and wildlife habitat.

1,070,455 ACRES

of ecologically, agriculturally, and
historically important land,
and 1,766 miles of streambank
are now protected under MLR's
872 conservation easements.

ACREAGE BY HABITAT

Crop/Hay/Pasture
179,931

Range/Forest
890,526

Elk Habitat
571,801

Wetlands
43,064

Greater Yellowstone
Ecosystem
307,234

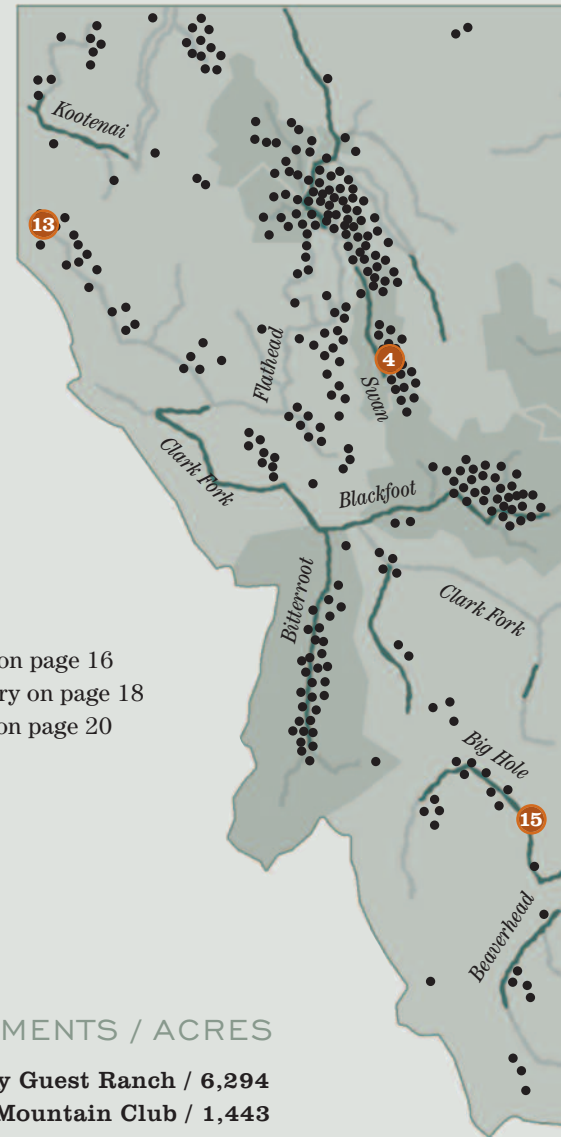
Northern Continental
Divide Ecosystem
20,073

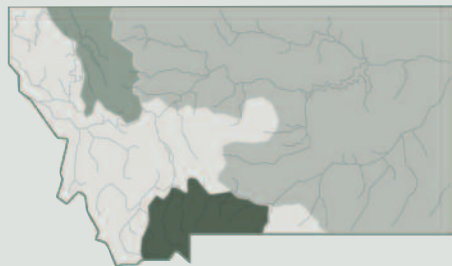
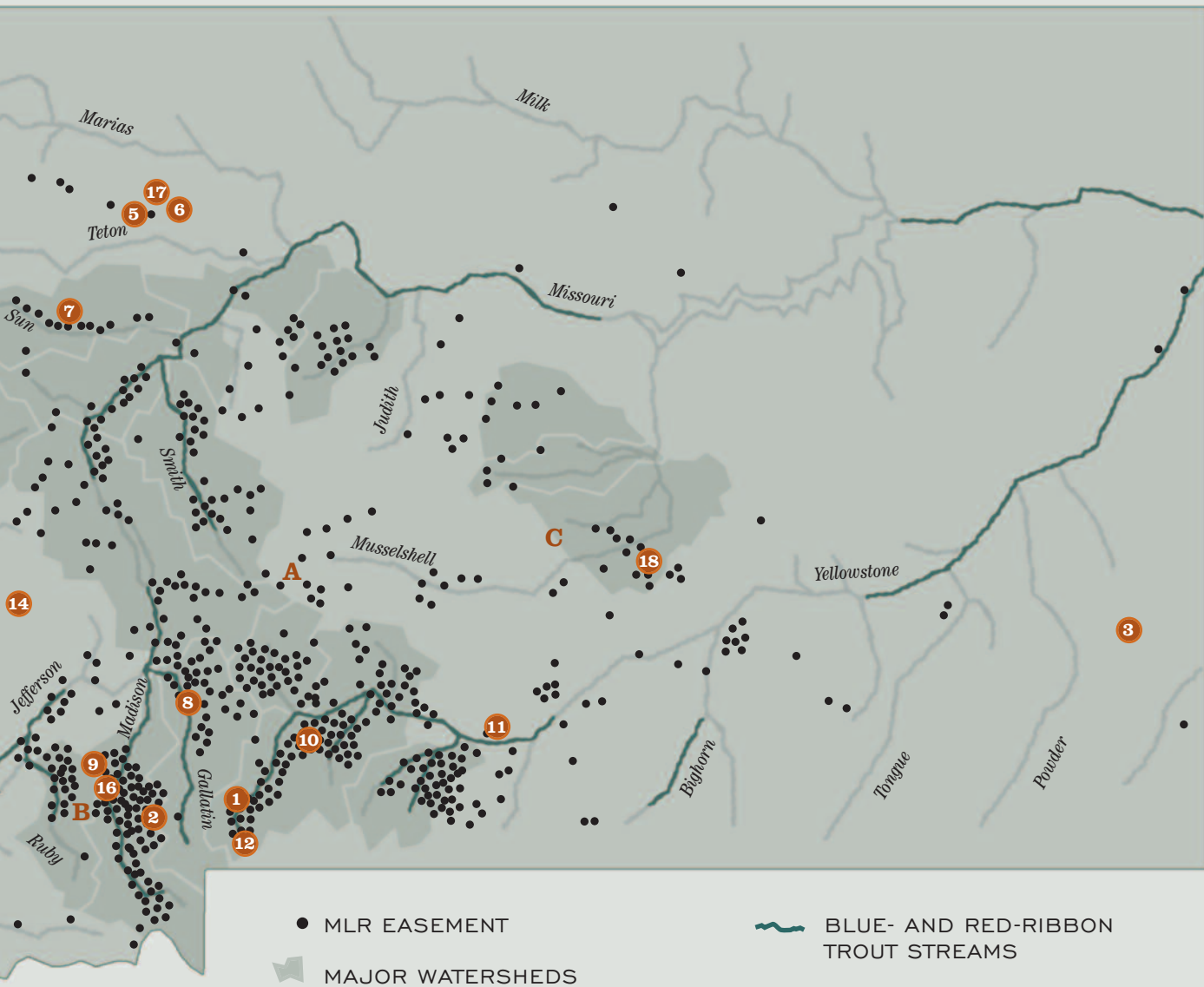
- A** Bergs / Story on page 16
- B** Gilmans / Story on page 18
- C** Rathes / Story on page 20

2018 EASEMENTS / ACRES

- 1** Mountain Sky Guest Ranch / 6,294
- 2** Yellowstone Mountain Club / 1,443
- 3** Ringling Property II / 4,443
- 4** Swan Valley Connections / 158
- 5** Circle S Ranch III / 480
- 6** Perry Property / 1,070
- 7** Hansen Property / 302
- 8** Cochran Property / 45
- 9** Guyette Property II / 41
- 10** Hudson Property / 262
- 11** Newell/Walton Property / 151
- 12** Shryer Property / 70
- 13** Hutchins Property VII / 207
- 14** Lockhart Meadows / 703
- 15** Diamond T Livestock / 529
- 16** Madison Valley Garden Ranch II / 1,626
- 17** Bliss Property / 3,990
- 18** Eppich Ranch / 7,615

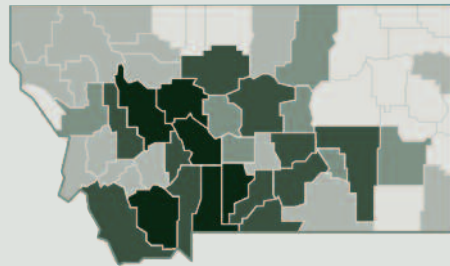
ACRES PROTECTED: 29,429





ECOSYSTEMS

- Greater Yellowstone
- Northern Continental Divide
- Northern Great Plains



EASEMENT DENSITY BY COUNTY

- 1-10,000 acres
- 10,001-25,000 acres
- 25,001-50,000 acres
- More than 50,000 acres

40 YEARS

RELIANCE means to depend on or trust in something. MLR intended to be the organization that landowners, especially farmers and ranchers, could depend on and trust in.

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The existence of The Montana Land Reliance is due, in part, to apple trees in the Bitterroot Valley.

During the “apple boom” of the early 1900s, real estate investors in the valley saw an opportunity. They bought up the land, planted apple trees, then subdivided the valley into small 5-, 10-, and 20-acre parcels. The land, which had been purchased for as little as \$2 an acre, was then sold for \$1,000 an acre to eastern buyers who were led to believe that they would get rich with little effort growing and selling delicious McIntosh apples. By 1920, there were over 750,000 fruit trees in the valley covering over 10,000 acres.

Every boom is followed by a bust, and by 1950 the Bitterroot supported fewer than 40,000 fruit trees. Growers’ dreams of apple cider riches were squashed by two kinds of pests: swindling middlemen who took the apples and never paid, and the codling moth, which showed up in the 1930s and burrowed deep under the apples’ skins, turning the sweet fruit into sour mush. During the 1960s and 1970s, failing orchards were ripped from the landscape and replaced by subdivisions, golf courses, and shopping centers. Land prices soared, making it increasingly difficult for the remaining agricultural producers to stay on the land.

