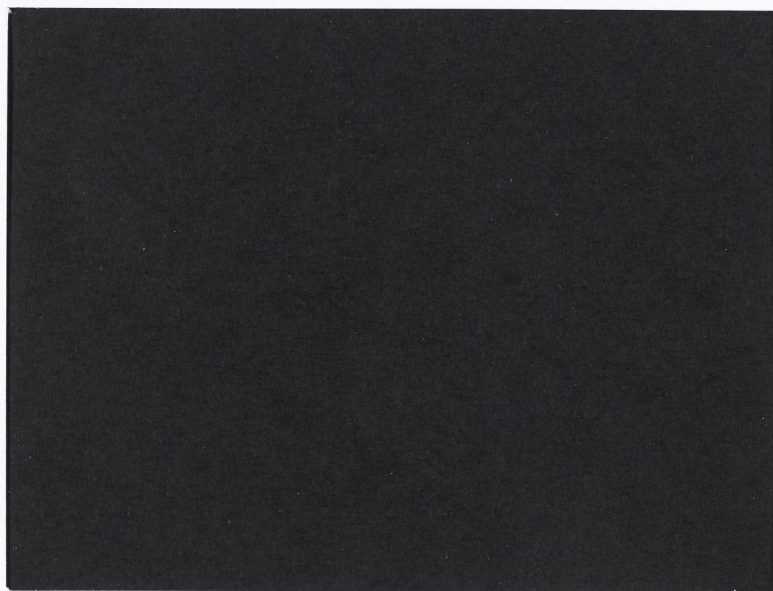




2009
**CONSERVATION
PLAN**

The Montana

LAND RELIANCE



Our Mission

The mission of The Montana Land Reliance (MLR) is to provide permanent protection for private lands that are significant for agricultural production, fish and wildlife habitat, and open space.

The immediate accomplishments of MLR's conservation work are measured in miles of stream banks and acres of land and habitat protected. The lasting benefits of MLR's work are the perpetuation of a lifestyle and economy that rely on responsibly managed private land and increasingly valuable Montana open spaces that will continue to nourish the spirit of future generations.

2009

CONSERVATION

PLAN

Who We Are

MLR is a private, nonprofit, nonpartisan organization comprised of experienced and entrepreneurial professional staff and advisors. Founded in 1981, MLR has evolved into one of the most effective private land conservation organizations in the nation with 810,031 acres of ecologically and historically important land protected through conservation easements.

Committed to conservation throughout Montana, MLR has offices in eastern, central, and western Montana. MLR is governed by a Board of Montana Directors and guided by a network of non-voting Advisory Board members from across the nation.

What We Do

MLR strives to provide permanent protection for ecologically and historically important private lands to enrich the positive relationship between these lands and Montana's diverse communities. Conservation of the lands that support agriculture, fish and wildlife resources, and open space is MLR's top priority.

As MLR's portfolio of protected land grows, staff increasingly direct their attention to the sustainability and stewardship of these special places. Management of MLR's staff and resources reflects the organization's commitment to sustaining conservation of lands protected by each of its 713 easements.

How We Do It

February 12, 2009

MLR works with Montana's private landowners both one-on-one and in neighborhood-based groups to provide long-term, legally sound conservation strategies to protect the economic and social elements of their land and their neighborhoods.



I. Mission

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Who We Are:

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As MLR's portfolio of protected land grows, staff increasingly direct their attention to the sustainability and stewardship of these special places. Management of MLR's staff and resources reflects the organization's commitment to sustaining conservation of lands protected by each of its 715 easements.

How We Do It:

MLR works with Montana's private landowners both one-on-one and in neighborhood-based groups to provide long-term, legally sound conservation strategies to protect the economic and natural elements of their land and their neighborhoods.

Conservation easements are the primary tools used by MLR to achieve these goals. A conservation easement is the legal glue that binds the property owner's good intentions and MLR's stewardship together in perpetuity.

Despite common elements precluding subdivision, commercial development, and other activities detrimental to soil, water, or wildlife habitat, each easement is tailored to the unique character of the land and the conservation goals of its owners. As a result, much of MLR's work is done around the kitchen table with family members.

II. Staff Core Values

A. Relationship oriented; landscapes, people, and wildlife.

- Long-term commitment
- Sense of place
- Trusted and community oriented
- Listening and understanding
- Learn from land and people

B. Innovative; "can do" spirit.

- Practical
- Efficient and effective
- Creative
- Focused and mission driven
- Customer service oriented

C. Empowered by our culture; "work to live"

- Passionate about private land conservation
- Appreciation for land
- Mutual trust and respect
- Confidence in ability of co-workers
- Work ethic to achieve mission
- Self-motivated
- Committed

III. Vision

Protecting Montana's Open Landscapes

IV. Long-Term Conservation Plan

As the organization approaches the realization of its current long-term goal; 1,000,000 acres of land and 1,500 miles of stream banks protected by 2010, it is important to look forward and develop a new plan for the future.

To develop a five-year plan (2008-2012), the following questions were examined:

- What does success look like five years from now?
- What does staff need to do to get there?

For the purpose of answering these questions, staff made two assumptions:

- The enhanced tax treatment of conservation easements will be made permanent. Staff has made the necessary time commitment to make permanent the increased tax incentives.
 - Correspondingly, lobbying and travel expenses will increase
 - Staff will seek support from key players in Congress
- The \$30 million Traditions Campaign will be successfully completed by mid-2013, based on the following:
 - Staff will launch the Campaign's initial silent phase in 2008
 - * *Traditions Campaign's silent phase successfully started in 2008*
 - The Traditions Campaign Coordinator will be hired in 2008 as a half-time position (\$30,000)
 - * *Traditions Campaign Coordinator hired in September 2008*
 - 2008 budget for travel, printing and postage (\$55,000)
 - * *2008 budget items under estimated amounts*
 - Staff will identify and mitigate potential opportunity costs
 - Staff will shuffle duties as needed to support Traditions Campaign
 - The capital campaign will be supported by Board members, Advisory Board members, and major donors
 - Staff will announce the campaign in 2010 and fully fund it by mid-2013

Five-Year Plan

What does success look like five years from now?

- The Montana Land Reliance will continue to be the pre-eminent land trust in Montana and the western United States based on its integrity, innovation, network of contacts, and financial health.

- The Montana Land Reliance will maintain its culture based on trust, project orientation, working landscapes, and a family-like atmosphere.
- The Montana Land Reliance will complete conservation easements on 350,000 additional acres protecting 350 additional miles of water.
 - * *31,600 acres of land and 68 miles of stream banks were protected in 2008*

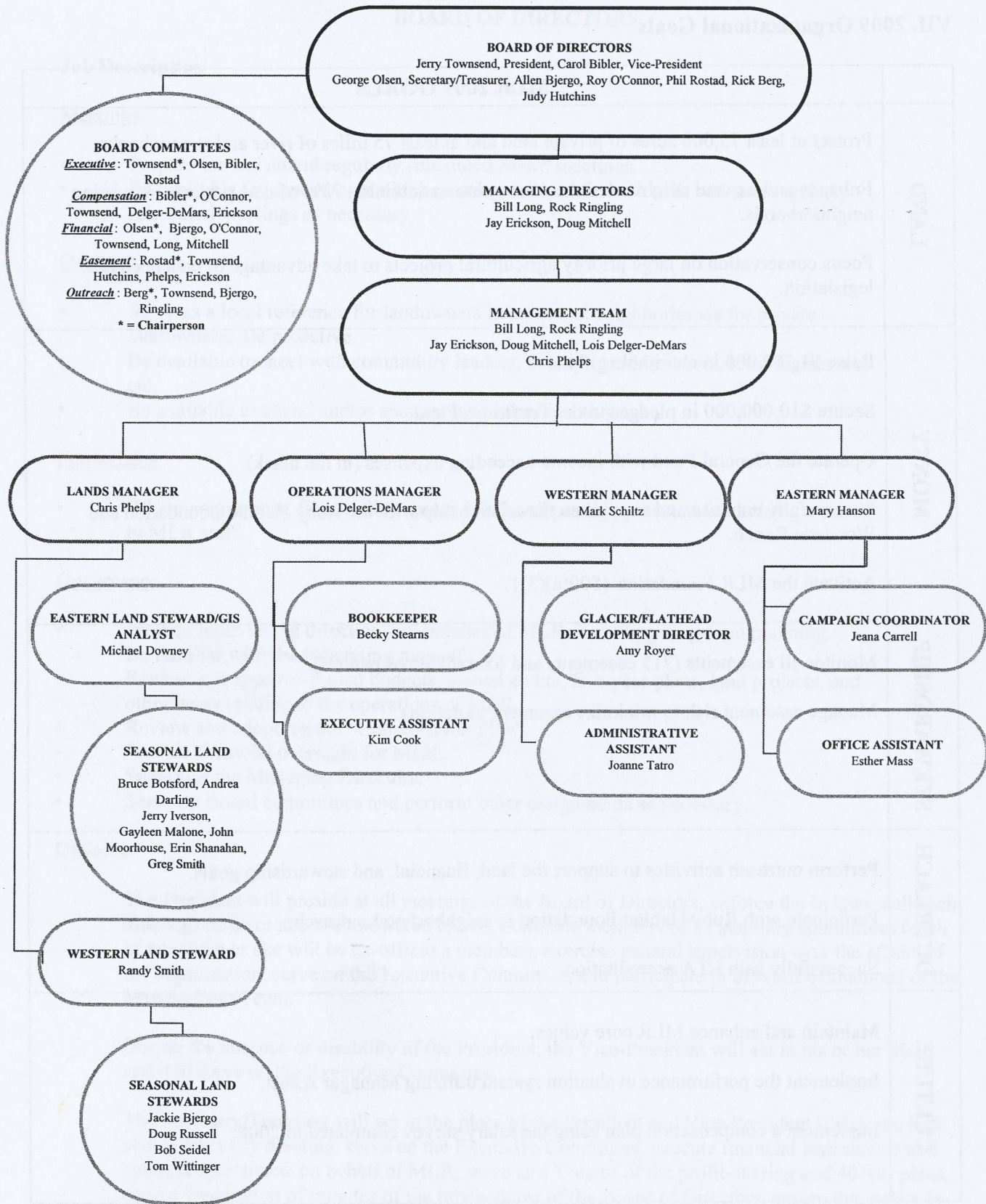
What does staff need to do to get there?

- Traditions Fund income will be successfully leveraged to protect open landscapes.
- Acreage protected will be high-quality, priority projects with larger average acres per easement and continued focus on agricultural landscapes.
 - * *Average acreage of an MLR easement in 2003 was 900 acres; in 2008 the average acreage was 1,506 acres*
- Groundwork will be laid for legislation to expand existing estate tax benefits or to exempt from estate tax qualifying agricultural lands protected with conservation easements.
- Staffing needs will be addressed and if necessary, additional office space secured.
 - Document staff to assist with the coordination of easements (2008)
 - * *Staff determined that a new position/staff member was not necessary in 2008*
 - Project staff to provide additional regional presence (2009)
 - Stewardship staff to reallocate supervisory duties (2010)

VI. Organizational Chart

(See following page)

DECISION MAKING/RESPONSIBILITY CHART



VII. 2009 Organizational Goals

MLR 2009 GOALS	
LAND	<p>Protect at least 75,000 acres of private land and at least 75 miles of river and stream banks.</p> <p>Enhance and expand neighborhood conservation maintaining 75% of new projects in existing neighborhoods.</p> <p>Focus conservation on large priority agricultural projects to take advantage of enhanced tax legislation.</p>
MONEY	<p>Raise \$1,700,000 in charitable gifts.</p> <p>Secure \$10,000,000 in pledges to the Traditions Fund.</p> <p>Operate the General Fund with income exceeding expenses (in the black).</p> <p>Successfully enhance and strengthen the relationship with the Ruby Habitat Foundation and Woodson Ranch.</p> <p>Activate the MLR Foundation {509(a)(3)}.</p>
STEWARDSHIP	<p>Monitor all easements (715 easements and 65 transferred parcels).</p> <p>Manage easement risk to minimize easement violations.</p>
OUTREACH	<p>Perform outreach activities to support the land, financial, and stewardship goals.</p> <p>Participate with Ruby Habitat Foundation in neighborhood outreach.</p> <p>Successfully gain LTA accreditation.</p>
CULTURE	<p>Maintain and enhance MLR core values.</p> <p>Implement the performance evaluation system utilizing Manager Assist.</p> <p>Implement a compensation plan using the salary survey completed in 2008.</p>

BOARD OF DIRECTORS

Job Description

Meetings

- Prepare for and attend regularly scheduled Board meetings.
- Be available for special/committee meetings and conference calls between regularly scheduled meetings as necessary.

Outreach

- Serve as a local reference for landowners in areas and neighborhoods for private landowners. Be proactive.
- Be available to meet with community leaders, county commissioners, local legislators, etc.
- Be available to attend and/or sponsor landowner meetings.

Fundraising

- Where appropriate, financially support MLR and provide potential fundraising contacts to MLR staff.

Governance

- Provide input on the direction and policies of MLR, including long-term planning. Be familiar with the "operating manual".
- Review and approve annual budgets, annual audits, five-year plans, land projects, and other items relative to the operations of MLR.
- Review and adopt annual "Conservation Plan".
- Provide financial oversight for MLR.
- Supervise the Managing Directors.
- Serve on Board committees and perform other assignments as necessary.

Officers

The President will preside at all meetings of the Board of Directors, enforce the bylaws, call such meetings as he or she is empowered to call, nominate members of all standing committees (each of which he or she will be ex-officio a member), exercise general supervision over the affairs of the organization, serve on the Executive Committee, and participate in the staff evaluations of the Management Team.

During the absence or disability of the President, the Vice-President will act in his or her place and will serve on the Executive Committee.

The Secretary/Treasurer will act in the place of the President and Vice-President if they are both absent from any meeting, serve on the Executive Committee, execute financial instruments and contract agreements on behalf of MLR, serve as a Trustee of the profit-sharing and 401(k) plans, ensure preparation of minutes of the proceedings of the Board of Directors, ensure that notice is properly given of meetings of the Board, and conduct such correspondence as may be required.

The Secretary/Treasurer will also, under the general supervision of the Board of Directors, oversee books of accounts and at least annually submit or require to be submitted to the Board of Directors the reports of CPAs and such other reports as are necessary to show the financial condition of the organization.

Committee Structure

Executive Committee

Mission Statement: The purpose of the Executive Committee is to provide oversight of MLR's Managing Directors and Board of Directors' committees. It also performs liaison functions between the Board and the staff, and serves as a "rapid response" committee that can provide guidance on situations that require immediate resolution when it is not practical to confer with the entire Board.

The Executive Committee shall also serve as the Nominating Committee of MLR's Board of Directors and is responsible for the assessment of the qualifications of proposed new Board members.

Operating Rules: The Executive Committee will consist of the Board President, Vice-President, Secretary/Treasurer, and one at-large Board member that is selected by the Board. The committee will call on one or more Managing Directors as needed to assist. The Executive Committee will meet as needed.