The transformation of the Bitterroot Valley was of special concern to a young undergraduate student at the University of Montana (UM) named Christine Torgrimson. She worried that if something wasn’t done to help farmers and ranchers stay on the land, the same type of unchecked subdivision and unplanned development would befall other Montana valleys. Christine grew up in Missoula, a stone’s throw from the Clark Fork and a short drive from the Bitterroot’s orchards. She came from a ranching family and was raised, in part, by her grandparents, who had homesteaded at Camas Prairie near Plains, Montana.

While at UM, Christine completed a study on land development in the Bitterroot Valley. That led to work with the Environmental Quality Council, and then with the Montana Environmental Information Center (MEIC).

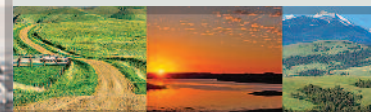
At MEIC, Christine led a statewide subdivision inventory. Christine and a team of volunteers hand drew 3-by-5-foot county maps depicting the spread of subdivision activity in the state.

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**Christine Torgrimson, left,
and Barbara Rusmore**



MLR file photo



The team estimated that in 1975, around half a million acres in Montana had been subdivided into 20-acre or smaller lots.

Christine's research was presented to the Montana Legislature in conjunction with the lobbying efforts of ranchers in the Blackfoot Valley who sought to pass a comprehensive easement law allowing for private land conservation. The effort failed in 1974. However, in 1975, the ranchers tried a different approach by amending the existing 1969 Open-Space Land Act, which only allowed for conservation by public entities, to also allow for private land conservation through a qualified nonprofit organization or land trust. This effort was successful and the amended act, named the "Montana Open-Space Land and Voluntary Conservation Easement Act," became law under House Bill (HB) 341.

With the passage of new legislation, the stage was set for the founding of The Montana Land Reliance (MLR).

Three years after the legislation passed, an energetic Californian with experience in private land conservation showed up on the scene.

Like Christine Torggrimson, Barbara Rusmore saw her own Silicon Valley transform from a maze of apricot orchards and productive agricultural lands into subdivided and expensive real estate that catered to tech companies. She recalled as a twelve-year-old girl being emotionally attached to the orchards and feeling anger and sadness as the trees were "torn from the landscape, their carcasses piled on the side of the road, to be burned or chopped into oblivion."

After graduation, Barbara worked on private land conservation projects on the west coast and developed relationships with foundations focused on environmental and social issues. She also spent time meeting with agricultural producers who discussed the difficulties of staying in business, especially given the speculative nature of land values in California. In 1975, Barbara met and fell in love with Jack Schmidt, a geomorphologist who found work in Helena, Montana. After moving, Barbara found MEIC and Christine. The two quickly discovered their shared interests and began looking into ways to address the fragmentation of agricultural lands in Montana.

Christine had just finished writing a proposal with the goal of matching aspiring young farmers with producers who were retiring. The idea was to create a system of land transactions in which farmers and ranchers could pass on the land to the next generation rather than selling out to



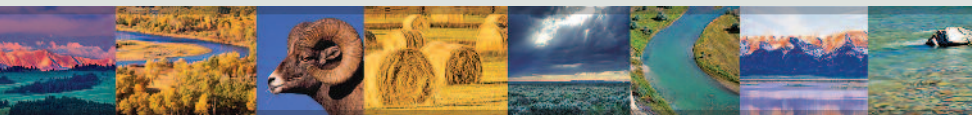
MLR file photo

1985

MLR board and staff

1995

Staff invents
"Cows not Condos"



1978

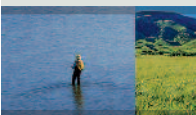
First conservation
easement, 321 acres

1992

100,000 acres

1996

200,000 acres



developers. Barbara added context to the proposal with other important input from Phil Tawney at MEIC, The Nature Conservancy (TNC), and environmental lawyers in San Francisco that Barbara knew. The two women looked at conservation models on the east coast and in Canada. They liked the Saskatchewan Land Bank in particular because it took the speculative nature of land out of the equation. In Canada, the provinces owned the farmland, and made it available to farmers and ranchers via long-term leases.

A model so bold as a land bank in Montana, however, would have required more legislation, and there was neither time nor money for that. Instead, Christine and Barbara narrowed their focus to conservation easements and forming a land trust that could take advantage of newly passed HB 341. In a tiny office down the hall from MEIC, the two women came up with a name, the “Montana Trust for People and Land,” and wrote down a mission statement: “to establish a renewable and equitable agricultural way of life in Montana.”

Right out of the chutes, they ran into a problem. The state wouldn’t recognize the name. At the time, the banking industry had exclusive rights to use the word “trust.” Barbara recalled that they sat for several hours with a thesaurus and flip

chart writing names on the wall. At some point Christine said, “Land Reliance, that’s it!” The name felt right, and for good reason. Reliance means to depend on or trust in someone or something. MLR intended to be the organization that landowners, especially farmers and ranchers, could depend on and trust in.

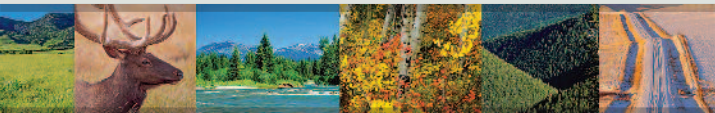
So, in 1978, with little fanfare, MLR was founded. For a board, Christine and Barbara recruited Bill Milton, Chase Hibbard, and Jon Roush. Bill Long, a recent graduate in economics at UM and friend of Christine’s, was hired to help get things moving. The next year, George Olsen, Allen Bjergo, and Sharon Peterson joined the board, bringing additional expertise. Phil and Robin Tawney at MEIC and Bill Bryan at Northern Rockies Action Group (NRAG) were also among MLR’s early champions, as were Max Milton, Dana Milton, and others.

1981–1982

On the banks of Montana’s famous trout streams, potential easement donors and benefactors learned about MLR. This fundraising mechanism became known as the “trout route.”



MLR file photo



1997

500 miles of streambank



Laying the foundation of an organization is hard work, and MLR faced two major challenges.

First, the staff and board needed to clearly define their vision. Second, they had to figure out how to fund it. George Olsen recalled sitting in the MLR office with butcher paper taped to the walls. On the paper were written the staff and board's ideas and the goals that they wanted to achieve. Those early brainstorming sessions were critical in defining how the new organization would look and operate.

Chase Hibbard, a fourth-generation Montana rancher who had a background in banking, advised the group to keep the focus on providing

good options. He recalled recommending, "Don't legislate it, don't force it. Provide landowners the right tools, and if it's right for them, it will fall into place." From the beginning, MLR decided to stay out of the land management business, and instead, focused on providing information and expertise in the area of conservation easements.

Patience, trust, and a focus on preserving agriculture and ranching were several of the core tenets that emerged from those early meetings. So was the commitment to remain apolitical. As longtime board member Rick Berg put it, "MLR has worked extraordinarily hard since the beginning to remain politically neutral. It would be easy to veer to the left or right, but doing so would have taken away the ability to talk with neighbors and build relationships."

SINCE 1985

MLR has presented an annual Conservation Award to those who have made a significant contribution to private land conservation.

1985	Otto Teller	2001	Greg & Anne Avis
1986	H. G. Wellington, Jr.	2002	Larry & Claire Wilson
1987	Amelia & Bryan Hilger	2003	Ken & Linda Wilson
1988	Bill Towne	2004	Judy Hutchins
1989	Robert & Helene Beck	2005	Frank & Susan Borman
1990	Ken Siebel	2006	Max Baucus
1991	Bill & Ejie Dana	2007	Bob & Annie Graham
1992	William S. & Camille Broadbent	2008	David Leuschen
1993	Bill & Dana Milton	2009	John & Sandra Roe
1994	Irv Weissman	2010	Andrew C. Dana
1995	Ned & Linda Morgens and Bob & Elsie Gruel	2011	Andrew Laszlo, Jr.
1996	Elise Donohue	2012	Lee & Glynna Freeman
1997	Cathy Campbell	2013	Roy & Susan O'Connor
1998	Susan & Jack Heyneman	2014	Gary Anderson
1999	Ed Rosenthal	2015	Bob & Edie Tomasko & Family
2000	Mary Stranahan	2016	Steve & Gretchen Burke
		2017	David Arthun

The 2018 Conservation Award is dedicated to all staff, board members, and trustees past and present, who have worked for four decades to ensure a future for open space in Montana.

Missouri River

1998

300,000 acres

2000

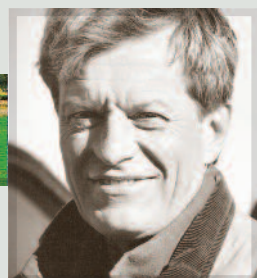
400,000 acres

Building relationships with both landowners and prospective supporters was especially crucial in the early years as MLR had not yet established a pipeline for funding. The situation became dire in 1981. George Olsen, MLR Board Treasurer, showed up to the scheduled board meeting and reported that they had \$39 in the bank with payroll due at the end of the week. It was a critical moment. Allen Bjergo, who was at the meeting recalled, “We had three completed easements, and \$39. We sat and looked at each other, said, ‘Shall we fold this thing up?’ But we decided to forge ahead.” A hat was passed around the room and the board members wrote checks; enough to pay the staff and keep the doors open.

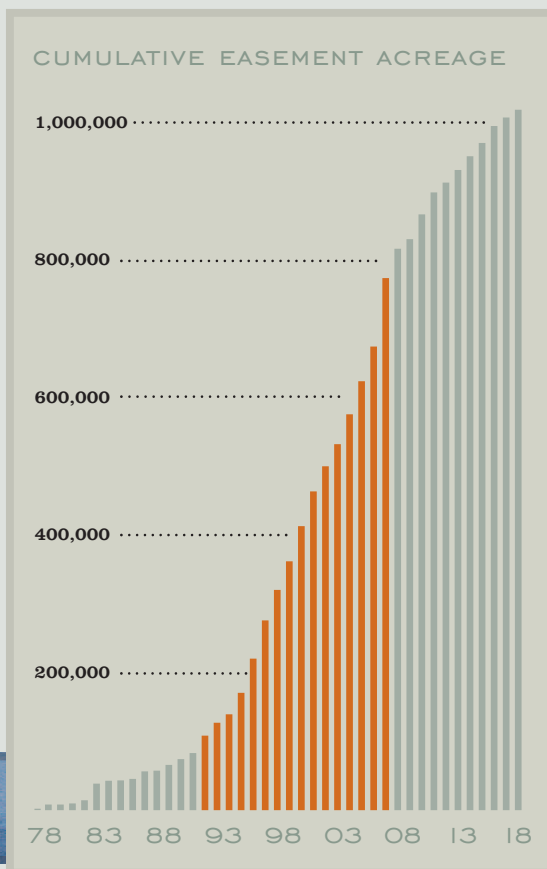
It was at this low point that MLR hired Bill Dunham, a fire alarm salesman who loved American literature and fly fishing. Bill brought an entrepreneurial spirit and energy to the nonprofit that was needed. By that time, Christine Torgimson and Barbara Rusmore had left MLR to pursue other interests. So, with the support of the board, Bill Dunham and Bill Long began developing new relationships with a wide array of people from all over the United States, primarily through fly fishing. On the banks of Montana’s famous trout streams, potential easement donors and benefactors learned about MLR. This new experiment in fundraising became known as the “trout route.”

During the summer of 1982, Bill Long and Bill Dunham fished with Herb Wellington. Herb had a firm on Wall Street and owned the Longhorn Ranch in the Madison Valley. The previous fall, MLR had begun the process of completing a conservation easement on Herb’s ranch. It was only MLR’s second easement in the Greater Yellowstone Ecosystem, and one of the biggest projects the young nonprofit had undertaken. Bill Long recalled, “MLR was not the only organization wanting to work with Herb. A national organization ran hard after him. They wanted him. He had such a great ranch and connections on Wall Street. But for some reason he picked us. MLR was new, we didn’t have it figured out yet, but Herb believed in us.” The same was true for Sam Gary, Sr., who lived in Denver but owned a summer home on Flathead Lake. Sam fished the Missouri River with Bill Dunham and Bill Long, and gave generously. Herb and Sam’s donations gave MLR the financial infusion needed to move forward.

1993
MLR worked with Senator Max Baucus to create legislation that would allow landowners to pursue conservation easements without owning their mineral rights.



2003
500,000 acres



1990–2007
During the “wild west days” of conservation, MLR completed 659 easements, averaging nearly 39 easements and more than 41,000 acres per year.



With a growing network of individual donors, MLR was able to look to the future.

In 1983, the organization changed its mission statement to focus on “open space” conservation. It became increasingly clear that ecological and social benefits could be realized simply by keeping land undeveloped. So, MLR simplified its mission statement and became an open space, private land conservation organization with one product: the conservation easement. It was also evident that money would be needed to pay for monitoring of easements. That was the promise MLR made to landowners; that they would ensure the terms of the easement were honored, forever.

During the winter of 1984, Bill Long met an aspiring broker named Andy Laszlo at the Dean Witter office in Billings, which at the time was nothing more than a double wide trailer.

Andy recalled that he had no idea what MLR was about, he just needed work. Over the years, Andy became one of MLR’s major supporters, and placed his ranch in the Madison Valley under easement soon after Herb Wellington protected

the Longhorn Ranch. Under Andy’s tutelage, MLR’s original Land Protection Fund investment of \$32,000 grew to over \$12,000,000. Today, Andy continues to oversee MLR’s investments totaling over \$28,000,000.

Gaining momentum, MLR made important hires in Jan Konigsberg, Lois Delger-DeMars, John Wilson, Chris Phelps, Amy Eaton Royer, Chris Montague, and Rock Ringling. If you talk to some of these staff members, they’ll often refer to the 1990s as the “wild west days of conservation in Montana” and blame (or thank) a fishing movie for getting things going. In 1992, Robert Redford released his award-winning film “A River Runs Through It,” which showcased spectacular Montana landscapes and romanticized the sport of fly fishing. Seemingly overnight, Montana riverfront property became a hot commodity.

MLR rode the current, reaching out to recreational property owners across the state, especially in central and western Montana. By and large, these new landowners had no interest in subdividing their properties. They bought ranches for their aesthetic qualities and recreational opportunities, and took advantage of the tax benefits associated with donated conservation easements. Between 1978 and

1989, MLR completed a total of 27 easements. During the Wild West era (1990–2007), MLR completed 659 easements, averaging nearly 39 easements per year.

2000
Staff establishes goals to protect 1,000,000 acres and 1,500 miles of streambank



©kestraelaerial.com

2002
The Woodson family partners with MLR to create the 1,100-acre Ruby Habitat Foundation

MLR file photo



2004
1,000 miles of streambank

2005
600,000 acres

While staff and board members were pleased with the conservation of recreational properties, they felt that easements weren't doing enough to help agricultural producers and their families.

The high interest rates of the 1980s and speculative land values of the 1990s had been particularly tough on producers. MLR understood that for easements to be more useful in succession planning, the incentives needed to be better. At the time, the maximum federal income tax deduction a qualified farmer or rancher could take for an easement donation was 30 percent of

this or her adjusted gross income every year for up to six years. In many cases, farmers and ranchers who made their living off the land would never see the full tax benefit of their donations.

During the winter of 1998, Rock Ringling and Bill Long drove from Helena to Rock Creek to meet with the family of an easement donor who had recently passed away. On the ride over the divide, the conversation turned to the history and finances of Rock's family ranch, which led to a discussion about what could be done to help agricultural producers that rely primarily on agricultural income. Bill recalled, "We asked each other, what could we do to go beyond the 30 percent?" By the time the two returned to Helena, they had ideas.



2007
MLR works with the Hibbard family to complete its largest easement at 40,064 acres



2006
Congress passes first iteration of conservation tax incentives

2007
700,000 acres

Chris Montague, who was hired as MLR's Eastern Manager in 1997, and had worked for Senator Max Baucus in Washington D.C., recalled discussing easement incentives during a fishing trip with Rock and Bill. He remembered, "It happened over cold beer and ham sandwiches on the banks of the Big Horn River. Under the St. Xavier Bridge, we talked about what could be done to better incentivize ranchers and farmers."

In the end, they identified the issue: 30 percent was too little, and six years too short.

When MLR staff reached out to national land conservation organizations about their idea to lobby for changes, nobody paid much attention. The five years that followed were particularly frustrating. As Chris recalled, "Nobody, except us, believed it could be done." Rock remembers spending hours on the phone mobilizing and educating the conservation community.

MLR reached out to all 1,200 land trusts in the U.S., which put pressure on the national land trust community to get on board. Eventually, they did.

In December of 2015, Congress authorized enhanced tax incentives for conservation easements. It took over a decade and more individuals than can be named here to improve the law. Bill Long estimated that MLR put in over \$1,000,000 worth of out-of-pocket expenses and staff time to get the legislation passed, but the benefits were worth the effort. The new easement tax incentives allowed qualified farmers and ranchers (who could show that at least 51 percent of their income was derived from agriculture) to offset up to 100 percent of their taxable income every year for up to 15 years, plus the year the easement was completed. Farmers and ranchers could now take full advantage of the value of their easement donation over a much longer period of time.

2009

Following the retirement of Bill Long, MLR establishes the William F. Long Conservation Award, given to landowners who have worked to permanently protect significant bird habitat. Recipients:

- 2009 Julie & Rod Pribyl
- 2010 Sara Campbell
- 2011 Gilbert Cameron
- 2012 Shorty & Andrea Harlow
- 2013 Joe & Debby Perry
- 2016 Mike & Deb Delaney
- 2017 Don & Carol Roberts
- 2018 Jeff & Bea Rath



Jason Savage

2008

800,000 acres

In addition to improving the conservation easement product, MLR worked hard to improve its internal tracking and day-to-day operations.

Tom Patterson, a young graduate student attending Harvard Business School, reached out to MLR Managing Director, John Wilson, in the 1990s about the prospect of writing a case study about MLR for his program. Tom compiled information from easement donors and board members about what they liked and disliked about the easement process and shared the information with MLR staff. He recalled, "The MLR folks were a really neat group of people. They delivered conservation in a very efficient way that met customers' needs and had a long-term positive outcome."

Patterson held brainstorming sessions where staff gained perspective and discussed ways they could improve. MLR was facing growing pains and needed to scale its operations. From these discussions MLR developed a conservation easement toolkit. The toolkit included an easement tracker, an early version of an Excel spreadsheet, which standardized the way each easement moved through the review process, as well as several templates for drafting easements.

By standardizing the tracking and drafting process, MLR brought consistency and discipline to the organization. Another growing pain involved easement monitoring. It was physically impossible for Chris Phelps, MLR's Land Manager, to visit each property annually as is required by law. So, he developed a system in which seasonal land stewards helped him with the work. He found ideal candidates in retired

Forest Service and Bureau of Land Management employees, and farmers and ranchers who lived near the easements. They perceived themselves as advocates of conservation, not "building police."

As MLR continued its growth into the 2000s and beyond, staff retired, and new faces came on board. Jay Erickson was hired as a Managing Director in 2000 to replace John Wilson. Doug Mitchell, who was hired in 2007, moved into the position of Managing Director in 2009 to replace Bill Long. Five years later, Doug Mitchell left MLR and Lois Delger-DeMars took over as Managing Director. By 2015, Rock, Lois, and Jay managed a staff of 14 full-time employees and 13 seasonal land stewards.