Work Plan: On an ongoing basis, the Executive Committee will continue to address Board/staff relationship issues, and provide oversight and guidance consistent with the Mission Statement above.

A specific issue that the Executive Committee will address this year is planning for the succession of Managing Directors, with a view toward Bill Long's retirement.

The committee will:

- 1) Ratify any actions taken at the next regularly scheduled Board meeting.
- 2) Disclose their actions (where appropriate). (There could be some confidentiality issues that arise where full disclosure is not appropriate.)
- 3) Keep minutes of all committee meetings and submit them to the main office in Helena for filing purposes.

Compensation/Evaluation Committee

Mission Statement: The mission of the Compensation and Evaluation Committee is to:

- 1) Make timely and informed recommendations to the Board of Directors concerning appropriate salaries, benefits, raises, and gifts for MLR staff;
- 2) Regularly evaluate the performance of MLR's Managing Directors and use the evaluations in making compensation, advancement, or disciplinary recommendations regarding the Managing Directors to the Board;
- 3) Ensure that an effective succession program is in place for MLR staff, keeping the Board advised of progress and concerns regarding the program; and,

The Compensation/Evaluation Committee will perform other tasks as may be delegated to it by the Board.

Operating Rules: The Compensation/Evaluation Committee consists of four members of the Board and two MLR staff members. It will confer as needed to achieve the goals set forth in the Mission Statement. At a minimum, the Committee will confer in the fourth quarter of each year concerning proposed staff compensation for the following year, and annually (typically in the first quarter of each year) to undertake performance evaluations of the Managing Directors. To the greatest extent practical, all committee members will be given an opportunity to participate in the decision-making process for the Committee.

Work Plan: The following key tasks will be undertaken by the Compensation/Evaluation Committee:

- 1) Develop an effective and workable evaluation process to assist with advancement and compensation decisions for MLR's Managing Directors.
- 2) Evaluate the results of the TREC salary survey that is expected in October 2008.

The committee will:

- 1) Ratify any actions taken at the next regularly scheduled Board meeting.
- 2) Disclose their actions (where appropriate). (There could be some confidentiality issues that arise where full disclosure is not appropriate.)
- 3) Keep minutes of all committee meetings and submit them to the main office in Helena for filing purposes.

Financial/Audit Committee

Mission Statement: The Financial/Audit Committee will provide oversight of the financial records, reporting and assets of MLR.

Operating Rules: The Financial/Audit Committee consists of four members of the Board and one MLR staff member. Majority rules. Each meeting will have a pre-set agenda and time frame.

Work Plan: The following tasks will be undertaken by the Financial/Audit Committee:

- 1) Meet three times – January, July/August, and November.
- 2) Review draft budget for the upcoming year at October/November Committee meeting.
- 3) Conduct a performance review of investments in January and July/August.
- 4) Retain CPA(s) to conduct MLR annual audits.
- 5) Determine the data and reports necessary for the functioning of the Committee, including Board requests for financial data in different formats.

The committee will:

- 1) Ratify any actions taken at the next regularly scheduled Board meeting.
- 2) Disclose their actions (where appropriate). (There could be some confidentiality issues that arise where full disclosure is not appropriate.)
- 3) Keep minutes of all committee meetings and submit them to the main office in Helena for filing purposes.

Outreach/Legislation Committee

Mission Statement: The Outreach/Legislation Committee is to steward MLR toward positive outcomes for private land conservation in the Montana Legislature and federal branches of the U.S. Government in coordination with private landowners across Montana, with an emphasis on agricultural producers. In addition, the Committee will develop outreach to landowners and potential funders of MLR's activities.

Operating Rules: The Outreach/Legislation Committee consists of three members of the Board and one MLR staff member. Committee members will work with the Board of Directors and MLR staff to develop a work plan for each calendar year. The work plan will include specific outreach activities to be undertaken by MLR Board and staff and development of the outreach budget to be submitted on October 1st of each year. In addition to outreach initiatives, the Committee will identify specific legislative threats to private land conservation in Montana and at the national level and propose proactive legislation that will further the opportunities for private land conservation for agricultural producers. The Committee will evaluate and propose outreach activities to promote a sound financial funding base for MLR.

Work Plan: Tasks to be undertaken by the Outreach/Legislative Committee include:

- 1) Identify and establish a budget for existing outreach and plan for new and needed outreach to elected officials, agricultural producers, private landowners, and funders.
- 2) Review and report on status of current and proposed legislative initiatives at the state and federal levels.
- 3) Establish legislative priorities and threats at state and federal levels.
- 4) Establish education program for private land conservation for Montana with an emphasis on Eastern Montana.
- 5) Review and make recommendations for MLR's annual report, newsletters, brochures, and other outreach materials.
- 6) Identify local outreach opportunities for Board and staff to spread the word about private land conservation.

The committee will:

- 1) Ratify any actions taken at the next regularly scheduled Board meeting.
- 2) Disclose their actions (where appropriate). (There could be some confidentiality issues that arise where full disclosure is not appropriate.)
- 3) Keep minutes of all committee meetings and submit them to the main office in Helena for filing purposes.

Easement/Stewardship Committee

Mission Statement: The purpose of the Easement/Stewardship Committee is to review as needed, staff's recommendations to the Board concerning:

- 1) New conservation easement projects;
- 2) Easement amendments;
- 3) Easement violations;
- 4) Stewardship/monitoring issues;
- 5) Easement acquisition proposals.

Operating Rule: The Easement/Stewardship Committee consists of three Members of the Board and two MLR staff members. Chairperson runs Committee meetings/conference calls or designates a replacement. All Committee members have equal input and the Committee tries to reach consensus on decisions brought before it.

Work Plan: Tasks to be undertaken by the Easement/Stewardship Committee include:

- 1) Review, suggest updates to, and ensure that easement acceptance and selection criteria are consistently applied;
- 2) Enhance Board efficiency in review of select easement projects;
- 3) Review staff write-ups, discuss, and make recommendations to the Board on select easement projects;
- 4) Review staff proposals, discuss, and make recommendations to the Board on select easement violations or easement interpretation concerns;
- 5) Review staff recommendations regarding easement stewardship/monitoring policy, function, and implementation;
- 6) Review staff recommendations regarding easement acquisition proposals.

The committee will:

- 1) Ratify any actions taken at the next regularly scheduled Board meeting.
- 2) Disclose their actions (where appropriate). (There could be some confidentiality issues that arise where full disclosure is not appropriate.)
- 3) Keep minutes of all committee meetings and submit them to the main office in Helena for filing purposes.

Employee Job Descriptions and 2009 Work Plans

The purpose of the Employee Job Descriptions Committee is to review and update job descriptions for all positions in the County of Santa Clara. The committee will meet on a regular basis to discuss and recommend changes to the County's job descriptions. The committee will also be responsible for reviewing and recommending changes to the County's job descriptions. The committee will meet on a regular basis to discuss and recommend changes to the County's job descriptions. The committee will also be responsible for reviewing and recommending changes to the County's job descriptions.

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CAMPAIGN COORDINATOR – Jeana Carrell

Job Responsibilities

Administration

- Type, generate, and edit Traditions Fund correspondence (hand written/computer generated drafts to final). Responsible for proofreading and editing of Traditions Fund documents for grammatical/spelling accuracy, readability, appearance, and accuracy of facts presented.
- Coordinate Traditions Fund meetings. Develop meeting agenda with input from fundraising staff. Create, update, and edit Traditions Fund documents and prepare meeting packets.
- Develop “Knowledge Management” system for campaign information using fundraising staff resources and the existing MLR database.
- Maintain donor records in MLR database with respect to Traditions Fund actions.
- Maintain a schedule of fundraiser tasks and provide reminders to ensure the completion of tasks.
- Complete respective portion of MLR’s Conservation Plan, which includes updating this job description and setting goals for the coming year.

Fundraising/Development Support

- Maintain calendars for fundraising “asks”.
- Contact donors to schedule “asks”, as needed. Schedule airline, hotel, rental car, and other reservations as appropriate for scheduled “asks”.
- Maximize efficiency of fundraising trips (i.e. whenever possible, schedule multiple “asks” per trip).
- Communicate, as needed, with co-workers and spouses of fundraisers to coordinate trips.
- Prepare appropriate information for “asks” and fundraising trips.
- Maintain open lines of communication with Operations Manager and Bookkeeper regarding pledges, gifts, and other campaign updates.
- Prepare and administer grants, including, but not limited to, challenge grants, as needed throughout the campaign. Responsible for proofreading and editing of documents for grammatical/spelling accuracy, readability, appearance, and accuracy of facts presented.
- Track all pledges, ensure proper acknowledgement of gifts, and report campaign progress to staff and Board on a regular basis.
- Assist fundraisers in general fundraising research and event planning.

Publication Support

- Manage the production of and maintain the inventory of Traditions Fund materials.
- Coordinate Traditions Fund campaign mailings.
- Draft update articles regarding the campaign for use in the newsletter and on the MLR website.

Miscellaneous

- Research, develop, and when necessary, present website opportunities for MLR support.
- Other duties as assigned.

	MLR 2009 GOAL	JEANA CARRELL EMPLOYEE WORK PLAN	ANTICIPATED COMPLETION DATE
LAND	Protect at least 75,000 acres of private land and at least 75 miles of river and stream banks.	Become familiar with easement process to expand organization knowledge.	On-going
	Enhance and expand neighborhood conservation maintaining 75% of new projects in existing neighborhoods.	Visit two MLR easement properties to reaffirm the scope and intent of MLR and Traditions Fund mission.	9/30/09
	Focus conservation on large priority agricultural projects to take advantage of enhanced tax legislation.		
MONEY	Raise \$1,700,000 in charitable gifts.	Facilitate the completion of \$10,000,000 in pledges to the Traditions Fund.	12/31/09
	Secure \$10,000,000 in pledges to the Traditions Fund.	Research donor history and necessary fundraising techniques to ensure campaign success.	On-going
	Operate the General Fund with income exceeding expenses (in the black).	Track all pledges, gifts, and acknowledgements pertaining to the Traditions Fund.	On-going
	Successfully enhance and strengthen the relationship with the Ruby Habitat Foundation and Woodson Ranch.	Operate Traditions Fund campaign within approved budget.	On-going
	Activate the MLR Foundation {509(a)(3)}.	Provide fundraisers with necessary training, research, and scheduling.	On-going
STEWARDSHIP	Monitor all easements (715 easements and 65 transferred parcels).		
	Manage easement risk to minimize easement violations.		
OUTREACH	Perform outreach activities to support the land, financial, and stewardship goals.	Create necessary Traditions Fund update articles and mailings.	On-going
	Participate with Ruby Habitat Foundation in neighborhood outreach.	Research and implement website fundraising opportunities.	On-going
	Successfully gain LTA accreditation.	Assist in coordination of new fundraising events and ideas.	On-going
		Attend one MLR outreach activity not related directly to Traditions Fund.	12/31/09

CULTURE	Maintain and enhance MLR core values.	Coordinate Traditions Fund meetings and ensure open communication and campaign success.	On-going
	Implement the performance evaluation system utilizing Manager Assist.	Observe one Traditions Fund "ask" for educational purposes.	8/31/09
		Continue research and self-education to learn more about organization and fundraising.	On-going
	Implement a compensation plan using the salary survey completed in 2008.	Attend and participate in MLR employee events including staff retreat and annual meeting.	On-going
		Attend educational webinar or seminar to enhance personal job skills and knowledge.	9/30/09

ADMINISTRATIVE ASSISTANT (HELENA) – Kim Cook

Job Responsibilities

Administration

- Type, generate, and edit general correspondence, project correspondence, and assist in the completion of funding proposals. Responsible for proofreading and editing of documents for grammatical/spelling accuracy, readability, appearance, and accuracy of facts presented.
- Answer telephone and receive visitors, directing them to the proper staff for action, answer general inquiries, and distribute informational materials.
- Track movement of MLR staff -- maintain schedule of staff absences and whereabouts and maintain telephone numbers to contact staff during absences with input and assistance from regional Assistants. Prepare and maintain up-to-date monthly calendars of all MLR staff schedules.
- Prepare monthly meeting agendas, collecting and editing any discussion materials and overseeing the distribution of packets to staff.
- Responsible for coordinating quarterly Board of Directors meetings (accommodations, lunch, agenda, editing and distribution of all relevant materials, and taking and transcribing meeting minutes).
- Complete respective portion of MLR's Conservation Plan, which includes updating this job description and setting goals for the coming year.

Fundraising/Outreach Support

- Research potential funders and generate fundraising lists for staff.
- Assist with fundraising events, i.e., fishing and hunting trips, as requested, which includes, but is not limited to, distributing brochures, invitations, and related documents, maintaining accurate invitation lists, making accommodation arrangements, tracking all rsvp's, and client reservations.
- Track all funding proposals for MLR (including proposals completed by regional offices) and maintain a tickler file on reports required for any grants received and notify appropriate staff of time lines.
- Assist with fundraising and outreach activities, i.e., distribution of annual reports, brochures, and fundraising letters, (keeping database accurate for mailings, coordinating and organizing mailings, organizing meetings materials), and fundraising trips (assist in coordinating out-of-state trips including setting up meetings and obtaining airline tickets).

Easement Support

- Create draft maps for new land project write ups and other special mapping projects using the GIS system.
- Assist Operations Manager with functions related to completion of easement documents (i.e., requests for title commitments, county review requests, editing of final drafts, legal descriptions, etc.).
- Assist MLR stewardship staff in preparing draft and final resource documentation reports with photos, maps, title pages, etc.
- Assist Operations and Lands manager in distribution of easement related documents (i.e., mineral reports, RDR reports from MLR staff and contractors, completed easement documents, etc.).

- Track all draft RDR's and maintain a tickler file on review deadlines, etc.
- Coordinate completion of easement certificates and distribute to appropriate MLR staff.
- Maintain Mergenthaler "permanent files", including maintenance of tracking sheets/database information, preparation of files for transfer, and placement of documents in permanent files.

Publication Support

- Coordinate major mailings for MLR (i.e., brochures, annual reports, newsletters, etc.). Additionally, coordinate the mailing of the newsletters and any other bulk mailings for MLR with Q Communications and Helena Industries.
- Assist with the production of and maintaining the inventory of MLR's brochures, outreach materials, etc.
- Assist in the generation of MLR's annual report, newsletter, brochures, etc., by working with contractors and consultants on time lines, tracking materials, etc.

Record Keeping

- Responsible for overall maintenance of MLR's organizational database with assistance from Operations Manager, Bookkeeper, and regional Assistants.
- Responsible for establishment and maintenance of organization's main files (funding, publicity, organizational, projects, and completed easements).

Miscellaneous

- Develop a full working knowledge of computer programs (i.e., MLR database, E-mail, word processing, and other relevant systems).
- Maintain and operate office equipment (computer, copier, fax machine, etc.).
- Perform special projects as may be requested.