The original three-person board that helped found MLR in 1978 had grown to 13, and the Council of Trustees to over 25. While the wild west days of the 1990s were officially over, MLR continued to see success, including easements on the Flathead and Blackfeet Indian Reservations overseen by Western Manager, Amy Eaton Royer, and the conservation of the 40,000-acre Sieben Livestock property owned by the Hibbard family, which continues to be the largest conservation easement held by MLR in the state.

2010

MLR becomes accredited by the Land Trust Accreditation Commission



2011

1,500 miles of streambank

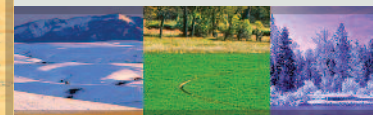
Jason Savage



Missouri River

2015

Tax law permitting agricultural producers to deduct more for a longer period of time becomes permanent



2012

900,000 acres

In 2017, MLR achieved a milestone: 1,000,000 acres and 1,700 miles of streambank under easement.

When asked what inspired him to throw out the million-acre number at a staff meeting in the mid-1990s, Rock Ringling said, “You know, we needed a goal. Nobody thought it was necessarily attainable at the time, but it gave the staff and the board something to focus on.”

In August of 2017, easement donors and holders, supporters, staff, board, and trustees from across the country gathered at the historic Hilger Hereford Ranch outside of Helena to celebrate the accomplishment. Newspapers noted that 1,000,000 acres is roughly the size of Glacier National Park or the Bob Marshall Wilderness.

To protect such an impressive amount of land took the work of many. There are important names and stories not mentioned here who have been integral to MLR’s success over the last four decades. Forty years is a long time for any organization to stay in business. MLR’s accomplishments can be attributed to its clear vision, its tenacious staff and board members, and the landowners who have chosen to exercise a conservation ethic. If you recall, 40 years ago Christine Torgrimson and her team walked into the legislature with hand drawn maps showing that half a million acres in Montana had been subdivided. Today, due to the efforts of many, MLR has mitigated that impact two times over. No other land trust has done more to protect Montana’s open spaces, and there is still much work to be done. MLR will continue to remain true to its past and build on the legacy of those who came before. Here’s to another 40 years!

2017

Current and former staff celebrate MLR’s million-acre achievement at the historic Hilger Hereford Ranch



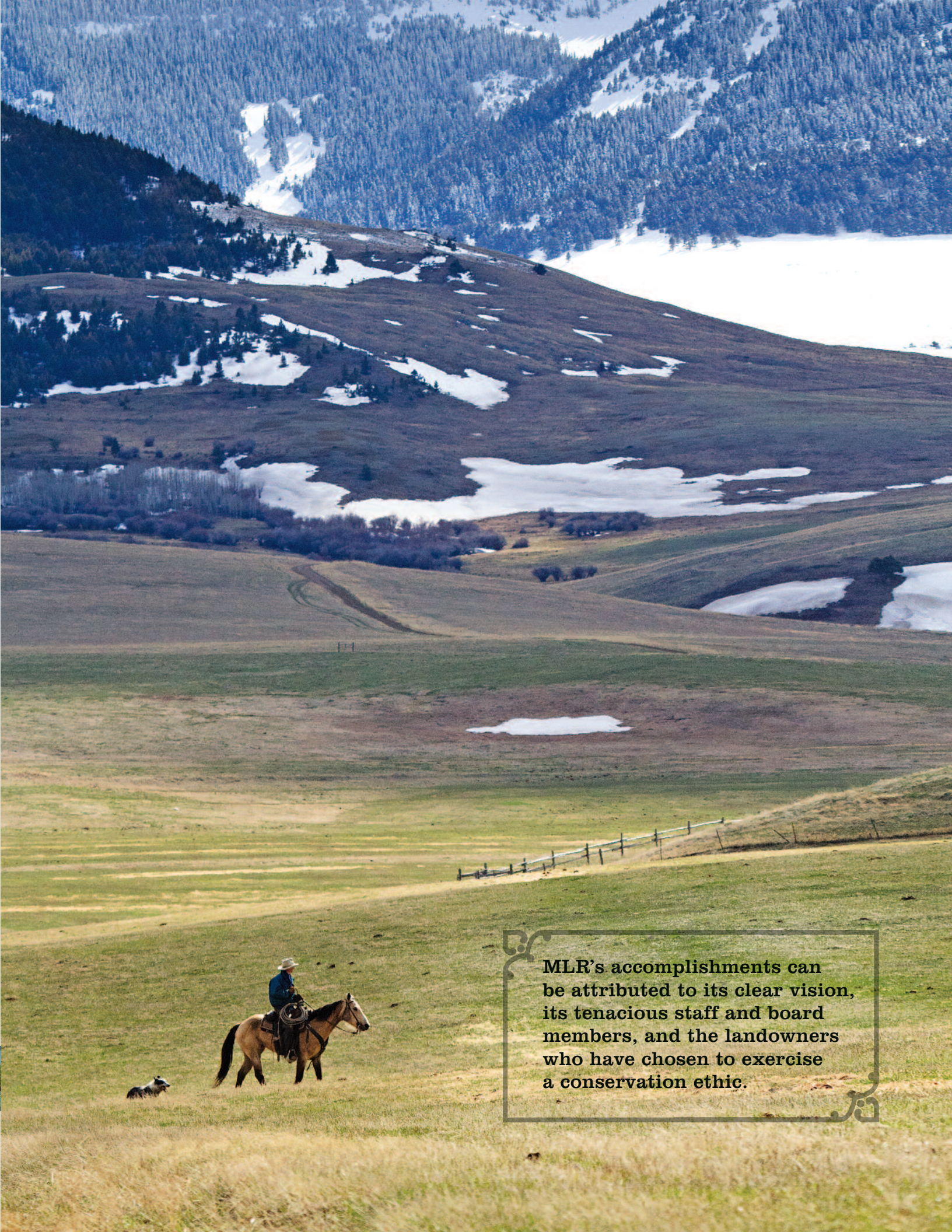
Alexis Bonagofsky

2017

**1,000,000 acres,
1,700 miles of streambank**

2018

The Land Trust Alliance gives MLR its President’s Award



MLR's accomplishments can be attributed to its clear vision, its tenacious staff and board members, and the landowners who have chosen to exercise a conservation ethic.

THE BERGS

Lennep, Montana

I pulled up to Rick and Gayle Berg's ranch house, turned off my car, and stepped out to a wiggling, happy ranch dog and a vista most people will never get to see: the Castle Mountains towering over the south fork of the Musselshell River. And it was quiet – country quiet. Winter hadn't taken hold yet, the sky was bright blue, and the sun was shining. It was a perfect day to sit down with Rick, Gayle, and their daughter Kari (pronounced Car-ee) at their ranch near Lennep, Montana – a little town between White Sulphur Springs and Harlowtown.

Like most multi-generational Montana ranching families, who they are is, in large part, based on where they are.

"This land is a part of us; it's who we are," said Rick.

They exude the kind of knowing that involves the senses, the memories, and the history of one family on one piece of land for well over a century. That certain knowledge and love of a place, as Wallace Stegner noted, comes from "working it in all weathers, making a living from it, suffering from its catastrophes, loving its mornings or evenings or hot noons, valuing it for the profound investment of labor and feeling that you, your parents, and grandparents, your all-but unknown ancestors have put into it."

When I ask Rick about his family's history in the valley, Kari laughs. She has an easy smile just like her dad.

"He's good at this," she says.

Rick leans back in his chair, wraps his hand around a hot cup of coffee, and tells me the story of their ancestors. Gayle, who is making fudge in the kitchen, occasionally chimes in with an anecdote or comment. Like most stories of Montana ranch families who have been able to



Rick Berg and daughter, Kari Marks

keep the land through four or five generations, it is a story of hard work, hardship, and commitment – of people who decided to stay and commit to a place.

"Just like the chickadee, a really Montana bird, they tough it out, they stay through the winter," Rick said.

Rick's great-grandfather, Jakob Berg, was a Norwegian immigrant who began working for the first settler in the valley, another Norwegian named Grandy, who had driven a bunch of sheep up from Idaho. Jakob also had a butcher shop in a nearby mining town called Castle Town. Eventually, he took up his own homestead in 1890 and started the Berg Brothers' Sheep Company with his brother. He essentially had the ranch put together as it is now by 1916.

And a beautiful ranch it is, ranging from 6,800 feet in elevation down to river bottom, where the south fork of the Musselshell River runs. The Bergs are proud of the fact that the land they



Alexis Bonogofsky

manage is able to support livestock, farming, and incredibly diverse and healthy wildlife populations of moose, elk, deer, pronghorn, black bears, Sandhill cranes, and dozens of other species.

“I knew I wanted to be a rancher from the age of 12. I was always going to come back here after college. It’s our sanctuary,” Kari says, “a place to raise our kids so they can grow up the way I did. It’s priceless.”

Everyone knows it’s not easy to keep a ranch intact and pass it down to the next generation. Rick notes that all his relations, through generations of his family, no matter if they were going to stay on the ranch or not, were committed to keeping the ranch intact.

“All of us were taught our ranch, this chunk of land that my great-grandfather and grandfather put together, was a sacred legacy,” Rick said.

“We have to take the long view of what our role is on this landscape. This place is our legacy.”

– Gayle Berg

“My great-grandfather carved it out and my grandfather fought his way through the depression to hang onto it.”

Rick first heard about conservation easements in 1983 when an easement came across his desk during his time on the county planning board.

“I thought it was an interesting tool. I had it in the back of my mind that I would do it all along,” he said. In 2006, the family came together and decided to do an easement with MLR.

Gayle emphasized the importance of planning and talking with the family while putting together an easement and transitioning the ranch to the next generation.

“Our family sat down at the kitchen table and talked it through. We have to take the long view of what our role is on this landscape. This place is our legacy, we said, let’s sit down and make this work.”