	MLR 2009 GOAL	KIM COOK EMPLOYEE WORK PLAN	ANTICIPATED COMPLETION DATE
LAND	Protect at least 75,000 acres of private land and at least 75 miles of river and stream banks.	Assist Managing Directors, G/F Director, Western Manager, and Eastern Manager with land project write-ups and associated documents including maps.	On-going
	Enhance and expand neighborhood conservation maintaining 75% of new projects in existing neighborhoods.	Direct client calls and walk-ins to appropriate staff that can assist them with information on MLR and land conservation.	On-going
	Focus conservation on large priority agricultural projects to take advantage of enhanced tax legislation.	Provide professional and prompt assistance to current and future landowners, donors, etc., that need assistance.	On-going
		Assist Operations Manager with obtaining support documents for easements, i.e. warranty deeds, surveys, mortgages, etc. from county clerk and recorder's and title companies.	On-going
		Assist Operations Manager with easement documents, i.e., editing, mailing, preparation, and breakdown into permanent files.	On-going
		Ensure that easement documents and associated materials are recorded in database, scanned, and transferred to permanent off-site files (April/August).	On-going
MONEY	Raise \$1,700,000 in charitable gifts.	Mail out fundraising letters for the Managing Directors and maintain accurate mailing lists. Assist Managing Directors in preparing and tracking grant proposals.	On-going
	Secure \$10,000,000 in pledges to the Traditions Fund.	Research potential funders and generate fundraising lists for the Managing Directors.	On-going
	Operate the General Fund with income exceeding expenses (in the black).	Coordinate fishing calendar for MLR fishing trips to the Woodson Ranch and use of the Hill house with Ranch Resources.	On-going
	Successfully enhance and strengthen the relationship with the Ruby Habitat Foundation and Woodson Ranch.	Assist Managing Directors with their fundraising lists and travel arrangements for fundraising trips.	On-going
	Activate the MLR Foundation {509(a)(3)}.	Assist fundraising team to meet their fundraising goals by assisting with neighborhood meeting invitations, maintaining accurate mailing lists, and mapping land ownership.	On-going

STEWARDSHIP	<p>Monitor all easements (715 easements and 65 transferred parcels).</p> <p>Manage easement risk to minimize easement violations.</p>	<p>Assist stewardship staff with RDR's, i.e., letters to owners, copies of RDR's, and related documents, send documentation to contracted staff, monitoring letters, etc.</p>	On-going
OUTREACH	<p>Perform outreach activities to support the land, financial, and stewardship goals.</p>	<p>Assist Managing Directors with annual report, newsletters, and other yearly publications. Work with staff and contractors on the production and distribution of publications, letters, etc.</p>	On-going
	<p>Participate with Ruby Habitat Foundation in neighborhood outreach.</p>	<p>Responsible for overall maintenance of the database.</p>	On-going
	<p>Successfully gain LTA accreditation.</p>	<p>Mail information packets to potential clients and landowners as needed.</p>	On-going
CULTURE	<p>Maintain and enhance MLR core values.</p>	<p>Attend Board meetings and participate in staff retreats.</p>	On-going
	<p>Implement the performance evaluation system utilizing Manager Assist.</p>	<p>Work with Board and staff in organizing Board meetings, staff retreats, annual retreats, etc.</p>	On-going
	<p>Implement a compensation plan using the salary survey completed in 2008.</p>	<p>Assist MLR staff with special projects as assigned.</p>	On-going
		<p>Continue to improve on mapping projects and attend continuing education classes for GIS when available.</p>	On-going
		<p>Be dependable, respectful, and courteous to all staff and clients. Work to maintain a positive work place for others and to represent MLR in a professional manner.</p>	On-going

OPERATIONS MANAGER – Lois Delger-DeMars

Job Responsibilities

Administration

- Responsible for the general operation of MLR with regard to professionalism, accuracy of facts presented, and compliance with general procedures and policies.
- Responsible for overall personnel policy management, including legal compliance, updates, revisions, and other necessary changes.
- Serve on Compensation/Evaluation Committee.
- Supervise Bookkeeper, Helena Assistant, and any additional support staff.
- In conjunction with regional managers, hire and evaluate regional support staff.
- Handle administrative aspects of Devil's Kitchen Management Team: schedule; prepare minutes; coordinate mailings; prepare correspondence; and other activities as required.
- Perform and supervise special projects as requested by staff and Board of Directors.
- Complete respective portion of MLR's Conservation Plan, which includes updating this job description and setting goals for the coming year.

Conservation Easements

- From discussion/review of easement checklist at team meetings, prepare draft easement documents on MLR projects.
- Correspond with potential easement donors or their legal counsel to obtain warranty deeds, subordination information, mineral ownership information, etc.
- Correspond with title companies and county officials to obtain necessary information and review on easement projects.
- Contract for necessary services and supervise contractors on mineral remoteness reports.
- Assist Lands Manager with providing necessary information to contractors and administering contractual agreements for resource documentation reports.
- Responsible for ensuring the easement procedure is followed with regard to: easement review; accuracy; coordination of team meetings; coordination of draft/final documents; obtaining signatures; corresponding with county officials; distribution of final documents; filing; and finish work on projects.
- Set-up and maintain organizational tracking system showing the status of all projects, and upon completion of easements set-up and maintain tracking system for easement ownership, transfers, violations, amendment, and/or corrections, etc.
- In cooperation with Lands Manager, propose revisions to MLR's easement review process to staff and base easement document for review by counsel.
- Provide updates on project status and potential problem areas to staff and Board.

Accounting

- Oversee accounting functions of all MLR accounts and the MLR Foundation accounts.
- Assist with the posting and balancing of MLR's Retirement Fund and 401(k) Plan, including providing required information to staff in regard to elections, limitations, balances, etc.
- Responsible for the preparation and balancing of the annual tax return (990 form) combining all MLR fund balances, and income and expense records.

- Responsible for the preparation of the annual operating budget for the entire organization, including projections for year-end expenditures, for review and approval by staff and the Board of Directors.
- Responsible for planning, development, maintenance, budget compliance, and recommendations for MLR computer systems and software programs.

On-going	Oversee MLR's accounting procedures to ensure compliance with current accounting practices.	On-going	Oversee MLR's accounting procedures to ensure compliance with current accounting practices.	On-going	Oversee MLR's accounting procedures to ensure compliance with current accounting practices.
On-going	Monitor MLR expenditures to ensure they are within the annual budget.	On-going	Monitor MLR expenditures to ensure they are within the annual budget.	On-going	Monitor MLR expenditures to ensure they are within the annual budget.
On-going	Oversee MLR's financial statements and ensure they are accurate and timely.	On-going	Oversee MLR's financial statements and ensure they are accurate and timely.	On-going	Oversee MLR's financial statements and ensure they are accurate and timely.
On-going	Oversee MLR's investment and other financial matters.	On-going	Oversee MLR's investment and other financial matters.	On-going	Oversee MLR's investment and other financial matters.
On-going	Oversee the contract for annual reports, reports, resource documentation reports, etc. related to the treatment program.	On-going	Oversee the contract for annual reports, reports, resource documentation reports, etc. related to the treatment program.	On-going	Oversee the contract for annual reports, reports, resource documentation reports, etc. related to the treatment program.
On-going	Oversee contracting and administrative aspects of the MLR treatment program.	On-going	Oversee contracting and administrative aspects of the MLR treatment program.	On-going	Oversee contracting and administrative aspects of the MLR treatment program.

	MLR 2009 GOAL	LOIS DELGER-DEMARS EMPLOYEE WORK PLAN	ANTICIPATED COMPLETION DATE
LAND	Protect at least 75,000 acres of private land and at least 75 miles of river and stream banks.	Participate with the "team" in reviewing checklists with landowners and drafting workable and enforceable easement documents.	On-going
	Enhance and expand neighborhood conservation maintaining 75% of new projects in existing neighborhoods.	Ensure that the easement process is followed and that all steps are completed prior to any easement document being finalized and recorded.	On-going
	Focus conservation on large priority agricultural projects to take advantage of enhanced tax legislation.	Assist potential easement donors, their legal counsel, and others in working through the easement process (clarifying language, discussing the process, etc.).	On-going
		Work with stewardship staff to maintain up-to-date information on easement statistics (i.e., acreage per county; miles of stream bank per drainage, etc.).	On-going
		Maintain updated easement data in the organizational database and continue working on the generation of useful reports from that data.	On-going
		Over see the contracting and supervising of geologists preparing mineral remoteness reports.	On-going
MONEY	Raise \$1,700,000 in charitable gifts.	Oversee MLR's accounting procedures to ensure compliance with standard accounting practices.	On-going
	Secure \$10,000,000 in pledges to the Traditions Fund.	Monitor MLR expenditures to ensure they are within the annual budget.	On-going
	Operate the General Fund with income exceeding expenses (in the black).	Oversee MLR's cafeteria, retirement, and 401(k) plan administration.	On-going
	Successfully enhance and strengthen the relationship with the Ruby Habitat Foundation and Woodson Ranch.	Oversee the input of data into the organizational database that will enable the fundraisers to have better access to and information on donors' donation history.	On-going
	Activate the MLR Foundation {509(a)(3)}.	Assist RHF staff in tracking investments and other accounting practices.	On-going
		Oversee the contracts for mineral remoteness reports, resource documentation reports, etc., related to the easement process.	On-going
		Oversee accounting and administrative aspects of the MLR Foundation.	On-going

		Complete MLR's annual tax return (990) and balance the prior year's books with a favorable audit being conducted.	10/15/09
		Prepare the annual operating budget for review and approval by staff, Management Team, and Board.	11/15/09
STEWARDSHIP	Monitor all easements (715 easements and 65 transferred parcels).	Draft easement documents that are clear and enforceable to minimize violations and conflicts with present and future property owners.	On-going
	Manage easement risk to minimize easement violations.	Work with stewardship staff to maintain up-to-date information on easement properties (owners, managers, etc.) in the organizational database.	On-going
		Ensure that easement documents and associated materials are maintained in the working files; and, more importantly, in the permanent off-site files.	On-going
OUTREACH	Perform outreach activities to support the land, financial, and stewardship goals.	Work with county planners to keep MLR's information current in regard to growth policies and/or plans, contact information for easement reviews, and to educate them about conservation easements and MLR.	On-going
	Participate with Ruby Habitat Foundation in neighborhood outreach.	Continue participation in the Devil's Kitchen Management Team's efforts to manage wildlife numbers and other related management activities in that area of the state.	On-going
	Successfully gain LTA accreditation.	Work with staff and contractors on the production and distribution of publications (i.e., annual report, newsletters, etc.)	On-going
		Complete LTA accreditation process and obtain accreditation seal of approval.	8/1/09
CULTURE	Maintain and enhance MLR core values.	Work professionally and respectfully with co-workers and clients to generate a positive work environment.	On-going
	Implement the performance evaluation system utilizing Manager Assist.	Work as a member of the Management Team in organizational management.	On-going
	Implement a compensation plan using the salary survey completed in 2008.	Work with staff and Board to generate clear guidelines for staff/Board interactions; organizational work plans; etc.	On-going

		Supervise and evaluate the performance of Helena support staff; assist regional staff in the evaluation of regional support staff; and review compensation for MLR support staff.	On-going
		Through participation on the Management Team and with the Compensation Committee, implement an effective and productive evaluation process for MLR.	4/1/09
		Through participation on the Management Team and with the Compensation Committee, implement a compensation plan for MLR.	4/1/09

LAND STEWARD / GIS ANALYST - Michael Downey

Job Responsibilities

Monitoring

- Assist Lands Manager in the administration of MLR's easement monitoring program.
- Perform annual on-site monitoring visits on each assigned easement property.
- Maintain communications between MLR and easement landowners.
- Prepare necessary monitoring documentation and correspondence.
- Design and conduct special monitoring projects as necessary.
- Address easement violations and conduct necessary follow-up.

Stewardship

- Work with easement property owners to facilitate easement compliance.
- Prepare, as requested, resource documentation reports and necessary addendums for easement properties.
- Maintain easement files.
- Identify, initiate, and manage special natural resource projects as required.
- Facilitate contacts and collaboration between easement property owners, natural resource managers, and consultants as necessary.
- Compile easement habitat data.
- Keep current and inform landowners of advances in natural resource management (range, forest, and riparian management, noxious weed controls, etc.).

Information Technology

- Manage and execute MLR's mapping and GIS programs. Specific duties include the maintenance and development of GIS data, data analysis, map design, and production.
- Coordinate GIS data sharing and provide assistance as necessary to the Helena Assistant to ensure that GIS needs are adequately served within the organization.
- Create and maintain digital parcel data for all MLR easements and land projects, including project boundaries, aerial imagery, and habitat data.
- Verify easement boundaries on the basis of written legal descriptions set forth in easement documents.
- Produce accurate easement maps for land and stewardship staff, and outreach activities.
- Provide GIS data, topographic maps, and aerial imagery as necessary for MLR contractors.
- Maintain contacts with state and federal agency staff as necessary for the collection and dissemination of new and accurate GIS data.
- Remain current in technological innovations and software developments in the GIS field.

Administration

- Assist Lands Manager in developing annual stewardship budget.
- Supervise seasonal Land Stewards located east of the Continental Divide.
- Recruit and hire additional seasonal Land Stewards as necessary to monitor MLR's growing portfolio of conservation easements.
- Provide adequate orientation, training, and support for new and existing seasonal staff.

- Maintain and distribute a comprehensive Stewardship Manual that details the Land Steward's duties and responsibilities, and identifies and clarifies MLR's stewardship policies and guidelines.
- Complete respective portion of MLR's Conservation Plan, which includes updating this job description and setting goals for the coming year.

Public Education and Outreach

- Prepare articles for newsletters and reports as required.
- Represent MLR at various natural resource management groups in meetings and conferences.

	MLR 2009 GOAL	MICHAEL DOWNEY EMPLOYEE WORK PLAN	ANTICIPATED COMPLETION DATE
LAND	Protect at least 75,000 acres of private land and at least 75 miles of river and stream banks.	Provide mapping support to land staff for new easements projects. Create a verified map, aerial imagery, and exhibits as necessary for all approved easement projects.	On-going
	Enhance and expand neighborhood conservation maintaining 75% of new projects in existing neighborhoods.	Provide project staff with contacts for new easement projects.	On-going
	Focus conservation on large priority agricultural projects to take advantage of enhanced tax legislation.	Provide support to staff and configure GIS applications to enable expanded GIS support by additional staff.	On-going
		Provide MLR contractors with mapping and data support for new easement projects.	On-going
		Compile easement habitat data and other easement quantitative data.	On-going
MONEY	Raise \$1,700,000 in charitable gifts.	Assist Lands Manager in developing the annual stewardship budget and work plan.	11/15/09
	Secure \$10,000,000 in pledges to the Traditions Fund.	Educate landowners and the public about the work MLR has done. Explain the tools MLR has or hopes to have in the future (Traditions Fund, tax incentives bill, etc.).	On-going
	Operate the General Fund with income exceeding expenses (in the black).	Carry out monitoring and stewardship assessments in an efficient, cost-effective manner.	On-going
	Successfully enhance and strengthen the relationship with the Ruby Habitat Foundation and Woodson Ranch.		
	Activate the MLR Foundation {509(a)(3)}.		
STEWARDSHIP	Monitor all easements (715 easements and 65 transferred parcels).	Monitor 60 easements and oversee monitoring of 341 additional easements by 8 seasonal Land Stewards.	12/15/09
	Manage easement risk to minimize easement violations.	Hire additional Land Steward(s) as necessary to complete monitoring workload. Provide adequate training and support for new seasonal Land Stewards and existing seasonal Land Stewards.	On-going
		Remain current in GIS technology to facilitate on-going maintenance of MLR's GIS program and database.	On-going
		Work with stewardship staff to identify and correct easement boundaries and map parcel transfers of existing easements.	On-going

OUTREACH	Perform outreach activities to support the land, financial, and stewardship goals.	Monitor and remain involved with the Rocky Mountain Front Weed Task Force to remain informed on activities and opportunities for landowners to better control invasive weeds.	On-going
	Participate with Ruby Habitat Foundation in neighborhood outreach.	Attend and present information at the Annual Land Trust Conference in Portland.	October
	Successfully gain LTA accreditation.	Create watershed and other map products as necessary for outreach activities.	On-going
		Monitor and participate in the Montana Wetlands Council and Wetlands Legacy.	On-going
		Represent the interests of MLR and the land trust community as a representative to the Lewis & Clark Open Lands Committee.	On-going
CULTURE	Maintain and enhance MLR core values.	Meet as a group and individually with seasonal Land Stewards to provide training and oversight.	On-going
	Implement the performance evaluation system utilizing Manager Assist.	Organize and facilitate the annual stewardship meeting.	3/4-5/09
	Implement a compensation plan using the salary survey completed in 2008.		