Kari and her husband Charlie took over the day-to-day operations of the ranch in 2012 and are the fifth generation to run the Berg ranch. After a three-year stint of working in Washington state after college, Kari and Charlie moved to the ranch. Kari is in charge of the cows and Charlie is in charge of the equipment and farming. They have two kids, Kellen and Claire, ages 11 and 9. Rick and Gayle also have another daughter, Solveig, who lives in Bigfork, Montana, with her family.

“We’ve always had a deep reverence for the land and our role in stewarding through to the next generation,” Kari said. “We take that role seriously.”

– Alexis Bonogofsky

THE GILMANS

Alder, Montana

When I asked Les Gilman about his ranch and what it means to him, he took a long pause before he answered.

“There is a verse in the Bible,” he said, ““Therefore, since we are surrounded by such a great cloud of witnesses, let us throw off everything that hinders, and let us run with perseverance the race marked out for us.””

Les went on to explain why this verse popped into his head in the context of ranching and living.

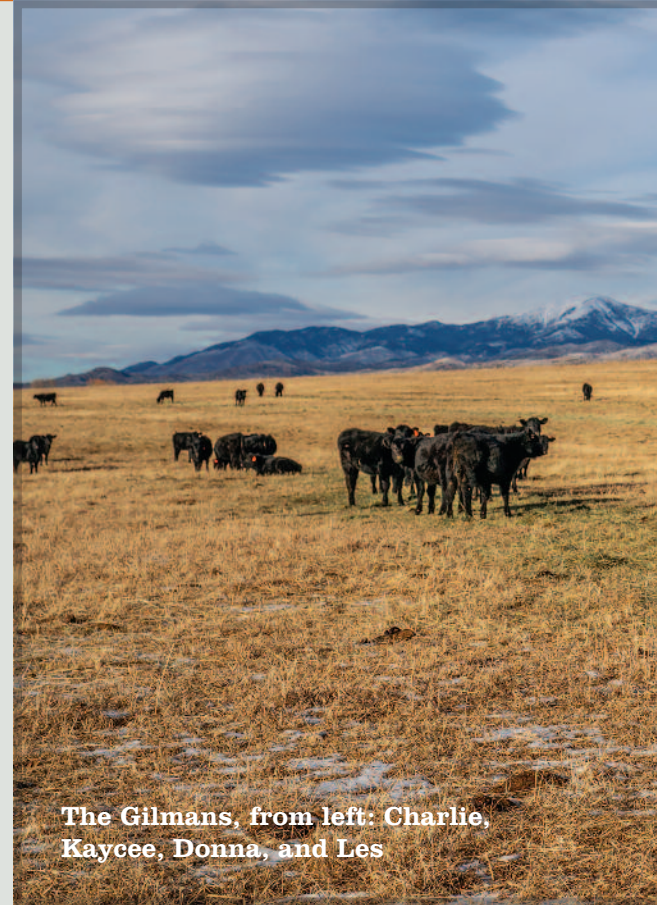
“Because our predecessors toiled and labored not only for their present needs, but also for what we currently have. They have left us a legacy and we stand in their presence with the responsibility to honor them by being good stewards today and planning for tomorrow.”

The past, the present, and the future are all very close at hand to the Gilmans. Les, his wife Donna, their son Charlie, and Charlie’s wife Kaycee, all sat down with me in early January to talk about their ranch in the Ruby Valley, their decision to place it in a conservation easement, and about the future of agricultural communities.

Les’ ancestors arrived in the Alder Gulch area shortly after the Gold Rush started in Virginia City in 1863. When I asked about their history there, Les joked, “It’s too much to tell!”

The evidence of that extensive history is a 250-page book written by Les’s father, Lowell Gilman, containing the history, memories, and photos of their family and the mining and agricultural activities of the community surrounding Alder Gulch.

One of his great-grandfathers, Isaac Harvey Gilman, homesteaded in the area very early on, although they aren’t sure of the exact year.



The Gilmans, from left: Charlie, Kaycee, Donna, and Les

However, he registered the brand they still use today, IH, in 1873, the first year that brands could be registered in the Montana territory. Numerous other great-grandfathers and grandmothers homesteaded in the area as well. The core of the ranch they now own has been in the family since 1909.

Charlie is the sixth generation of Gilmans to ranch on the land and the move toward a conservation easement with The Montana Land Reliance (MLR) was a natural outgrowth of generations of Gilmans working to conserve and protect their heritage. The easement was finalized in 2016.

Over the last 40 years they had seen good productive agricultural land subdivided and parceled out and wanted to make sure that their ranch maintained its integrity as a working landscape. When Les was growing up, everyone that lived on a ranch was a rancher. If the ranch was sold, it was to another rancher. Things are different now.



Alexis Bonogofsky

“The people before me have always been forward thinking and I want to continue that.”

– Charlie Gilman

ranch to be profitable and enjoyable. We want our kids to be able to ranch here if they choose to. The people before me have always been forward thinking and I want to continue that,” said Charlie.

Kaycee, who also came from a ranching family near Sheridan, Montana, said it best when I asked what each of them love most about their life on the ranch.

“Every day is bring your child to work day.” The entire family laughs when she says this. “Whether they like it or not,” Les chimes in to more laughter.

Donna also comes from an agricultural background and gets choked up when she remembers helping her dad on their farm and when she thinks about Charlie and Kaycee taking over the ranch.

“I’m so proud of these kids for all that they’ve done here and that they wanted to come back and ranch. It’s a tough go sometimes but they were willing to take it on. It gives me hope for our agricultural communities.”

At the end of the interview, we walk down the county road to find a pretty spot to take a picture. The January wind is whipping through the valley, the sky is bright blue, and the border collies are running out in front of us.

“You are here walking down the road or standing in a spot where very likely your great grandfather or grandfather was. It’s a solemn responsibility. Our role is to protect and preserve the legacy,” said Les. “The conservation easement makes a statement by the generations that create the easement. It is an irrefutable statement of intent that the property will not be divided up.”

–Alexis Bonogofsky

“Our family has a philosophical desire to protect, to keep the land intact that we’ve had such a long history and connection to. We knew we never wanted to see this place broken up into chunks,” said Les.

Charlie agreed. “I always knew I wanted to stay here and ranch and I never wanted to see our place subdivided now or in the future. A conservation easement is a valuable tool to keep these good agricultural lands viable,” said Charlie.

Charlie and Kaycee have four children: Coleman (16), Molly (12), Quinn (9), and Max (8).

One of the things that stood out to me about the Gilmans was their focus on making sure that the ranch stays viable into the future by intentional planning and keeping the lines of communication open.

“We all sat down and put together a vision and mission statement for our ranch. We want our

JEFF & BEA RATHS



When third-generation Montana cattle rancher Jeff Rath brought his new bride, Bea, home to his family's ranch in the sagebrush sea between Lavina and Roundup decades ago, she started to cry.

When you are used to trees, (Bea grew up in Minnesota), open sagebrush country can be, well, a little overwhelming at first.

"I can't open up a story about you two like that, can I?" I said to them as we all laughed.

But then, I thought, yes, I can. It's the perfect way to introduce the sagebrush ecosystem because it contains so much more than the eye can see at first glance. You have to get to know it a bit to appreciate what you are seeing. And with time and attention, its beauty and importance reveals itself.

"I could never imagine living anywhere else," Bea tells me, "This country gets in your blood."

Quite by accident I ended up at the Rath's kitchen table on a very big day.

Their conservation easement with The Montana Land Reliance (MLR) had just been finalized the day before. It was a long, almost five-year, fairly arduous easement process through the Montana Sage Grouse Habitat Conservation Program and Natural Resources Conservation Service (NRCS).

The importance of the easement can't be overstated. It will help keep the Rath's ranch intact and operating and help protect an iconic western bird, the Greater sage grouse.

It is because of this bird and the Rath's commitment to protecting its habitat, that they are receiving the 2018 William F. Long Conservation Award. MLR gives this award to landowners who have worked to permanently protect significant bird habitat.

When I asked about what it took to get it done, Jeff and Bea laugh.

"Well, let me put it this way. Kendall kinda feels like a son to us at this point," Jeff says, "he worked his butt off to get this thing done and through the gates. He understands us. He understands this way of life."

Jeff is referring to MLR Managing Director, Kendall Van Dyk, who, with the help of the MLR team, spent five years shepherding the easement through the bureaucracies of two government agencies and negotiating easement provisions.

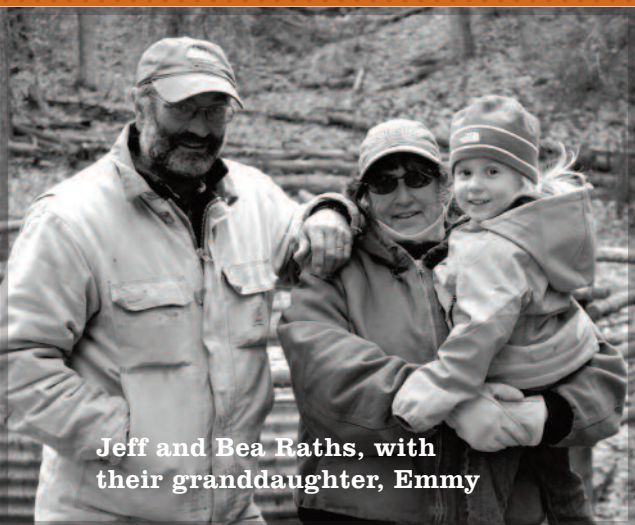
"Every so often in this business you work with a family where you build a real lasting and meaningful friendship." Kendall told me when I talked to him from his office in Helena.

But to understand what it took to accomplish the end goal, we have to take a couple steps back.

The Rath's ranch is visually stunning, but it is also ecologically stunning.

The sagebrush ecosystem, which extends across 11 western states and is the most widespread ecosystem type in the United States, can be deceiving to people who don't know what they are looking at. It provides vital habitat for over 350 wildlife species and is home to unique wildlife you won't find anywhere else, including the bird that started the Rath's journey down the road to securing a conservation easement on their property, the sage grouse.