MANAGING DIRECTOR -- Jay Erickson

Job Responsibilities

Land Conservation

- See, recruit, and contact landowners who are potential conservation easement donors.
- Work directly with landowners in assembling all necessary legal documents and work with project team to draft conservation easements.
- Responsible for the completion of easement projects.
- Work to find conservation buyers for important properties suitable for MLR.

Fundraising

- Develop new and maintain and nurture existing fundraising contacts for raising funds for MLR.
- Annually raise funds necessary for the MLR budget.
- Work with other Managing Directors on special project fundraising.
- Work with Western Manager, Eastern Manager, and Glacier-Flathead Development Director to assist them in meeting their fundraising responsibilities.
- Actively pursue reimbursement of project related costs and contributions to the Land Protection Fund for all land projects.

Administration

- Actively participate in policy and procedure decisions with other Managing Directors. Serve as staff liaison to the Board of Directors.
- Undertake special administration projects as assigned by the Board of Directors or by agreement of Managing Directors.
- Supervise specific administrative aspects of MLR with other Managing Directors as assigned.
- Develop annual conservation plan and five-year operational plans with other staff and Board of Directors.

Public Education and Outreach

- Develop new and nurture existing joint venture conservation with private groups and public agencies.
- Work with the public regarding the importance of private land stewardship.
- Develop new and nurture existing outreach programs for targeted valley areas and watersheds.
- Provide MLR outreach to professional groups including attorneys, accountants, and financial planners.

	MLR 2009 GOAL	JAY ERICKSON EMPLOYEE WORK PLAN	ANTICIPATED COMPLETION DATE
LAND	Protect at least 75,000 acres of private land and at least 75 miles of river and stream banks.	Complete 5-7 conservation easements on 7,000-15,000 acres and protect 15 miles of river and stream bank.	12/31/09
	Enhance and expand neighborhood conservation maintaining 75% of new projects in existing neighborhoods.	Work with the Easement Committee regarding easement violations and other easement issues such as purchased easements.	On-going
	Focus conservation on large priority conservation and agricultural projects to take advantage of enhanced tax legislation.	Target conservation buyers for specific properties that become available.	On-going
		Work with staff to expand neighborhoods through conservation easements.	On-going
MONEY	Raise \$1,700,000 in charitable gifts.	Raise between \$275,000 and \$325,000 for MLR funds.	12/31/09
	Secure \$10,000,000 in pledges to the Traditions Fund.	Make trips to California, Boston, and Chicago to solicit funds for MLR.	On-going
		Work with other Managing Directors, and other fundraising staff to expand pool of funding for MLR.	On-going
	Operate the General Fund with income exceeding expenses (in the black).	Work with MLR Board and staff to ensure budget and financial priorities are met.	On-going
	Successfully enhance and strengthen the relationship with the Ruby Habitat Foundation and Woodson Ranch.	Raise \$3.0 million in pledges or donations toward MLR's Traditions Fund Capital Campaign working with other Managing Directors and MLR's Board of Directors.	12/31/09
		Continue to evaluate MLR's long-term financial needs with the Managing Directors and keep the Board informed of the vision.	On-going
	Activate the MLR Foundation {509(a)(3)}.	Assist MLR's new Managing Director, Doug Mitchell, to transition him to assume west coast fundraising responsibility.	On-going
		Work with retiring Managing Director, Bill Long, to assume his fundraising responsibility in Chicago, Milwaukee, and Boston.	4/30/09

STEWARDSHIP	Monitor all easements (715 easements and 65 transferred parcels).	Continue to review potential easement violations and review proposed amendments with Lands Manager and stewardship staff.	On-going
	Manage easement risk to minimize easement violations.	Work with Operations Manager and Lands Manager to draft enforceable conservation easements.	On-going
		Work with other Managing Directors and Management Team members on staff and contractor oversight and planning.	On-going
		Work with the Easement Committee on issues new to the Board of Directors.	On-going
OUTREACH	Perform outreach activities to support the land, financial, and stewardship goals.	Work with Ruby Habitat to raise money for that organization.	On-going
		Work with the Management Team to establish clear communication about the future direction of MLR and expectations of the Management Team.	On-going
	Participate with Ruby Habitat Foundation in neighborhood outreach.	Work with Board of Directors setting policy and programs for MLR.	On-going
		Work with Operations Manager as needed on accreditation.	12/31/09
	Successfully gain LTA accreditation.	Work with other MLR staff on outreach in the Gallatin, Big Hole, and Blackfoot valleys, as well as other areas of Montana.	On-going
		Continue to provide analysis of state and federal legislation and the potential impact to MLR.	On-going
		Continue to advise and steer MALT with Montana legislative issues and various policy decisions.	On-going
CULTURE	Maintain and enhance MLR core values.	Maintain a high level of trust between all staff members.	On-going
	Implement the performance evaluation system utilizing Manager Assist.	Implement a quality staff performance review program.	12/31/09
		Provide open line of information between Board and all staff members as the Board Liaison.	On-going
	Implement a compensation plan using the salary survey completed in 2008.	Implement a salary guideline for staff based on performance, longevity, and duties.	12/31/09

EASTERN MONTANA MANAGER - Mary Hanson

Job Responsibilities

Land Conservation

- See, recruit, and contact landowners who are potential conservation easement donors.
- Work directly with landowners in assembling all necessary legal documents and work with the project team to draft conservation easements.
- Oversee easement projects for Eastern Montana office.
- Work to find conservation buyers for important properties suitable for MLR easements.
- Problem-solve and assist Operations and Lands managers, and Land Stewards with issues and violations that arise on easements originating in the Eastern Montana office.

Fundraising

- Develop new and maintain and nurture existing fundraising contacts for raising funds for MLR.
- Annually raise funds necessary for the MLR budget.
- Work with Managing Directors on special project fundraising.
- Manage Traditions campaign.
- Actively pursue reimbursement for project related costs and contributions to the Land Protection Fund.

Public Education and Outreach

- Develop new and nurture existing joint venture conservation with private groups and public agencies.
- Maintain and update MLR website.
- Work with the public regarding the importance of private land conservation and stewardship.
- Prepare materials and represent MLR at trade shows and events where landowners are present.
- Develop outreach programs for targeted valley areas and watersheds.
- Develop and coordinate news releases, articles, and other public relations regarding MLR's activities in Eastern Montana.

Administration

- Undertake special administration projects as assigned by the Board of Directors or by agreement of Managing Directors.
- Oversee all aspects (personnel, budget, etc.) of the Eastern Montana office.
- Supervise Campaign Coordinator and Administrative Assistant.
- Coordinate with and update staff and Board on Eastern Montana operations.
- Complete respective portion of MLR's Conservation Plan, which includes updating this job description and setting goals for the coming year.

	MLR 2009 GOAL	MARY HANSON EMPLOYEE WORK PLAN	ANTICIPATED COMPLETION DATE
LAND	Protect at least 75,000 acres of private land and at least 75 miles of river and stream banks.	Complete 6-8 conservation easements on 12,000 acres.	12/31/09
	Enhance and expand neighborhood conservation maintaining 75% of new projects in existing neighborhoods.	Leverage easement completion with funds available from the Traditions Fund and ABRT.	On-going
	Focus conservation on large priority agricultural projects to take advantage of enhanced tax legislation.	Make strategic contacts for potential easements in Red Lodge and Lewistown areas as well as the "great white".	7/01/09
		Work with supervisor and Board to maintain priority list of owners of large working landscapes.	On-going
		Make initial contact with landowners to introduce MLR's tools.	On-going
MONEY	Raise \$1,700,000 in charitable gifts.	Raise \$100,000 charitable gifts through fundraising trips, hunting and fishing trips, mailings, and cultivation of new donors.	12/31/09
	Secure \$10,000,000 in pledges to the Traditions Fund.	Supervise Campaign Coordinator and actively participate to ensure successful Traditions outcomes.	On-going
	Operate the General Fund with income exceeding expenses (in the black).	Complete appropriate Traditions asks.	On-going
	Successfully enhance and strengthen the relationship with the Ruby Habitat Foundation and Woodson Ranch.	Operate Eastern Office within approved 2009 budget.	On-going
	Activate the MLR Foundation {509(a)(3)}.	Work with Board members and friends of MLR to increase funding base for Eastern Office.	On-going
STEWARDSHIP	Monitor all easements (715 easements and 65 transferred parcels).	Maintain good working relationships with seasonal Land Stewards and assist, when requested, with landowner interaction.	On-going
	Manage easement risk to minimize easement violations.	Educate easement donors regarding specific requirements and expectations during drafting process to minimize future problems.	On-going
		Work with the easement drafting team to draft enforceable easements.	On-going

OUTREACH	Perform outreach activities to support the land, financial, and stewardship goals.	Educate agricultural community through trade shows including MSGA and MCA mid-year and annual meetings, 4-H, FFA, Range Days, and the Governors' Range Tour.	12/31/09
	Participate with Ruby Habitat Foundation in neighborhood outreach.	Work with supervisor to develop targeted advertising campaign to enhance public perception of private land conservation.	6/30/09
	Successfully gain LTA accreditation.	Serve on appropriate committees and groups including the RRAC and Undaunted Stewardship.	On-going
CULTURE	Maintain and enhance MLR core values.	Attend and participate meaningfully in MLR meetings, including monthly, Board and annual meetings and staff retreat.	On-going
	Implement the performance evaluation system utilizing Manager Assist.	Provide leadership, training, and feedback to Esther Maas and Jeana Carrell to ensure job satisfaction.	On-going
	Implement a compensation plan using the salary survey completed in 2008.	Meet organizational deadlines to ensure timeliness of work and illustrate respect for co-workers.	On-going
		Prepare performance evaluation for Esther Maas and Jeana Carrell.	9/30/09

MANAGING DIRECTOR – Bill Long

Job Responsibilities

Land Conservation

- See, recruit, and contact landowners who are potential conservation easement donors.
- Work directly with landowners in assembling all necessary legal documents and work with the project team to draft conservation easements.
- Responsible for the completion of easement projects.
- Work to find conservation buyers for important properties suitable for MLR easements.

Fundraising

- Develop new and maintain and nurture existing fundraising contacts for raising funds for MLR.
- Annually raise funds necessary for the MLR budget.
- Work with other Managing Directors on special project fundraising.
- Work with Western Manager, Eastern Manager, and Glacier-Flathead Development Director to assist them in meeting their fundraising responsibilities.
- Actively pursue reimbursement of project related costs and contributions to the Land Protection Fund for all land projects.
- Develop and coordinate fundraising goals for MLR.

Financial Management

- Review, recommend, and monitor annual budgets.
- Work with investment professionals on investment and management of MLR's financial assets: General Fund, Land Protection Fund, Education and Outreach Fund, Land Acquisition Fund, Traditions Fund, Conservation Fund, Eastern Montana Fund, Glacier/Flathead Fund, and Retirement Fund.
- Act as staff liaison to MLR Board's Finance Committee.
- Analyze monthly financial statements and monitor income and expenses, and in consultation with the Operations Manager recommend modifications as necessary.

Administration

- Actively participate in policy and procedure decisions with other Managing Directors.
- Undertake special administration projects as assigned by the Board of Directors or by agreement of Managing Directors.
- Supervise specific administrative aspects of MLR with other Managing Directors as assigned.
- Develop annual conservation plan and five year operational plans with other staff and Board of Directors.

Public Education and Outreach

- Develop new joint venture conservation with private groups and public agencies.
- Work with the public regarding the importance of private land conservation.
- Develop new and nurture existing outreach programs for targeted valley areas and watersheds.
- Liaison with northwest land trusts and Heart of the Rockies.
- Moderator for Devil's Kitchen Management Team.

	MLR 2009 GOAL	BILL LONG EMPLOYEE WORK PLAN	ANTICIPATED COMPLETION DATE
LAND	Protect at least 75,000 acres of private land and at least 75 miles of river and stream banks.	Complete 2 conservation easements protecting 3,000 acres and two miles of river/stream bank.	4/1/09
	Enhance and expand neighborhood conservation maintaining 75% of new projects in existing neighborhoods.	Target conservation buyers for specific properties that are for sale.	4/01/09
	Focus conservation on large priority agricultural projects to take advantage of enhanced tax legislation.	Continue to target and contact agricultural ranch families regarding MLR and private land conservation.	4/01/09
		Continue to foster staff involvement and participation in project selection.	4/01/09
		Work with Operations Manager and Lands Manager to draft conservation easements that are enforceable into the future.	4/01/09
MONEY	Raise \$1,700,000 in charitable gifts.	Transition funding contacts to respective staff.	4/01/09
	Secure \$10,000,000 in pledges to the Traditions Fund.	Transition financial responsibilities to new Managing Director.	4/01/09
	Operate the General Fund with income exceeding expenses (in the black).	Raise \$5-10 million in commitments to the Traditions Fund.	4/01/09
	Successfully enhance and strengthen the relationship with the Ruby Habitat Foundation and Woodson Ranch.	Work with Operations Manager and Bookkeeper to assure that actual expenses do not exceed budgeted amount.	4/01/09
	Activate the MLR Foundation {509(a)(3)}.	Work with Morgan Stanley to continue to build and create the financial resources for the sustainability and growth of MLR.	4/01/09
		Work with the Financial Committee to ensure the financial health of MLR.	4/01/09
		Assist in the establishment and functioning of the MLR Foundation, including working with Morgan Stanley to build and create the financial resources for the sustainability and growth of MLR.	4/01/09
STEWARDSHIP	Monitor all easements (715 easements and 65 transferred parcels).	Continue to facilitate DKMT.	4/01/09
	Manage easement risk to minimize easement violations.	Work with the public regarding the importance of private land conservation and develop outreach programs for targeted watersheds.	4/01/09

OUTREACH	Perform outreach activities to support the land, financial, and stewardship goals.	Work with staff for successful completion of LTA accreditation process.	4/01/09
	Participate with Ruby Habitat Foundation in neighborhood outreach.	Contribute to the continuation of an open and trustworthy work environment.	4/01/09
	Successfully gain LTA accreditation.	Participate with staff on the implementation of personal evaluation system.	4/01/09
CULTURE	Maintain and enhance MLR core values.	Work with Management Team to develop and implement a compensation policy.	4/1/09
	Implement the performance evaluation system utilizing Manager Assist.		
	Implement a compensation plan using the salary survey completed in 2008.		

ADMINISTRATIVE ASSISTANT (EASTERN) – Esther Maas

Job Responsibilities

Administration

- Type, edit, copy, distribute, and file general correspondence, project correspondence, and assist in the completion and tracking of fundraising proposals. Responsible for proofreading and editing of documents for grammatical/spelling accuracy, readability, appearance, and accuracy of facts presented.
- Answer telephone and receive visitors, directing them to the proper staff for action, answering general inquiries, managing conservation easement requests, and distributing informational materials.
- Retrieve and distribute incoming mail and collect and deliver outgoing mail to the post office.
- Track movement of Eastern office staff – maintain schedule of staff absences and whereabouts and maintain telephone numbers to contact staff during absences.
- Responsible for supplying copies of required documents (i.e., funding proposals, publication distribution lists, project related correspondence, etc.) to Helena staff.
- Complete respective portion of MLR's Conservation Plan, which includes updating this job description and setting goals for the coming year.

Fundraising/Outreach Support

- Assist with fundraising events, as requested, which includes, but is not limited to, creating, producing, and distributing brochures, invitations, and related documents, maintaining accurate invitation lists, making accommodation arrangements, tracking rsvp's, and assisting in creating and maintaining event budgets.
- Assist with fundraising and outreach activities, i.e., distribution of annual reports, brochures, and fundraising letters (keeping database accurate for mailings, coordinating, creating, and organizing mailing of fundraising and general information letters, and organizing meetings), and fundraising trips (assist in coordinating out-of-state trips including setting up meetings and obtaining airline tickets).
- Responsible for Conservation Buyer Program that involves the collection, organization, and distribution of property listings for realtors and conservation buyers every six weeks.

Easement Support

- Assist with land project related tasks as requested, i.e., mapping, obtaining supporting documents, and preparing project write-ups.
- Assist stewardship staff in Eastern Montana with project related work, i.e., letters, copying, mailings.
- Coordinate completion of easement certificates with Helena Assistant. Frame certificates and track certificate distribution.

Record Keeping

- Responsible for establishment and maintenance of database for the Billings office and supplying updates to the Helena office for organizational database.

- Responsible for establishment and maintenance of Billings office's general (funding, publicity, and organizational) files.
- Administer petty cash fund, supplying Helena staff with appropriate receipts/documentation.

Miscellaneous

- Develop a full working knowledge of computer programs, i.e., database system, E-mail, word processing and other necessary systems.
- Computer maintenance, including back-ups and file management.
- Maintain inventory (ordering where appropriate) of office supplies and stationary products.
- Maintain and operate office equipment (computer, copies, fax, etc.)
- Perform special projects as may be requested.

	MLR 2009 GOAL	ESTHER MAAS EMPLOYEE WORK PLAN	ANTICIPATED COMPLETION DATE
LAND	Protect at least 75,000 acres of private land and at least 75 miles of river and stream banks.	Seek new easement projects by contacting new landowners and following up on leads.	On-going
	Enhance and expand neighborhood conservation maintaining 75% of new projects in existing neighborhoods.	Assist Eastern Manager with land project related tasks, i.e., mapping, updating neighborhood mailing lists, obtaining supporting documentation. Assist in completing project write-ups and easement drafting checklist forms, and continue education of land protection.	On-going
	Focus conservation on large priority agricultural projects to take advantage of enhanced tax legislation.	Responsible for Conservation Buyer Program. Collect, organize, and distribute property listings for realtors and conservation buyers.	Every six weeks
		Assist with the administration and distribution of easements, brochures, and any pertinent information needed for distribution.	On-going
MONEY	Raise \$1,700,000 in charitable gifts.	Research additional grants and funds with the guidance of Eastern Manager and Land Stewards.	On-going
	Secure \$10,000,000 in pledges to the Traditions Fund.	Assist with the acknowledgement and follow-up of grants, funds, and contributions.	On-going
	Operate the General Fund with income exceeding expenses (in the black).	Generate fundraising which includes coordinating, and organizing letters and maintaining accurate mailing list.	On-going
	Successfully enhance and strengthen the relationship with the Ruby Habitat Foundation and Woodson Ranch.	Coordinate fundraising trips for the Eastern Manager.	On-going
	Activate the MLR Foundation {509(a)(3)}.	Provide support for Traditions Fund fundraising.	On-going
		Assist with the spring Minneapolis/St. Paul fundraising gathering.	May 2009
STEWARDSHIP	Monitor all easements (715 easements and 65 transferred parcels).	Provide clerical support for Eastern Manager and Land Stewards and Seasonal Land Stewards as needed.	On-going
	Manage easement risk to minimize easement violations.		

OUTREACH	Perform outreach activities to support the land, financial, and stewardship goals.	Organize MLR's involvement in trade shows and events.	On-going
	Participate with Ruby Habitat Foundation in neighborhood outreach.	Assist in the expansion of agriculture outreach activities.	On-going
	Successfully gain LTA accreditation.		
CULTURE	Maintain and enhance MLR core values.	Attend and participate in annual staff retreat and annual meeting.	On-going
	Implement the performance evaluation system utilizing Manager Assist.	Continue educational classes and attend at least one training course to enhance administrative professional skills and become more knowledgeable of the organization.	On-going
	Implement a compensation plan using the salary survey completed in 2008.		

MANAGING DIRECTOR – Doug Mitchell

Job Responsibilities

Land Conservation

- See, recruit, and contact landowners who are potential conservation easement donors.
- Work directly with landowners in assembling all necessary legal documents and work with the project team to draft conservation easements.
- Responsible for the completion of easement projects.
- Work to find conservation buyers for important properties suitable for MLR easements.

Fundraising

- Develop new and maintain and nurture existing fundraising contacts for raising funds for MLR.
- Annually raise funds necessary for the MLR budget.
- Work with other Managing Directors on special project fundraising.
- Work with Western Manager, Eastern Manager, and Glacier-Flathead Development Director to assist them in meeting their fundraising responsibilities.
- Actively pursue reimbursement of project related costs and contributions to the Land Protection Fund for all land projects.
- Develop and coordinate fundraising goals for MLR.

Financial Management

- Review, recommend, and monitor annual budgets.
- Work with investment professionals on investment and management of MLR's financial assets: General Fund, Land Protection Fund, Education and Outreach Fund, Land Acquisition Fund, Traditions Fund, Conservation Fund, Eastern Montana Fund, Glacier/Flathead Fund, and Retirement Fund.
- Act as staff liaison to MLR Board's Finance Committee.
- Analyze monthly financial statements and monitor income and expenses, and in consultation with the Operations Manager recommend modifications as necessary.

Administration

- Actively participate in policy and procedure decisions with other Managing Directors.
- Undertake special administration projects as assigned by the Board of Directors or by agreement of Managing Directors.
- Supervise specific administrative aspects of MLR with other Managing Directors as assigned.
- Supervise Western Manager (Bigfork).
- Develop annual conservation plan and five-year operational plans with other staff and Board of Directors.

Public Education and Outreach

- Develop new and nurture existing joint venture conservation with private groups and public agencies.
- Work with the public regarding the importance of private land conservation.
- Develop new and nurture existing outreach programs for targeted valley areas and watersheds.
- Liaison with northwest land trusts and Heart of the Rockies.

OVERVIEW	CULTURE	GOALS	MILESTONES	STRATEGIES	ACTIVITIES	EVALUATION
<ul style="list-style-type: none"> • Develop new and nurture existing joint venture conservation with private groups and public agencies. • Work with the public regarding the importance of private land conservation. • Develop new and nurture existing outreach programs for targeted valley areas and watersheds. • Liaison with northwest land trusts and Heart of the Rockies. 						

	MLR 2009 GOAL	DOUG MITCHELL EMPLOYEE WORK PLAN	ANTICIPATED COMPLETION DATE
LAND	Protect at least 75,000 acres of private land and at least 75 miles of river and stream banks.	Complete 4 easements in 2009.	12/31/09
	Enhance and expand neighborhood conservation maintaining 75% of new projects in existing neighborhoods.	Have 6 additional easements in the pipeline for 2010.	12/31/09
	Focus conservation on large priority agricultural projects to take advantage of enhanced tax legislation.	Contribute meaningful acreage (30,000) to the goal and meaningful miles of stream bank (20 miles).	12/31/09
MONEY	Raise \$1,700,000 in charitable gifts.	Make a smooth transition of donors which I define as:	12/31/09
	Secure \$10,000,000 in pledges to the Traditions Fund.	a) Making personal contact with every donor transferred from another fundraiser	
	Operate the General Fund with income exceeding expenses (in the black).	b) Getting a 2009 donation from 90% of donors transferred to me	
	Successfully enhance and strengthen the relationship with the Ruby Habitat Foundation and Woodson Ranch.	Create new donors with a goal of:	12/31/09
	Activate the MLR Foundation {509(a)(3)}.	a) 10 new donors of \$1,000 or more	
		b) 25 new donors of up to \$1,000	
		c) \$50,000 in new donor fundraising	
	Assist in preparing MLR annual 2010 operating budget.	9/31/09	
	Regularly review income and expense statements to ensure 2009 income exceeds expenses.	Ongoing	
	Work with the Finance Committee and Morgan Stanley to continue to build and create financial resources for the sustainability and growth of MLR.	Ongoing	
	Visit Woodson Ranch at least 3 times and raise at least \$1500 for the Ruby Habitat Foundation.	11/1/09	
STEWARDSHIP	Monitor all easements (715 easements and 65 transferred parcels).	Participate in the monitoring of at least two easements.	10/01/09
	Manage easement risk to minimize easement violations.	Ensure long-term viability of Land Protection Fund by requesting a donation to the fund from 100% of easement donors.	Ongoing
		Constantly review stewardship responsibilities in relationship to easement provisions and MLR mission.	Ongoing

OUTREACH	Perform outreach activities to support the land, financial, and stewardship goals.	Meet with at least 20 current and prospective easement donors.	12/31/09
	Participate with Ruby Habitat Foundation in neighborhood outreach.	Create and maintain strong relationships with community leaders across Montana.	Ongoing
		Participate in continuing accreditation process	Ongoing
	Successfully gain LTA accreditation.	Participate in LTA "Rally".	9/31/09
CULTURE	Maintain and enhance MLR core values.	Effectively supervise Western Manager with goal of assisting him in meeting his 2009 work plan.	Ongoing
	Implement the performance evaluation system utilizing Manager Assist.	Provide counsel and support to team implementing performance evaluation system as requested.	Ongoing
		Actively participate in all MLR meetings.	Ongoing
	Implement a compensation plan using the salary survey completed in 2008.	Implement compensation plan.	3/31/09

LANDS MANAGER -- Chris Phelps

Job Responsibilities

Stewardship/Monitoring

- Oversee all aspects of MLR's stewardship and annual monitoring programs.
- Perform annual on-site monitoring visits on each assigned easement property.
- Coordinate easement enforcement and resolution of potential and/or actual violations.
- Maintain communications between MLR and easement property owners.
- Work with easement property owners to facilitate easement compliance.
- Prepare necessary monitoring documentation and correspondence.
- Maintain easement files.
- Design and conduct special monitoring projects as necessary.
- Identify, initiate, and manage special natural resource projects as required.
- Assist, as necessary, with identification and initiation of stewardship projects for resource management and enhancement with easement property owners, and facilitate contacts with natural resource managers and consultants.
- Keep current and inform landowners of advances in natural resource management (i.e., range, forest and riparian management, noxious weed controls, etc.).

Easement Development

- Work as a team member in preparation of all easement documents.
- Assure preparation of resource documentation reports and necessary addendums on easement properties.
- Contract for necessary services and supervise contractors (RDR's, aerials).
- Coordinate and prepare all easements amendments, corrections, and compliance documents.
- In conjunction with Operations Manager, recommend and implement revisions to the easement process and base easement document.
- Coordinate compilation of easement habitat data.
- Assure aerial photography documentation of easement properties is completed.

Administration

- Undertake special administration projects as assigned by the Board of Directors or by agreement of Managing Directors.
- Oversee all aspects (prepare/monitor budget, annual plan, etc.) of the stewardship program.
- Develop funding proposals for stewardship program.
- Supervise Land Stewards (full time/seasonal).
- Collaborate in the recruitment, hiring, orientation, training, and support of full time and seasonal Land Stewards.
- Coordinate with and update staff and Board on the stewardship program.
- Complete respective portion of MLR's Conservation Plan, which includes updating this job description and setting goals for the coming year.

Public Education and Outreach

- Prepare articles for newsletters and reports as required.
- Represent MLR at various meetings and conferences.