Jeff and Bea Rath, with
their granddaughter, Emmy

“[The conservation easement] is a way to proactively address the threat to the sage grouse and provide voluntary incentives to conserve habitat while providing tools for the ranch to stay in family ownership.”

– Kendall Van Dyk, MLR Managing Director

“Well, it’s not the smartest bird I’ve ever come across,” said Jeff. “But they are fun to watch.”

The sage grouse thrives in big, unbroken, sagebrush-dominated landscapes, a habitat that is increasingly under threat from habitat fragmentation and conversion to cropland. Across the vast landmass of Montana, around 64% of the sage grouse’s breeding grounds are on private land. In 2014, the federal government estimated there were 508,000 Greater sage grouse in the U.S. and that the bird’s population is declining at about 2% per year. In 2017, Montana Fish, Wildlife and Parks (FWP) estimated there were 75,979 sage grouse in Montana.

The precipitous decline in the bird’s population made it a candidate to be listed as endangered under the Endangered Species Act (ESA). In 2015, concerned about its possible listing, something that could significantly affect ranching operations all around the state, the Montana Legislature passed the Montana Sage Grouse Stewardship Act, which created the Montana Sage Grouse Habitat Conservation Program.

It was through this program that the Rath, MLR, NRCS, and the State of Montana partnered to put 11,230 acres of the Rath property into a sage grouse conservation easement. The ranch is literally ground zero for the large bird’s habitat, and is home to one of the largest leks in the state.

A lek is an area where sage grouse congregate in the spring to go through their mating rituals.

Jeff and Bea consider themselves bird enthusiasts. They love watching all the different species making a home on their ranch. One of the highlights each year is when about a dozen research students with the State of Montana stay on their ranch during the spring and summer to study the sage grouse and the myriad of other birds that use the sagebrush ecosystem. “It’s great to have them around; they bring an energy to the place,” Jeff says.

This is the second easement under the Montana Sage Grouse Conservation program that MLR has completed.

“It’s a way to proactively address the threat to the sage grouse and provide voluntary incentives to conserve habitat while providing tools for the ranch to stay in family ownership,” said Van Dyk. “It shows that Montana can manage sensitive species without federal intervention.”

While much progress is being made to protect and conserve sage grouse habitat in the West through working groups and other government processes, the Rath easement may, in fact, be one of the most consequential actions taken by private individuals in the state of Montana to help the bird survive. And, the easement makes it so the Rath’s daughter and her husband can continue ranching on the place that Jeff’s grandfather homesteaded over 100 years ago.

“It’s good for the bird, it’s good for us. It’s a win-win.” said Jeff.

–Alexis Bonogofsky

FOREVER MONTANA SOCIETY

The Forever Montana Society exists to honor those who have left a lasting legacy of conservation, and to inspire others to do the same.

With perpetuity in mind, the Forever Montana Society is open to all consenting MLR easement donors and to those who have provided for MLR's mission in their overall financial and estate plans, sustaining agricultural lands, fish and wildlife habitat, and open space for generations to come. This list recognizes those who have agreed to be listed as Forever Montana Society members.

Learn more about the Forever Montana Society at mtlandreliance.org.

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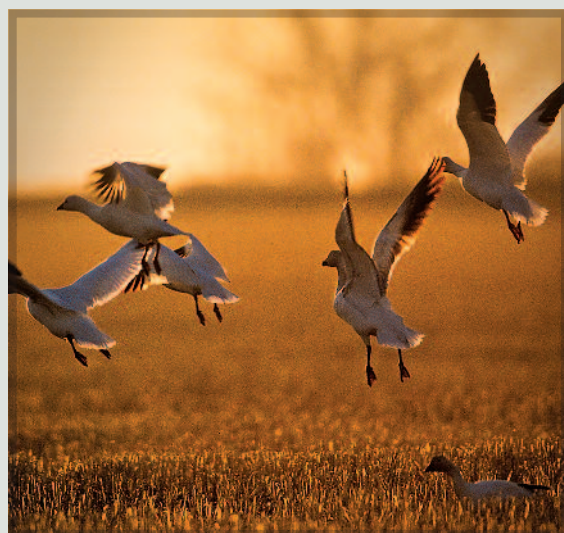
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 Paul, Ronald N.

Paulek, Mark & Jeanne Hamilton
 Pellegrini, Gary
 & Jennifer L. Holifield
 Perkins, David D.
 & Nancy MacKinnon
 Peterson, Gerald R.
 Pfeiffer, Steven B. & Kristin
 Reagan Pfeiffer
 Pfister, Ellen L.
 Phelps, Stuart
 & Kathleen McConkey
 Phillips, Leland H. & Sheila M.
 Phillips, Mary E.
 & Kathleen Tracy
 Phinney, Ben & Barbara
 Ploder, Steven E. & Lisa A.
 Poett, III, Henry W. & Cynthia S.
 Povich, Maurice R.
 & Connie Chung
 Proops, Jay D. & Mary K.
 Quinn, Jane & Bill
 Raible, Joe & Barbara
 Rasmuson, Judy A.
 Rasmussen, Robert S.
 Rauner, Bruce V. & Diana Mendley
 Reed, Glenn W. & Barbara W.
 Reed, Keith & Lisa
 Rehmann, Wilbur W.
 Retzler, Christopher J. & Karen H.
 Reynolds, Michael
 & Sara Stalnaker

Richards, Katharine K.
 & R. Courtney
 Richards, S. F. & Bruce William
 Ringling, Rock
 Ritchey, David
 Robbins, Gary L. & Cheryl J.
 Roberts, Donald & Carol
 Roe, Sandra B.
 Rogala, Kira
 Rokita, Rusty R. & Deborah A.
 Romatowski, Peter J.
 & Suzanne Bonner
 Romney, M. John & Jolene O.
 Roos, Kathie M.
 & Neal W. Blossom
 Rosenthal, Edward S. & Nancy G.
 Rostad, Phil
 Roth, Jane R.
 Rotticci, Edward G.
 Rubin, Robert E. & Judith O.
 Rudisill, McAndrew
 Rusmore, Barbara
 & Michael S. Clark
 Ryan, William B. F.
 Santa, John L. & Carol M.
 Scartozzi, Susan M. & Gregory T.
 Scharnberg, William
 Schaub, Joyce
 Schiltz, Donald & Sharon
 Schmidt, Gregory M.
 Schmidt, Jr., Dr. Chester W.

Scholz, Michael R. & Andrea
Schulein, Dr. Mark
& Dr. Genevieve Reid
Schwab, Charles R. & Helen O.
Seale, John Henry B. & Katherine
Seidel, Robert L. & Judith A.
Shaw, Dr. Alan H.
Shearer, Cindy
Sheffler, Kathleen
Sherman, Kevin J.
Shields, Mark
Shore, Stephen & Virginia
Short, Justin
Siderius, Charles E.
Siderius, Kenneth L.
Siderius, Richard W. & Joan E.
Silverman, Paul & Constance M.
Simmons, Fred & Olga Mohan
Simonds, Edward T.
& Margaret R.
Slaton, Bill & Ms. Kent Newton
Smeets, Erna
Smith, Farwell & Linda McMullen
Solaimani, Masood
Sollers, III, Joseph Sedwick
& Magge
Solomon, Peter & Susan
Sorensen, Jerald L. & Patti
Spear, Brian B. & Kathleen Kelly
Spinelli, Margaret A. & Felix J.
Springer, Larry A.
Stanley, Paul D. & Marolyn J.
Steiner, Ernest & Anna
Stephenson-Love, John D.
Stevenson, Carol S.
Stigen, LaNora
Stolp, Staci
Swindlehurst, Joseph T.
Tammany Tribus, Luann
Tatom, Kathy
Taylor, III, Bill & Susie
Taylor, Carson G.
& Deborah Cooper
Taylor, James H. & Valerie Anne
Walter C. & Janet D. Teagle, III
Family
Teller, John
Tempest, Jennifer Phelps
Thom, LeRoy & Jean
Thomas, Kris
Thomason, Rich & Sally
Thorell, Lennart M. & Carole C.
Tingle, Gene A. & Patricia F.
Townsend, Jerry
Tureck, Judy & Hugo
Twedt, Margaret A.
Van Dyke, Jed & Anne
Vermillion, Dale & Margaret
Vermillion, Dan
von Stade, Eleanor T.
Vranish, MD, Loren S.
& Sherry L.
Vroon, Bryan
Wallner, Fred & Mary Kay
Walton, Geoff & Sarah Lobeck
Weaver, David L.
Webb, Carl B. & Elizabeth
Wellenstein, Michael S. & Cori E.
Welles, Jeff & Maud I.
Wentz, MD, Anne Colston
& Dennis K. Wentz, MD
Weyerhaeuser, Robert M.
Wheat, Michael E. & Debra L.
Wheeler, Col. James S. & Jane
Whitney, Jay & Sandra

Wiese, Jessica L.
Wiley, T. & K. A.
Wilkins, Thomas J. & Betty L.
Wilkus, Mary Grace
Williams, Burton & Joan
Williams, Conrad "Duke"
Wilmerding, Jr., Henry A.
Wilson, III, Kendrick R.
& Ann Jackson
Wilson, Kendall & Vickie
Wilson, Penelope P.
Wilson, Suzanne
Wimberly, J. David
Wolcott, Doug & Nancy
Wortman, Kirk
Yackel, John P. & Eleanor R.
Zaideman, Robert & Julie
Zovickian, Stephen & Jan
Zuckerberg, Lloyd
& Charlotte Triefus
Roy J. Zuckerberg Family

FOUNDATIONS, COMPANIES, AND ORGANIZATIONS

AGL Foundation
Amazonsmile Foundation
American Public Land
Exchange Co., Inc.
B Bar Ranch
Carolyn E. Bailey Trust
W. H. Bass, Inc.
Belgrade News
Shelly Bermont Jewelry
Bibler Resources Company
Big Sky Resort Area District
Arthur M. Blank
Family Foundation
Boston Symphony Orchestra
Bozeman Area
Community Foundation
Bozeman Symphony
The Broadbent Family
Foundation, Inc.
BTR Holdings, LLC
Cadeau Foundation
Care & Quality Spraying –
John Huyser
CHS Mountain West Co-Op
Churchill Equipment Co., Inc.
The Cinnabar Foundation
Liz Claiborne & Arthur Ortenberg
Foundation
Clausen Law Group
Clearwater Montana
Properties, Inc.
Edward H. Clement Properties
Cloverly Road Designs, LLC
Cromley Messina Foundation
Cross Charitable Foundation, Inc.
The Coulter/Weeks
Charitable Foundation
Danhof Chevrolet, Inc.
Davis Family Charitable Trust
Denbury Green PL-MT LLC
Gary W. Dietrich Family
Foundation
Driggers Foundation
Eddy Foundation
Edward Jones – Jared Hauskins
ERA Landmark Real Estate
Fanwood Foundation
Faye's Café

First Cornerstone Foundation
Five K Family Fund
of the Chicago Community
Foundation
The Polley Family Foundation
Geraldine C. & Emory M. Ford
Foundation
Forestation, Inc.
Four Corners Saddlery
Gallatin History Museum
Gallatin River Guides –
Patrick & Brandy Straub
Gallatin River Task Force
Gates of the Mountains
Foundation
Granger Ranches,
Limited Partnership
Gulch Distillers
Haas Builders, LLC
The Horn Foundation
David & Janyce Hoyt Fund
Huppert, Swindlehurst
& Woodruff, PC
Hylton Family Charitable
Remainder
inFaith Community Fund of
inFaith Community Foundation
Intermountain Opera Bozeman
Jeffers Ranch, LLC
Robert Wood Johnson
1962 Charitable Trust
Kelly Ranch
J. C. Kennedy Foundation, Inc.
Knight Foundation, Inc.
La Chatelaine Chocolat Co.
Shane Lalani Center
Langlas & Associates, Inc.
Lechner & Stauffer, Inc.
Legal Seafoods
Lewis & Clark Expeditions, Inc.
Lewis & Clark Motels –
Lisa Sebens
Lillie's Garden – Laurie Blue

Little-Kittinger Foundation
Livingston Bar & Grille –
Chuck Peck
The Llewellyn Foundation
Lone Mountain Land
Company, LLC
Loon Lake Ranch
Lovett-Woodsum Foundation, Inc.
Manhattan Bank
McGuire Family Foundation
Sandra McManus Designs
Montague's Jewelers, LLC
Montana Association
of Land Trusts
Montana Chamber Music Society
Montana Planks
Montana Quarterly
Montana State Employee
Charitable Giving
Moonlight Community Foundation
Morgan Stanley
Mortise and Tenon Woodworks
Mountain West Farm Bureau
Insurance – Ruey Barnett
Murray Hotel
The Nalen Foundation
National Fish and Wildlife
Foundation
Natural Resources
Conservation Service
Northwest Farm Credit Services
NorthWestern Energy
Norwell Fund
OBOZ Footwear
One Montana
Outlaw Partners
Patagonia.com
PGN Foundation
Pleiades Foundation
The Pocket Foundation
Pond Family Foundation Trust
RDO Equipment Co.
Real World Design

Red Hen Jams
Rocky Mountain Supply, Inc.
Rolffing Family Fund
at the Flathead
Community Foundation
Ruby Habitat Foundation
Sauce Food Truck & Catering
SBWK Principal Investment, LLC
The Schlinger Family Foundation
Soka PIIWA Foundation
Spanish Peaks
Community Foundation
The Stake Foundation
C. Stone Foundation
Stony Point Foundation
SW Montana Farm & Ranch
Brokers
Tapeats Fund
Terex
John & Carry Thacher
Family Fund
Tordik Wildlife Foundation
Tsiang, Judith A.,
Charitable Fund
Matthew A. & Susan B.
Weatherbie Foundation
James Wellington & Family
Gift Fund
Henry E. & Consuelo S. Wenger
Foundation, Inc.
Norman C. Wheeler & Associates
The Wildwood Foundation
Willie's Distillery, Inc.
Willinphila Foundation
The Wine Gallery
Wonderland Café & Lodge
Woodson Ranch
Yellowstone Club
Community Foundation
Yellowstone Development, LLC
Yellowstone Forever
Yellowstone Mountain Club



Anderson Leadbetter, Gail
Bailey, Carolyn E.
Brandborg, Stewart
Brenneman, Joe
Broadus, Evelyn
Budginas, Leon
Carroll, Emmitt
Closs, Virginia R.
Dana, Emma Joy
Deegan, Carol Beth
Hart, Doug
Herrick, John
Hudson, Gary E.
Joyce, John J.
Korpi, Jim

Natwick, Lee & Linnea
Ogden, Jr., William F.
Ringling, Paul
Roath, Mary Catherine "Kay"
Taylor, Jean
Taylor, Lucian
Tingle, Patricia F.
Turner, Loretta "Lorrie"
Van Dyke, Lynne L.
Wainwright, Nina
Walton, M.D., William H.
Wellington, William
Wheat, Jim & Ann
Williams, LaRee
Wood, Warren

THE MONTANA LAND RELIANCE

Thanks to the continued support of its generous donors, The Montana Land Reliance (MLR) had another banner year in 2018.

MLR's operations continue to be amazingly efficient, with expenditures for the year running under budget. Revenues for the year exceeded expenditures again this year—as they have for the past 34 years—resulting in a gain of \$204,092 in the General Fund.

MLR was able to make grants to the Montana Land Reliance Foundation (the Foundation) in the amount of \$177,939 in 2018. These grants allow for continued growth in the corpus of the Foundation's investment accounts.

MLR FOUNDATION

During 2018, the Montana Land Reliance Foundation* (the Foundation) strove to preserve its funds and ensure its investments could earn the income required to support The Montana Land Reliance's (MLR) conservation efforts, despite the roller coaster financial markets. In spite of the market challenges, the Foundation's investments generated \$1,323,400 of realized income (net of fees) and distributed the necessary funds to MLR for its operations. The Foundation provided \$230,541 to MLR from its Land Protection Fund to support stewardship and easement monitoring. Additionally, the Foundation granted \$172,930 to MLR for education and outreach work to enhance local support for private land conservation.

The Foundation Board strives to manage these investments in a conservative manner while maintaining compliance with investment policies. Total realized and unrealized investment earnings for 2018 were a net loss of \$1,124,300 (5%), but the Board was pleased to have kept our losses at this low level in such a volatile market. During 2018, the Foundation received \$1,508,390 from MLR as an asset transfer. This, netted with the negative investment results, allowed the Foundation to slightly increase its net assets by \$92,499 to over \$24,000,000, after reflecting grants to MLR and other expenses.

* a 509(a)(3) support organization to The Montana Land Reliance

2018 FINANCIAL REPORT

Income	\$ 1,584,000
Expenses	\$ 1,379,908

General Fund	\$ 1,544,448
Accounts Receivable/Payable	\$ 291,808
Land Acquisition Fund	\$ 2,416,448

Total Assets **\$ 4,252,703**
as of 12-31-18

The Foundation was pleased to welcome Lee Freeman to the Board in 2018. Lee, along with current Board members – Karen Kress, Doug Mitchell, Jerry Townsend, Phil Rostad, and I – are honored to serve and steward the

Foundation's investments to perpetuate MLR's mission of open-space conservation for many years to come.

– Kim Montag, President,
Montana Land Reliance Foundation

2018 FINANCIAL REPORT

Land Protection Fund	\$ 13,029,250
<i>The corpus is available to defend and protect land already under easement; income is used for stewardship projects, monitoring of easements, and completing easements for donors who cannot cover these costs.</i>	

Education & Outreach Fund	\$ 7,657,891
<i>Income finances conservation education and outreach to landowners and the public.</i>	

Conservation Fund	\$ 2,084,613
<i>A permanent, irrevocable endowment designed to accept gifts from individuals or direct gifts from corporations, partnerships, or estates.</i>	

MLR General Operating Fund	\$ 1,204,401
<i>Account used for day-to-day operations of MLR.</i>	

Traditions Fund	\$ 43,915
<i>A permanent, irrevocable endowment designed to accept planned gifts from individuals or direct gifts from corporations, partnerships, or estates.</i>	

Foundation Operating Fund	\$ 13,775
<i>Account used for day-to-day operations of the Foundation.</i>	

Total Assets **\$24,033,844**
as of 12-31-18

The Ruby Habitat Foundation* is dedicated to preserving and enhancing the natural resources and social and economic makeup of the Ruby Valley and southwestern Montana.

Stewardship of natural resources is one of the very important responsibilities you and I have been entrusted with while we are walking this earth. At the Ruby Habitat Foundation (RHF), we are continuing to focus on what good stewardship looks like.

I continue to be amazed and inspired at the new discoveries of how the different parts of the ecosystem work together to benefit the whole. An example that intrigued me is a study that found the insects that provide a critical food source for sage grouse chicks and other shrub and grassland dependent birds are 13% higher in number in managed versus idled rangelands. This is another example that wise stewardship is well-managed use, not non-use.

While the Woodson Ranch does not have rangeland, there are many examples of how even small areas of diverse habitat can benefit a much larger area. One in particular is the pollinator plant areas that were developed when Craig Woodson was still with us. Our time on this earth may not be long but what people leave behind can benefit generations of both humans and wildlife. Craig was an example we can all look up to in that regard.

Every once in a while a quote will catch my attention and make me contemplate the direction I am headed. Recently, a quote by Eric Hoffer (1898-1983) did just that, so I share it with you: "Learners inherit the earth; while the learned find themselves beautifully equipped to deal with a world that no longer exists."