	MLR 2009 GOAL	CHRIS PHELPS EMPLOYEE WORK PLAN	ANTICIPATED COMPLETION DATE
LAND	Protect at least 75,000 acres of private land and at least 75 miles of river and stream banks.	Assist the Easement Committee, as needed, to evaluate proposed easement projects, stewardship, and acquisition opportunities.	12/31/09
	Enhance and expand neighborhood conservation maintaining 75% of new projects in existing neighborhoods.	Evaluate and adapt easement terms to fit individual's conservation goals.	On-going
	Focus conservation on large priority agricultural projects to take advantage of enhanced tax legislation.	Contract and supervise RDR preparations.	On-going
		Provide project staff with contacts for new easement projects.	On-going
		Assist, as required, with compilation of easement habitat data, and other easement quantitative data.	1/31/09
MONEY	Raise \$1,700,000 in charitable gifts.	Prepare/monitor stewardship budget and work plan.	10/31/09
	Secure \$10,000,000 in pledges to the Traditions Fund.	Assist in developing stewardship staffing and funding proposals.	10/31/09
	Operate the General Fund with income exceeding expenses (in the black).	Educate landowners and the public about the work MLR has done. Explain the tools MLR has or hopes to have in the future (Traditions Fund, tax incentives bill, etc.).	On-going
	Successfully enhance and strengthen the relationship with the Ruby Habitat Foundation and Woodson Ranch.	Carry out monitoring and stewardship assessments in an efficient, cost-effective manner.	On-going
	Activate the MLR Foundation {509(a)(3)}.		
STEWARDSHIP	Monitor all easements (715 easements and 65 transferred parcels).	Assure all monitoring responsibilities are adequately fulfilled on all 715 easements.	12/31/09
	Manage easement risk to minimize easement violations.	Hire new seasonal Land Stewards as necessary.	On-going
		Individually monitor approximately 60 easements.	12/31/09
		Oversight of staff responsibility to implement Board policies and procedures.	On-going
		Coordinate and prepare all easement amendments, corrections, and compliance documents.	On-going
		Coordinate and collaborate with MLR counsel on the full range of easement/monitoring issues and risks.	On-going
		Coordinate easement enforcement and resolve potential and/or actual violations.	On-going

		Prepare necessary monitoring documentation and correspondence.	On-going
		Assure aerial photography documentation of easement properties is completed.	On-going
		Coordinate maintenance of complete easement files.	On-going
		Work with easement donors to facilitate easement compliance.	On-going
		Facilitate contacts and collaboration between easement owners, natural resource managers, and consultants as necessary	On-going
OUTREACH	Perform outreach activities to support the land, financial, and stewardship goals.	Promote a proactive, relationship building stewardship/monitoring program with easement donors.	On-going
	Participate with Ruby Habitat Foundation in neighborhood outreach.	Work to ensure public trust in MLR's land conservation program by consistently applying our standards and practices to our easements.	On-going
	Successfully gain LTA accreditation.	Assist, as appropriate, in extending Ruby Habitat Foundation land management practices.	On-going
		Contribute as appropriate to articles and publicity describing MLR's stewardship activities.	On-going
		Work with Management Team to do any required follow-up on MLR's accreditation application.	9/30/09
CULTURE	Maintain and enhance MLR core values.	Work as a member of the Management Team to participate and assist in organizational management.	On-going
	Implement the performance evaluation system utilizing Manager Assist.	Supervise and evaluate performance, and review compensation for full-time and seasonal Land Stewards.	On-going
	Implement a compensation plan using the salary survey completed in 2008.	Integrate stewardship program management in policy, work plans, and staff structure.	On-going
		Coordinate with staff and Board the role of stewardship in MLR's management and operations.	On-going

MANAGING DIRECTOR - Rock Ringling

Job Responsibilities

Land Conservation

- See, recruit, and contact landowners who are potential conservation easement donors.
- Work directly with landowners in assembling all necessary legal documents and work with project team to draft conservation easements.
- Responsible for the completion of easement projects.
- Develop marketing for land projects to general agricultural community.
- Work to find conservation buyers for important properties suitable for MLR easements.
- Expand tax incentives for private land conservation at national level.
- Protect private land conservation programs for Montana's private landowners at the state level.

Fundraising

- Develop new and maintain and nurture existing fundraising contacts for funds for MLR.
- Annually raise funds necessary for the MLR budget.
- Work with other Managing Directors on special project fundraising.
- Work with Western Manager, Eastern Manager, and Glacier-Flathead Development Director to assist them in meeting their fundraising responsibilities.
- Actively pursue reimbursement of project related costs and contributions to the Land Protection Fund for all land projects.

Administration

- Actively participate in policy and procedure decisions with other Managing Directors.
- Undertake special administration projects as assigned by the Board of Directors or by agreement of Managing Directors.
- Work with Board on Outreach Committee.
- Work with Management Team on short and long-term issues affecting MLR.
- Supervise specific administrative aspects of MLR with other Managing Directors as assigned.
- Supervise Eastern Montana Manager.
- Serve on the Board of Ruby Habitat Foundations as MLR representative.
- Develop annual conservation plan and five-year operational plans with other staff and Board of Directors.

Public Education and Outreach

- Develop new and nurture existing joint venture conservation with private groups and public agencies.
- Work with the public regarding the importance of private land stewardship.
- Develop new and nurture existing outreach programs for targeted valley areas and watersheds.
- Develop, monitor, and promote national legislation that affects MLR's private land conservation goals.
- Complete annual report.
- Develop annual newsletters.

	MLR 2009 GOAL	ROCK RINGLING EMPLOYEE WORK PLAN	ANTICIPATED COMPLETION DATE
LAND	Protect at least 75,000 acres of private land and at least 75 miles of river and stream banks.	Complete easements on 5 properties covering 15,000 acres across Montana with emphasis on MLR neighborhoods. Work with MLR team members to assure completion.	12/31/09
	Enhance and expand neighborhood conservation maintaining 75% of new projects in existing neighborhoods.	Work at the national level to extend the enhanced provision for the donation of conservation easements for qualified farmers and ranchers.	6/30/09
	Focus conservation on large priority agricultural projects to take advantage of enhanced tax legislation.	Work with conservation buyers and MLR staff to identify properties for purchase.	On-going
		Work with staff to expand neighborhoods through conservation easements.	On-going
		Review and prioritize projects to ensure the projects meet MLR goals.	On-going
		Oversee outreach to identified MLR neighborhoods for increased land protection opportunities.	On-going
		Work with other Managing Directors and Management Team on Bill Long's transition to retirement.	6/1/09
MONEY	Raise \$1,700,000 in charitable gifts.	Raise at least \$500,000 for MLR funds.	12/31/09
	Secure \$10,000,000 in pledges to the Traditions Fund.	Make trips to New York and Minneapolis and Philadelphia to solicit funds for MLR.	On-going
	Operate the General Fund with income exceeding expenses (in the black).	Work with other Managing Directors and other fundraising staff to expand pool of funding for MLR.	On-going
	Successfully enhance and strengthen the relationship with the Ruby Habitat Foundation and Woodson Ranch.	Work with MLR Board and staff to ensure budget and financial priorities are met.	On-going
	Activate the MLR Foundation {509(a)(3)}.	Raise \$2 million toward MLR's Traditions Fund, working with other Managing Directors and MLR's Board of Directors.	12/31/09
		Attend three Board meetings for Ruby Habitat and assist in the long-term goals for Woodson Ranch.	12/31/09
		Work with Ruby Habitat to identify and expand funding base for the foundation.	On-going
		Participate in four MLR fishing trips to expand fundraising for MLR.	On-going for 09

		Work with MLR's Managing Directors to expand MLR's funding base to secure both General Fund and Traditions Fund monies.	On-going
		Continue one-on-one fundraising.	On-going
STEWARDSHIP	Monitor all easements (715 easements and 65 transferred parcels).	Work with Lands Manager as needed on easement violations and amendments.	On-going
	Manage easement risk to minimize easement violations.		
OUTREACH	Perform outreach activities to support the land, financial, and stewardship goals.	Work with Mary Hanson on agricultural outreach activities to expand the positive image for private land conservation for land owners.	On-going
	Participate with Ruby Habitat Foundation in neighborhood outreach.	Work with Mary on expansion of ABRT projects and funding.	On-going
	Successfully gain LTA accreditation.	Work with Les Gilman and the Woodson family on neighborhood meetings to spread the word on RHF activities.	On-going
		Work with the Management Team to establish clear communication about the future direction of MLR and expectations of the Management Team.	On-going
		Work with Board of Directors setting policy and programs for MLR.	On-going
		Work with Operations Manager as needed on accreditation.	On-going
CULTURE	Maintain and enhance MLR core values.	Work with Board in establishing measurable performance goals for MLR.	On-going
	Implement the performance evaluation system utilizing Manager Assist.	Work with Management Team to complete salary and benefits package for Board presentation.	2/24/09
	Implement a compensation plan using the salary survey completed in 2008.	Work with MLR Board on outreach goals and potential of expanding MLR's public face.	On-going

GLACIER/FLATHEAD DEVELOPMENT DIRECTOR -- Amy Royer

Job Responsibilities

Fundraising

- Develop new and maintain and nurture existing fundraising contacts for raising funds for MLR.
- Annually raise funds necessary for the MLR budget.
- Work with the Western Manager and Managing Directors on special project fundraising.
- Work as the Event Coordinator for MLR's special events such as annual celebration party, art shows, Women's Outdoor Adventure trips, Women's Outdoor Adventure alumni luncheon, and other special events.
- Assist with fundraising, public education, and outreach activities related to the Western Montana office.
- Actively pursue reimbursement for project related costs and contributions to the Land Protection Fund.

Land Conservation

- See, recruit, and contact landowners who are potential conservation easement donors. Work on 1-2 high priority land projects annually in the Northern Continental Divide Ecosystem.
- Work directly with landowners in assembling all necessary legal documents, and work with the project team to draft conservation easements.
- Problem-solve and assist Western Manager, Administrative Assistant, and Land Stewards with issues and violations that arise from projects that originate in the Western Montana office.

Administration

- As requested, assist the Western Manager in reviewing and establishing the budget and general operations.
- Undertake special administration projects as assigned by the Board, Managing Directors, and Western Manager.
- Complete respective portion of MLR's Conservation Plan, which includes updating this job description and setting goals for the coming year.

	MLR 2009 GOAL	AMY ROYER EMPLOYEE WORK PLAN	ANTICIPATED COMPLETION DATE
LAND	Protect at least 75,000 acres of private land and at least 75 miles of river and stream banks.	Oversee the completion of 2 conservation easements within and around the NCDE working with landowners and MLR team. Ensure funding is obtained for project costs and Land Protection Fund.	12/31/09
	Enhance and expand neighborhood conservation maintaining 75% of new projects in existing neighborhoods.	Match one (1) conservation buyer with a listed property.	12/31/09
	Focus conservation on large priority agricultural projects to take advantage of enhanced tax legislation.	Work with FRPP, as well as Missoula County open space bond, for funding options in and around the NCDE.	On-going
		Assist Western Manager with land projects and funding opportunities.	On-going
MONEY	Raise \$1,700,000 in charitable gifts.	Raise \$275,000 through personal contacts, events, funding letters, land projects, grants, and including such programs as:	12/31/09
	Secure \$10,000,000 in pledges to the Traditions Fund.		
	Operate the General Fund with income exceeding expenses (in the black).	* Oversee and participate in the Women's Outdoor Adventure trips to ensure trip success: five (5) trips, raising \$35,000. Annual fall alumni luncheon. Secure "match" dollars.	
	Successfully enhance and strengthen the relationship with the Ruby Habitat Foundation and Woodson Ranch.	* Oversee, as Event Coordinator, all aspects of the Summer Fundraising Event raising \$25,000. Work with MLR team and contracted personnel to ensure successful event.	
Activate the MLR Foundation {509(a)(3)}.	* Four (4) out-of-state trips to nurture and expand donor base in California and Colorado.		
	Continue to review the tracking system that will nurture and expand funding base for the Glacier/Flathead office. Tracking system for Land Protection Fund donor base.	On-going	
	Secure \$1,000,000 for the Traditions Fund.	On-going	
STEWARDSHIP	Monitor all easements (715 easements and 65 transferred parcels).	Work with the stewardship team on problem solving and landowner contacts regarding violations that arise on projects that originated from the G/F office.	On-going
	Manage easement risk to minimize easement violations.	Assist seasonal Land Stewards with questions regarding projects and organization.	On-going

OUTREACH	Perform outreach activities to support the land, financial, and stewardship goals.	Oversee 17 th Annual Celebration Party, June 25 th with the goal of expanding the attendance to 200.	7/09
	Participate with Ruby Habitat Foundation in neighborhood outreach.	Continue to participate, as needed, on the Swan Lands Committee that meets on a quarterly basis.	On-going
	Successfully gain LTA accreditation.	Assist MLR team with state and federal legislation.	On-going
CULTURE	Maintain and enhance MLR core values.	Work with Western Manager and Admin. Assistant to further the accomplishments of the regional goals, as well as organization goals.	On-going
	Implement the performance evaluation system utilizing Manager Assist.	Continue to be responsive and respectful to staff and Board.	On-going
	Implement a compensation plan using the salary survey completed in 2008.	Continue to participate in the management of MLR as a team member to further the accomplishments of the organization goals.	On-going
		Assist and participate in the presentations and information shared at the staff retreat and annual meeting and to provide leadership as needed.	On-going

WESTERN MONTANA MANAGER - Mark Schiltz

Job Responsibilities

Land Conservation

- See, recruit, and contact landowners who are potential conservation easement donors.
- Work directly with landowners in assembling all necessary legal documents, and work with the project team to draft conservation easements.
- Oversee easement projects for Western Montana office.
- Work to find conservation buyers for important properties suitable for MLR easements.
- Problem-solve and assist Operations and Lands managers, and Land Stewards with issues and violations that arise on easements originating in the Western Montana office.

Fundraising

- Work with the Glacier/Flathead Development Director to develop new and maintain and nurture existing fundraising contacts for raising funds for MLR.
- Annually raise funds necessary for the MLR budget.
- Work with Glacier/Flathead Development Director and Managing Directors on special project fundraising.
- Actively pursue reimbursement for project related costs and contributions to the Land Protection Fund.

Public Education and Outreach

- Coordinate outreach efforts in western Montana and be responsible for program development and implementation.
- Develop new and nurture existing joint venture conservation with private groups and public agencies.
- Work with the public regarding the importance of private land conservation and stewardship.
- Develop outreach programs for targeted valley areas and watersheds.
- Develop and coordinate news releases, articles, and other public relations regarding MLR's activities in western Montana.

Administration

- Undertake special administration projects as assigned by the Managing Directors and Board.
- Oversee all aspects (personnel, budget, etc.) of the Western Montana office.
- Coordinate with and update staff and Board on western Montana operations.
- Complete respective portion of MLR's Conservation Plan, which includes updating this job description and setting goals for the coming year.

	MLR 2009 GOAL	MARK SCHILTZ EMPLOYEE WORK PLAN	ANTICIPATED COMPLETION DATE
LAND	Protect at least 75,000 acres of private land and at least 75 miles of river and stream banks.	Complete 5-7 conservation easements, protecting 1,500 acres and 10 miles of river/stream bank.	12/31/09
	Enhance and expand neighborhood conservation maintaining 75% of new projects in neighborhoods.	Focus project work in established easement neighborhoods to enhance the overall benefits of conservation for both agricultural and wildlife habitat purposes.	On-going
	Focus conservation on large priority agricultural projects to take advantage of enhanced tax legislation.	Establish new centers of neighborhood conservation by developing projects which contain high priority conservation values.	On-going
		Identify key pieces of property for sale and provide details to prospective conservation buyers.	On-going
MONEY	Raise \$1,700,000 in charitable gifts.	Raise \$50,000 for MLR General Fund. Assist in raising funds for Traditions Fund and Land Protection Fund.	12/31/09
	Secure \$10,000,000 in pledges to the Traditions Fund.	Cultivate list of new donors committed to furthering MLR's goal and mission.	On-going
	Operate the General Fund with income exceeding expenses (in the black).	Manage, oversee, and be responsible for all fiscal expenditures of the Western office. Use funds in a prudent practical manner to both further the goals of MLR, and remain within established budget guidelines.	On-going
	Successfully enhance and strengthen the relationship with the Ruby Habitat Foundation and Woodson Ranch.	Work with, and assist, G/F Development Director in various fundraising efforts including Annual Celebration Party and other events.	On-going
STEWARDSHIP	Monitor all easements. (715 easements and 65 transferred parcels)	Assist new NW seasonal Land Steward with questions regarding annual monitoring.	On-going
	Manage easement risk to minimize easement violations.	Provide stewardship staff with information and assistance to resolve conflicts pertaining to land use issues of existing easements.	On-going
		Assist in drafting language in new easements that clarify permitted and non-permitted uses, reducing the probability of future disagreement in the interpretation of those terms.	On-going

OUTREACH	Perform outreach activities to support the land, financial, and stewardship goals.	Oversee outreach activities in NW Montana. Plan, organize, and conduct outreach sessions in the Thompson Falls, Mission Valley, and Eureka regions. Continue outreach in the Swan and North Fork watersheds. Explore other opportunities to provide public outreach.	On-going
	Participate with Ruby Habitat Foundation in neighborhood outreach.		
	Successfully gain LTA accreditation.	Develop relationships with past easement donors to discover and develop new easement opportunities in those conservation neighborhoods.	On-going
		Educate the general public to expand the positive image of the MLR. Make all efforts to explain the facts, and dispel the myths and misinformation surrounding conservation easements.	On-going
		Contact landowners, business managers, local officials, and other agency personnel to educate and provide accurate input and information that will promote conservation.	On-going
CULTURE	Maintain and enhance MLR core values.	Manage the Western office using fair judgment, clear communication techniques, and positive reinforcement to ensure the best efforts and abilities of all staff are exemplified. Cultivate an atmosphere of trust and respect for all individuals.	On-going
	Implement the performance evaluation system utilizing Manager Assist.		
	Implement a compensation plan using the salary survey completed in 2008.	Maintain and cultivate the same atmosphere with staff in Helena.	On-going
		Communicate regularly with staff in Helena to clarify and define my performance and job expectations. Report and be responsible to both the Managing Directors and MLR Board of Directors for all my actions and responsibilities.	On-going

LAND STEWARD - Randy Smith

Job Responsibilities

Monitoring

- Assist Lands Manager in the administration of MLR's easement monitoring program.
- Perform annual on-site monitoring visits on each assigned easement property.
- Maintain communications between MLR and easement landowners.
- Prepare necessary monitoring documentation and correspondence.
- Design and conduct special monitoring projects as necessary.
- Address easement violations and conduct necessary follow-up.

Stewardship

- Work with easement property owners to facilitate easement compliance.
- Prepare, as requested, resource documentation reports and necessary addendums for easement properties.
- Maintain easement files.
- Identify, initiate, and manage special natural resource projects as required.
- Facilitate contacts and collaboration between easement property owners, natural resource managers, and consultants as necessary.
- Keep current and inform landowners of advances in natural resource management (range, forest and riparian management, noxious weed controls, etc.).

Administration

- Assist Lands Manager in developing the annual stewardship budget.
- Supervise seasonal Land Stewards located west of Continental Divide.
- Recruit and hire additional seasonal Land Stewards as necessary to monitor MLR's growing portfolio of conservation easements.
- Provide adequate orientation, training, and support for new and existing seasonal staff.
- Develop funding proposals for stewardship program.
- Complete respective portion of MLR's Conservation Plan, which includes updating this job description and setting goals for the coming year.

Public Education and Outreach

- Prepare articles for newsletters and reports as required.
- Represent MLR at various meetings and conferences.

	MLR 2009 GOAL	RANDY SMITH EMPLOYEE WORK PLAN	ANTICIPATED COMPLETION DATE
LAND	Protect at least 75,000 acres of private land and at least 75 miles of river and stream banks.	Work closely with landowners, various agencies and organizations, and the public to develop and maintain positive trusting relationships that result in additional easements and recommendations to other landowners to donate easements.	On-going
	Enhance and expand neighborhood conservation maintaining 75% of new projects in neighborhoods.	Visit with current easement holders, various agencies and organizations, and the public about other properties/landowners in the area that should be contacted about donating easements. Provide project staff with contacts for new easement projects.	On-going
	Focus conservation on large priority agricultural projects to take advantage of enhanced tax legislation.	Assist team in evaluating proposed easement properties.	On-going
		Work closely with landowners and the public to develop and maintain positive trusting relationships that result in continuing or increasing charitable gifts and their recommendations to others to support MLR.	On-going
MONEY	Raise \$1,700,000 in charitable gifts.	Educate landowners and the public about the work MLR has done. Explain the tools MLR has or hopes to have in the future (Traditions Fund, tax incentives bill, etc.). Show landowners and the public what great work MLR can do in the future with these tools and the \$ to fund them.	On-going
	Secure \$10,000,000 in pledges to the Traditions Fund.	Assist Lands Manager in developing the annual stewardship budget and work plan.	10/31/09
	Operate the General Fund with income exceeding expenses (in the black).	Carry out monitoring and stewardship assessments in an efficient, cost-effective manner.	On-going
	Successfully enhance and strengthen the relationship with the Ruby Habitat Foundation and Woodson Ranch.		
STEWARDSHIP	Activate the MLR Foundation {509(a)(3)}.	Monitor 78 easements, working with landowners to ensure understanding and compliance. Work closely with staff and Board to deal with issues that arise.	12/31/09
	Monitor all easements. (715 easements and 65 transferred parcels)	Supervise the performance of 4 seasonal Land Stewards that monitor an additional 158 easements, assisting them with issues as needed.	On-going
	Manage easement risk to minimize easement violations.	Hire and train additional seasonal Land Stewards as needed.	On-going
		Finish write-ups on 2 RDR's on new easement properties.	3/31/09

		Complete field visits for 2-3 RDR's on future easement properties.	12/1/09
OUTREACH	Perform outreach activities to support the land, financial, and stewardship goals.	Attend regular meetings of Conservation Strategies Comm., Wildlife Comm., and CE working group – Blackfoot Challenge. Attend Missoula Co. Rural Initiatives and Legacy Project meetings.	On-going
	Participate with Ruby Habitat Foundation in neighborhood outreach.	Attend outreach and various other meetings and visit with interested people and answer questions about conservation easements, stewardship, and monitoring.	On-going
	Successfully gain LTA accreditation.	Assist in the preparation of the website, newsletters, and various reports as needed.	On-going
CULTURE	Maintain and enhance MLR core values.	Work with seasonal Land Stewards to ensure the stewardship program for the west side is integrated with the goals, objectives, and work plans contained in MLR's 2009 Conservation Plan.	12/31/09
	Implement the performance evaluation system utilizing Manager Assist.		
	Implement a compensation plan using the salary survey completed in 2008.		

BOOKKEEPER – Becky Stearns

Job Responsibilities

Accounting/Record keeping

- Process bills; conduct banking transactions; post and balance income ledgers, expense ledgers, accounts payable, accounts receivable, and expenditures by project and expense category; compute budget/expense comparisons; post contributor's funding records; and calculate fundraising trip expenses and billing amounts.
- Post and balance MLR's General Fund accounts (savings, checking and CD's) and investment accounts.
- Prepare and distribute monthly financial statement.
- Maintain payroll/cafeteria plan for all MLR offices:
 - Bi-monthly/monthly: calculate federal, FICA, Medicare, and state withholding and deposit tax payments; maintain vacation and sick leave records; transmit 401(k) deposits.
 - Quarterly: calculate liability on federal, FICA, Medicare, and state withholding, unemployment insurance, and worker's compensation and prepare necessary reports; and transmit retirement deposit.
 - Annually: prepare W2/1099's; statements for federal and state tax departments.
- Calculate and prepare MBO report on hours worked by each employee.
- Maintain insurance for vehicles, boats, liability, and offices; submit any insurance claims for MLR.
- Maintain maintenance and licensing records, ensuring that all boats and vehicles are licensed and serviced on a regular basis if appropriate.
- Negotiate and maintain maintenance agreements and purchase necessary equipment.
- Maintain inventory of general office supplies and equipment, ordering as necessary or at staff's request.
- Assist Operations Manager in the preparation of the annual operating budget for the entire organization and the annual tax return (990 form).
- Assist with the set-up and maintain accounting records for MLR Foundation (post & balance investment accounts, coordinate Board meetings, prepare meeting minutes, etc.).

Administration

- Responsible for the Helena Office Assistant's job functions in her/his absence and as back-up on reception duties (answer phones daily during lunch hour).
- Assist Operations Manager with maintenance and purchasing of necessary upgrades for MLR's network computer system.
- Assist in the production of MLR publications, maintain inventory (restocking when appropriate).
- Complete respective portion of MLR's Conservation Plan, which includes updating this job description and setting goals for the coming year.

	MLR 2009 GOAL	BECKY STEARNS EMPLOYEE WORK PLAN	ANTICIPATED COMPLETION DATE
LAND	Protect at least 75,000 acres of private land and at least 75 miles of river and stream banks.	Continue to assist with answering and directing phone calls, walk-in clients, etc. interested in private land conservation and MLR.	On-going
	Enhance and expand neighborhood conservation maintaining 75% of new projects in neighborhoods.		
	Focus conservation on large priority agricultural projects to take advantage of enhanced tax legislation.		
MONEY	Raise \$1,700,000 in charitable gifts.	Track, record, and keep staff informed of all income, donations, etc. Generate acknowledgements to donors in a timely manner.	On-going
	Secure \$10,000,000 in pledges to the Traditions Fund.		
	Operate the General Fund with income exceeding expenses (in the black).	Balance income, expenses, investment accounts, etc. on a monthly basis. Generate financial statements on a monthly basis to keep staff informed. Bring anything not within budget to the attention of Operations Manager.	On-going
	Successfully enhance and strengthen the relationship with the Ruby Habitat Foundation and Woodson Ranch.	Work with Campaign Coordinator and fundraisers to track, record, and keep staff informed of all Traditions Fund income and pledges.	On-going
	Activate the MLR Foundation {509(a)(3)}.	Work w/Operations Manager on budgets, 990 prep., yearly audit, etc.	On-going
		Establish accounting records for the MLR Foundation.	6-01-09
		Maintain accounting books and financial records for the MLR 509(a)(3) Foundation. Attend meetings, take minutes, etc.	On-going
STEWARDSHIP	Monitor all easements. (715 easements and 65 transferred parcels)	Assist Operations Mgr. with editing, mailing, etc., of new and existing easement documents as needed.	On-going
	Manage easement risk to minimize easement violations.	Assist in directing landowners, easement holders, etc. to the appropriate personnel.	On-going

OUTREACH	Perform outreach activities to support the land, financial, and stewardship goals.	Assist as needed with outreach and fundraising activities including WOA trips, Ruby trips and other fundraising trips. Continue to maintain fundraising trip information, track expenses and income, and generate invoices for each trip.	On-going
	Participate with Ruby Habitat Foundation in neighborhood outreach.		
	Successfully gain LTA accreditation.	Help to educate the general public as to the mission of the Montana Land Reliance and the Ruby Habitat Foundation.	On-going
CULTURE	Maintain and enhance MLR core values.	Assist as needed with brochures, annual reports, newsletters, etc. Assist with mailing publications; including annual mailings and mailings per individual request to help keep the public informed about MLR.	On-going
	Implement the performance evaluation system utilizing Manager Assist.	Assist all staff in any and all aspects of daily operations of MLR. Maintain and keep current computer system working properly. Troubleshoot and handle employee computer issues, etc. Be available to assist Operations Mgr, Managing Directors and all other staff as needed.	On-going
	Implement a compensation plan using the salary survey completed in 2008.	Continue good communications with all MLR staff, Board members, donors, landowners, etc.	On-going
		Assist staff in office and outlying areas with expense issues, payroll timelines, etc. Assist staff as needed with other needs including supplies, forms, etc.	On-going
		Represent MLR in a professional and courteous manner both in the office and outside the office.	On-going
		Continue to provide the best land conservation in the business.	On-going

ADMINISTRATIVE ASSISTANT (WESTERN) – Joanne Tatro

Job Responsibilities

Administration

- Type, edit, copy, distribute, and file general correspondence, project correspondence, and assist in completing and tracking of fundraising proposals. Responsible for proofreading and editing of documents for grammatical/spelling accuracy, readability, appearance, and accuracy of facts presented.
- Answer telephone and receive visitors, directing them to the proper staff for action, answering general inquiries, managing conservation easement requests, and distributing informational materials.
- Retrieve and distribute incoming mail and collect and deliver outgoing mail to the post office. Track movement of Western office staff and maintain a schedule of staff absences and whereabouts and maintain telephone numbers to contact staff during absences.
- Responsible for supplying copies of required documents (i.e., funding proposals, publication distribution lists, project related correspondence, etc.) to Helena staff.
- Complete respective portion of MLR's Conservation Plan, which includes updating this job description and setting goals for the coming year.

Fundraising/Outreach Support

- Assist with fundraising events, i.e., annual celebration party, art shows, Women's Outdoor Adventure trips, Women's Outdoor Adventure alumni luncheon, and other events, which includes, but is not limited to, creating, producing, and distributing brochures, invitations, and related documents, maintaining accurate invitation lists, making accommodation arrangements (including lodging, outfitting, travel), tracking all rsvp's, coordinating ticket sales and client reservations, and assisting in creating and maintaining event budgets.
- Assist with fundraising and outreach activities, i.e., distribution of annual reports, brochures, and fundraising letters (keep database accurate for mailings, coordinating, creating, and organizing mailing of landowner and general fundraising letters, mapping, and organizing meetings), and fundraising trips (assist in coordinating out-of-state trips including setting up meetings and obtaining airline tickets).

Easement Support

- Assist with land project related tasks as requested, i.e., mapping, obtaining supporting documents, and preparing project write-ups and easement drafting information/checklist forms. Assist stewardship staff in Western Montana with project related work, i.e., letters, copying, mailings.
- Request and track cost share dollars for project costs and appraisals with associated agencies, i.e., Montana Department of Fish, Wildlife and Parks, which includes writing request letter, tracking request to completion, and updating the Western office's tracking form with appropriate information.
- Coordinate completion of easement certificates with Helena Assistant. Frame certificates and track certificate distribution.

Record Keeping

- Responsible for maintaining the organizational database with regard to Western office clients.
- Responsible for establishment and maintenance of Western office files (funding, publicity, organizational, projects, and completed easements).
- Administer petty cash fund, supplying Helena staff with appropriate receipts/documentation.

Miscellaneous

- Develop a full working knowledge of computer programs (i.e., MLR database, E-mail, word processing, and other relevant systems).
- Computer maintenance including back-ups and file management.
- Maintain inventory (ordering where appropriate) of office supplies and stationery products.
- Maintain and operate office equipment (computer, copier, fax machine, etc.).
- Perform special projects as may be requested.