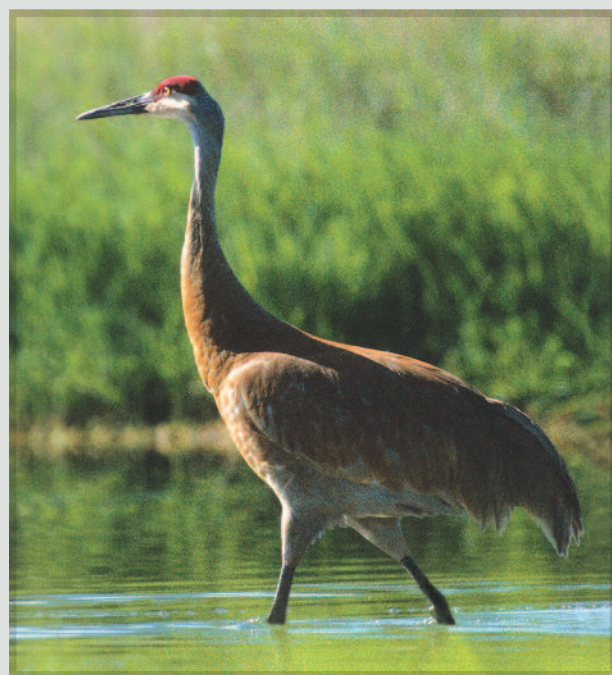
As I thought about this in relation to RHF, I feel we have a culture of being learners that was begun by Craig. Our education and outreach programs are touching more people each year. Over 1,800 guests visited the Woodson Ranch in 2018 and 24% of those came for science and education events.

One example is the Speaker Series event that RHF sponsored this past summer that was about fish in the Ruby River. The learners that attended not only heard about fish, but also about how agriculture works to make sure the flows in the river

are sufficient to provide good habitat for healthy fish populations and habitat for the many species of wildlife. We are providing the opportunity for others to also be learners as we continue to learn.

I want to thank each of you that support RHF, you are our partners.

*– Neil Barnosky, Chairman,
Ruby Habitat Foundation*



Randy Smith

BOARD OF DIRECTORS

Les Gilman, Executive Director

Group A, The Montana Land Reliance
George Olsen
Lois Delger-DeMars
Rock Ringling

Group B, Woodson Family
Martha Woodson
Leslie Vanderpool
Robin Mitts
Lisa Matthews

Group C, Ruby Valley Community
Neil Barnosky
Steve Wood
Bruce Peterson

**a 509(a)(3) support organization
to The Montana Land Reliance*

2018 FINANCIAL REPORT

Income	\$ 230,009
Expenses	\$ 215,448
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Rural Heritage & Open Lands Fund	\$ 78,290
Hill Education & Outreach Endowment	\$ 76,399
Woodson Ranch Endowment	\$ 6,084,823
General Fund	\$ 204,446
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Fixed Assets	
Equipment and Improvements	\$ 696,785
Land	\$ 7,783,237
Visitor Center Building	\$ 41,173
<hr/>	
Total Assets	\$14,965,153
<i>as of 12-31-18</i>	

DIRECTORS, STAFF, & TRUSTEES

BOARD OF DIRECTORS

George Olsen President Retired CPA Helena, MT	David Leuschen (6/18) Businessman Roscoe, MT/New York, NY
Phil Rostad Secretary-Treasurer Rancher White Sulphur Springs, MT	Chris Montague Business Owner Billings, MT
Rick Berg Rancher Martinsdale, MT	Jerry Sorenson Retired Land Use Planner Bigfork, MT
Allen Bjergo Agricultural Consultant/Farmer Corvallis, MT	Jerry Townsend Rancher Highwood, MT
Shane Colton Attorney Billings, MT	Judy Tureck Farmer/Rancher Coffee Creek, MT
Caroline Kurtz (6/18) Writer/Editor Missoula, MT	Dan Vermillion Business Owner Livingston, MT
	Ken Wilson, III (6/18) Businessman Emigrant, MT/New York, NY



Board of Directors, L to R: Shane Colton, Chris Montague, Caroline Kurtz, George Olsen, Rick Berg, Ken Wilson, III, Judy Tureck, Allen Bjergo, Jerry Townsend, Jerry Sorenson, David Leuschen, Phil Rostad, Dan Vermillion.

COUNCIL OF TRUSTEES

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William S. Broadbent Director, Institutional Equity Sales Barclays Capital Geyser, MT/New York, NY	Bob & Joanie Hall (6/18) Business Persons Livingston, MT/ New York, NY	Hamilton E. "Tony" James President & Chief Operating Officer, The Blackstone Group Twin Bridges, MT/ New York, NY	Thomas Patterson General Partner, Madrone Capital Partners McLeod, MT/Menlo Park, CA	William Taylor, III Partner, Zuckerman/Spaeder/ Goldstein/Taylor/Kolker Emigrant, MT/ Washington, DC
Millard & Mina Cox Ranchers Absarokee, MT	Sidney (Skip) Herman Managing Partner Bartlit Beck Herman Plenchar & Scott, LLP Big Timber, MT/Chicago, IL	David Joys Retired Vice Chairman Heidrick & Struggles Nye, MT/New York, NY	Jack Rand Chairman, Colorado Outward Bound School Denver, CO	Carl B. Webb Rancher/Banker Dallas, TX
John S. Dale Retired businessman Ovando, MT/Waubay, SD	Judy Hutchins Landowner Heron, MT	Karen Bates Kress Retired Nonprofit Executive Emigrant, MT/ Deerfield Beach, FL	D. Gideon Searle Managing Partner, The Serafin Group Naples, FL	Dr. Irving Weissman Director, Stanford Institute for Stem Cell Biology & Regenerative Medicine Hamilton, MT/ Palo Alto, CA
Mark F. Engebretson Downey Engebretson, Inc. Minneapolis, MN			Peter Solomon Chairman, Peter J. Solomon Co. New York, NY	

STAFF

Matt Bell GIS Coordinator/ Land Steward	Christian Dietrich General Counsel
Augusta "Gusty" Clarke Development Manager	Jay Erickson Managing Director
Kim Cook Administrative Assistant	Kathryn Kelly Greater Yellowstone Manager
Lois Delger-DeMars Managing Director	Rock Ringling Special Project Visionary
	Tom Schemm Digital Technician

Mark Schiltz Western Manager
Becky Stearns Bookkeeper
Will Trimbath Lands Manager
Kendall Van Dyk Managing Director
Jessie Wiese Southwest Manager

FUTURE MONTANA COMMITTEE

The Future Montana Committee (FMC) is comprised of young professionals across the country. Each member is a leader in his or her field, and together, represent a cross-section of Montana's future land use stakeholders. The Committee is dedicated to protecting Montana's open spaces and character for future generations. Members will advance MLR's conservation work and mission by expanding its network of landowners and donors, by advising staff and board in their respective areas of expertise, and by creating a community of young leaders around MLR's mission.

SEASONAL LAND STEWARDS

Terry Althaus	Pat Flanery	Tom Maxwell	Kori Anderson	Jonathan Fisher	Kelly Ramirez
Janet Bean-Dochwahl	Cathey Hardin	John Moorhouse	Hamilton, MT	New York, NY	Bozeman, MT
Louise Bruce	Ron Hvizdak	Jim Roscoe	Nick Bucklin	Barrett Kaiser	Aeric Reilly
Don Carroll	Jerry Iverson	Erin Shanahan	Mill Valley, CA	Billings, MT	Great Falls, MT
Andrea Darling	Skip Kowalski	Tom Wittinger	Ben Christensen	Brian McCurdy	Jon Selib
	Gayleen Malone		Bozeman, MT	Bozeman, MT	New York, NY
			Becky Edwards	Jess Peterson	
			Bozeman, MT	Custer, MT	

HOW YOU CAN HELP

There are many ways that families, individuals, foundations, corporations, and organizations can provide financial support for MLR's conservation work.

Because MLR is a non-profit corporation, contributions made to MLR are tax-deductible. Planned gifts are one way to make a meaningful impact on MLR's mission, but there are many ways that families, individuals, foundations, corporations, and organizations can provide financial support for MLR's conservation work.

Stock gifts are welcome and MLR has a very good process in place through its investment team at Morgan Stanley to assist donors to ensure a smooth, well-documented transaction.

As you plan your charitable giving, MLR can assist you in helping determine the most suitable option for your financial needs. Call us at 406-443-7027 or visit mtlandreliance.org for more information.

Your gift goes directly to MLR's work with private landowners to protect Montana's open spaces and working landscapes.


How to Give

- Cash contributions
- Securities, land, vehicles, and other property

Gift & Estate Planning

- Bequests
- Gift annuities
- Charitable trusts
- Life estate gifts
- Life insurance policies
- Beneficiary designations
- Retirement assets

MLR's tax identification number is 81-0369262.



**Staff can assist you in
determining the most suitable
option for your financial needs.**

**Call us at
406-443-7027
or visit
MTLANDRELIANCE.ORG**



Protecting Montana's
Open Landscapes

HELENA OFFICE

324 Fuller Avenue, Post Office Box 355
Helena, Montana 59624-0355
406-443-7027 • info@mtlandreliance.org

GLACIER/FLATHEAD OFFICE

470 Electric Avenue, Post Office Box 460
Bigfork, Montana 59911-0460
406-837-2178 • mlrnw@mtlandreliance.org

GREATER YELLOWSTONE OFFICE

Post Office Box 10843
Bozeman, Montana 59719-0843
406-579-5481 • mlrgy@mtlandreliance.org

BIG SKY OFFICE

35 Marketplace Street, Building #5, Post Office Box 161554
Big Sky, Montana 59716-1554
406-594-1570 • mlrsw@mtlandreliance.org

MTLANDRELIANCE.ORG