	MLR 2009 GOAL	JOANNE TATRO EMPLOYEE WORK PLAN	ANTICIPATED COMPLETION DATE
LAND	Protect at least 75,000 acres of private land and at least 75 miles of river and stream banks.	Assist Western Manager and G/F Development Director with land project related tasks, i.e., mapping, updating neighborhood mailing lists, obtaining supporting documentation. Assist in completing project write-ups and easement drafting checklist forms, request and track cost share dollars, work with appraisers and FWP to provide easements and RDR's and any additional information needed.	On-going
	Enhance and expand neighborhood conservation maintaining 75% of new projects in neighborhoods.		
	Focus conservation on large priority agricultural projects to take advantage of enhanced tax legislation.		
MONEY	Raise \$1,700,000 in charitable gifts.	Assist G/F Development Director with 5 WOA trips in 2009 which includes producing and mailing of WOA brochures, coordinating and tracking client reservations, securing lodging and transportation, tracking money, maintaining trip budgets.	9/30/09
	Secure \$10,000,000 in pledges to the Traditions Fund.		
	Operate the General Fund with income exceeding expenses (in the black).	Assist G/F Development Director with WOA Annual Fall Luncheon which includes coordinating and creating invitation, mailing lists, tracking of all RSVP's, and assisting with all details of the luncheon.	10/30/09
	Successfully enhance and strengthen the relationship with the Ruby Habitat Foundation and Woodson Ranch.		
	Activate the MLR Foundation {509(a)(3)}.	Assist G/F Development Director with 2009 Summer Fundraising Event which includes assist with coordination of entertainment, creating and organizing invitations, ticket sales, maintaining event budget, tracking all RSVP's, tickets and inquiries.	8/07/09
		Assist G/F Development Director with coordinating 4 out of state fundraising trips to Colorado and California by coordinating flights, meetings, and accommodations.	4/09; 5/09; 10/09;11/09
		Fundraising letters – generate fundraising mailer that is sent out each fall which includes coordinating, creating, and organizing letters and maintaining accurate mailing lists for the Western Manager and G/F Development Director.	11/30/09
	Assist G/F Development Director and Western Manager in coordinating and preparing grant proposals.	On-going	

STEWARDSHIP	Monitor all easements. (715 easements and 65 transferred parcels)	Provide clerical support for Land Stewards and seasonal Land Stewards as needed.	On-going
	Manage easement risk to minimize easement violations.		
OUTREACH	Perform outreach activities to support the land, financial, and stewardship goals.	Assist G/F Development Director and Western Manager with all aspects of the 17 th Annual Celebration Party which includes coordinate, create, and organize invitations, maintain accurate mailing list, secure entertainment, secure caterer, track all RSVP's, and maintain event budget.	7/03/09
	Participate with Ruby Habitat Foundation in neighborhood outreach.		
	Successfully gain LTA accreditation.	Assist Western Manager with outreach efforts by assisting with neighborhood meetings, maintaining accurate mailing lists, and assisting with mapping land ownership.	On-going
		Conservation easement inquiries – managing requests and distributing information on MLR and conservation easements in an accurate and timely manner.	On-going
CULTURE	Maintain and enhance MLR core values.	Continue to maintain continuous positive and cooperative working relationships with clients, MLR Staff, MLR Board, and the public.	On-going
	Implement the performance evaluation system utilizing Manager Assist. Implement a compensation plan using the salary survey completed in 2008.	Continue to be dependable, accountable, and a team player providing a positive, successful working relationship with MLR staff, Board, and clients.	On-going

SEASONAL LAND STEWARD

Job Responsibilities

Monitoring

- Assist in the implementation of MLR's easement monitoring program.
- Perform annual on-site monitoring visit on each assigned easement property.
- Prepare necessary monitoring documentation in conjunction with the annual property site visits.
- Work with easement property owners to facilitate easement compliance.
- Maintain communications between MLR and easement property owners.
- Address easement violations in consultation with other MLR stewardship staff and conduct necessary follow-up.
- Design and conduct special monitoring projects as required.
- Maintain easement files.
- Submit copies of legal documents (changes in deeds, rights-of-ways, etc.) and other important correspondence to Helena office for inclusion in the easement files.
- Provide any changes in easement donor information, addresses, phone numbers, etc, to Helena office for updating the databases.
- Perform on-site compliance monitoring visit on each easement assigned at least annually.

Stewardship

- Assist, as necessary, with identification and initiation of stewardship projects for resource management and enhancement with easement property owners, and facilitate contacts with natural resource managers and consultants.
- Keep current and inform easement property owners of advances in natural resource management (i.e., range, forest and riparian management, noxious weed controls, etc.).

	MLR 2009 GOAL	SEASONAL LAND STEWARDS EMPLOYEE WORK PLAN	ANTICIPATED COMPLETION DATE
LAND	Protect at least 75,000 acres of private land and at least 75 miles of river and stream banks.	Provide project staff with contacts for new easement projects.	On-going
	Enhance and expand neighborhood conservation maintaining 75% of new projects in neighborhoods.		
	Focus conservation on large priority agricultural projects to take advantage of enhanced tax legislation.		
MONEY	Raise \$1,700,000 in charitable gifts.	Refer potential donors to MLR fundraising staff.	On-going
	Secure \$10,000,000 in pledges to the Traditions Fund.		
	Operate the General Fund with income exceeding expenses (in the black).	Educate landowners and the public about the work MLR has done. Explain the tools MLR has or hopes to have in the future (Traditions Fund, tax incentives bill, etc.).	On-going
	Successfully enhance and strengthen the relationship with the Ruby Habitat Foundation and Woodson Ranch.	Carry out monitoring and stewardship assessments in an efficient, cost-effective manner.	On-going
	Activate the MLR Foundation {509(a)(3)}.		
STEWARDSHIP	Monitor all easements. (715 easements and 65 transferred parcels)	Perform annual on-site monitoring visit on each assigned easement property. Assure that all other assigned monitoring responsibilities are adequately fulfilled.	12/31/09
	Manage easement risk to minimize easement violations.	Work with easement owners to facilitate easement compliance.	On-going
		Collaborate on preparation of easement amendments, corrections and compliance documents.	On-going
		Collaborate on easement enforcement and help resolve potential and actual violations.	On-going
		Implement Board policies and procedures relative to stewardship and monitoring.	On-going
		Prepare necessary monitoring documentation and correspondence and assure maintenance of complete easement files.	On-going

		Submit copies of legal documents (changes of deeds, rights-of-way, etc.), compliance documents, and correspondence to Helena office for inclusion in easement files.	On-going
		Provide any changes in easement donor information, addresses, phones, etc. to Helena office for updating the appropriate databases.	On-going
OUTREACH	Perform outreach activities to support the land, financial, and stewardship goals.	Promote a proactive relationship building stewardship/monitoring program with easement owners.	On-going
	Participate with Ruby Habitat Foundation in neighborhood outreach.	Facilitate contacts and collaboration between easement owners and natural resource managers and consultants as necessary.	On-going
	Successfully gain LTA accreditation.	Work to promote and ensure public trust in MLR's land conservation program.	On-going
		Serve as a representative of MLR in local communities. Maintain a professional decorum when interacting with landowners and promote the organizational mission of MLR whenever possible.	On-going
CULTURE	Maintain and enhance MLR core values.	Work as a member of the MLR stewardship team to represent and promote MLR core values.	On-going
	Implement the performance evaluation system utilizing Manager Assist.	Participate in the annual stewardship meeting and Staff Retreat to promote MLR teamwork and camaraderie.	On-going
	Implement a compensation plan using the salary survey completed in 2008.		

VIII. Budget

See attached Excel Spreadsheet

IX. Criteria for Adoption of Conservation Plan

Plan must:

- Be empowering
- Promote core values
- Promote professionalism
- Be affordable
- Be attainable
- Sustain organizational viability

2009 BUDGET

2009 INCOME BUDGET

	2009	2008	2008 Projected Year-End	2008 Actual Year-End
GENERAL SUPPORT				
Foundations	\$475,000.00	\$460,000.00	\$455,000.00	\$566,499.00
Individuals	625,000.00	520,000.00	520,000.00	379,933.00
Land Projects	12,000.00	12,000.00	12,000.00	4,000.00
Receipts (book sales, miscellaneous)	2,000.00	3,000.00	1,000.00	5,073.00
Investment Income				
Operating Surplus				
Avg Balance \$500,000 @ 4.75%	12,500.00	20,000.00	14,000.00	15,223.00
Art Auction	25,000.00	25,000.00	8,000.00	7,227.00
Associate Supporters	2,500.00	1,000.00	2,500.00	715.00
Organizations/Corporations	47,000.00	45,000.00	51,000.00	36,897.00
TOTAL GENERAL SUPPORT	\$1,201,000.00	\$1,086,000.00	\$1,063,500.00	\$1,015,567.00
LAND PROTECTION FUND				
Contributions	\$250,000.00	\$260,000.00	\$252,000.00	206,881.00
Interest and Dividends	325,000.00	316,000.00	322,000.00	333,229.00
TOTAL LPF INCOME	\$575,000.00	\$576,000.00	\$574,000.00	\$540,110.00
EDUCATION & OUTREACH FUND				
Contributions	\$0.00	\$0.00	\$33,000.00	38,591.00
Interest and Dividends	110,000.00	108,000.00	109,000.00	126,700.00
TOTAL EOF INCOME	\$110,000.00	\$108,000.00	\$142,000.00	\$165,291.00
EASTERN MONTANA FUND				
Contributions	\$0.00	\$0.00	\$2,000.00	\$1,000.00
Interest and Dividends	43,000.00	43,000.00	43,000.00	44,401.00
TOTAL EMF INCOME	\$43,000.00	\$43,000.00	\$45,000.00	\$45,401.00
GLACIER/FLATHEAD FUND				
Contributions	\$0.00	\$10,000.00	\$0.00	\$0.00
Interest and Dividends	33,000.00	38,000.00	32,000.00	34,442.00
TOTAL GFF INCOME	\$33,000.00	\$48,000.00	\$32,000.00	\$34,442.00
CONSERVATION FUND				
Contributions	\$0.00	\$0.00	\$0.00	\$0.00
Interest and Dividends	6,000.00	4,000.00	6,500.00	6,816.00
TOTAL CONSERVATION FUND INCOME	\$6,000.00	\$4,000.00	\$6,500.00	\$6,816.00
LAND ACQUISITION FUND (prior to 6/9/08 Legacy Fund)				
Contributions	\$200,000.00	\$180,000.00	\$200,000.00	\$274,420.00
Interest and Dividends	35,000.00	20,000.00	39,000.00	49,597.00
TOTAL LAND ACQUISITION FUND INCOME	\$235,000.00	\$200,000.00	\$239,000.00	\$324,017.00
MANAGED PORTFOLIO FUND				
Contributions	\$0.00	\$0.00	\$0.00	\$0.00
Interest and Dividends	18,000.00	0.00	0.00	37,258.00
TOTAL MANAGED PORTFOLIO FUND INCOME	\$18,000.00	\$0.00	\$0.00	\$37,258.00
TOTAL INCOME				
<i>Contributions/Receipts</i>	<i>\$1,638,500.00</i>	<i>\$1,516,000.00</i>	<i>\$1,536,500.00</i>	<i>\$1,521,236.00</i>
<i>Interest and Dividends</i>	<i>582,500.00</i>	<i>549,000.00</i>	<i>565,500.00</i>	<i>610,408.00</i>
TOTAL 2008 INCOME	\$2,221,000.00	\$2,065,000.00	\$2,102,000.00	\$2,131,644.00
TRADITIONS – Capital Campaign				
Contributions	\$10,000,000.00	Pledges	\$0.00	\$90,485.00
Interest and Dividends	0.00		0.00	65.00
TOTAL TRADITIONS – PLEDGES/CONTRIBUTIONS	\$10,000,000.00	\$0.00	\$90,000.00	\$90,550.00

HELENA OFFICE INCOME

GENERAL SUPPORT	2009	2008	2008 Projected Year-End	2008 Actual Year-End
Foundations	\$320,000.00	\$300,000.00	\$300,000.00	\$505,599.00
Individuals	455,000.00	380,000.00	380,000.00	278,828.00
Land Projects/Stewardship	1,000.00	1,000.00	1,000.00	0.00
Receipts (book sales, miscellaneous)	1,000.00	1,000.00	1,000.00	2,850.00
Investment Income				
Operating Surplus				
Avg Balance \$500,000 @ 4.75%	12,500.00	20,000.00	14,000.00	15,223.00
Associate Supporters	1,000.00	1,000.00	1,000.00	335.00
Organizations/Corporations	25,000.00	25,000.00	30,000.00	34,257.00
TOTAL GENERAL SUPPORT	\$815,500.00	\$728,000.00	\$727,000.00	\$837,092.00

FLATHEAD OFFICE INCOME

GENERAL SUPPORT	2009	2008	2008 Projected Year-End	2008 Actual Year-End
Foundations	\$140,000.00	\$140,000.00	\$140,000.00	\$52,700.00
Individuals	130,000.00	100,000.00	100,000.00	78,708.00
Land Projects/Stewardship	10,000.00	10,000.00	10,000.00	4,000.00
Receipts (book sales, miscellaneous)	1,000.00	1,000.00	0.00	2,071.00
Art Auction	25,000.00	25,000.00	8,000.00	7,227.00
Associate Supporters	1,000.00	0.00	1,000.00	380.00
Organizations/Corporations	12,000.00	12,000.00	12,000.00	2,500.00
TOTAL GENERAL SUPPORT	\$319,000.00	\$288,000.00	\$271,000.00	\$147,586.00

EASTERN OFFICE INCOME

GENERAL SUPPORT	2009	2008	2008 Projected Year-End	2008 Actual Year-End
Foundations	\$15,000.00	\$20,000.00	\$15,000.00	\$8,200.00
Individuals	40,000.00	40,000.00	40,000.00	22,397.00
Land Projects/Stewardship	1,000.00	1,000.00	1,000.00	0.00
Receipts (book sales/misc)	0.00	1,000.00	0.00	152.00
Associate Supporters	500.00	0.00	500.00	0.00
Organizations/Corporations	10,000.00	8,000.00	9,000.00	140.00
TOTAL GENERAL SUPPORT	\$66,500.00	\$70,000.00	\$65,500.00	\$30,889.00

**ALL MLR OFFICES – HELENA, BIGFORK, BILLINGS
2009 EXPENSE BUDGET**

	2009	2008	2008 PROJ YEAR-END	2008 ACTUAL YEAR-END
SALARIES				
Base Salaries	\$849,272.47	\$799,946.15	\$788,418.15	\$775,934.13
Benefits	158,651.98	149,449.38	144,649.38	145,902.46
Payroll Taxes	77,023.61	73,514.94	73,514.94	70,564.00
Subtotal Salaries, Benefits & Payroll Taxes	\$1,084,948.05	\$1,022,910.47	\$1,006,582.47	\$992,400.59
LAND PROTECTION FUND (LPF)	(291,008.24)	(272,569.56)	(272,569.56)	(262,532.99)
GLACIER/FLATHEAD FUND (GFF)	(20,000.00)	(23,000.00)	(23,000.00)	(23,000.00)
EASTERN MONTANA FUND (EMF)	(40,000.00)	(35,000.00)	(35,000.00)	(35,000.00)
TOTAL SALARIES, BENEFITS & PAYROLL TAXES	\$733,939.82	\$692,340.91	\$676,012.91	\$671,867.60
OTHER EXPENSES				
Printing	\$18,000.00	\$19,250.00	\$13,600.00	\$10,700.00
Letterhead; Business Cards; Brochures; Newsletters; Etc.	EOF= (18,000.00)	EOF= (18,000.00)	(13,600.00)	(10,700.00)
Rent	45,800.00	44,650.00	41,755.00	41,497.00
Offices; Garage; PO/S/D Boxes; Meeting Rooms; Etc.				
Equipment	40,500.00	40,200.00	32,800.00	32,223.00
Vehicles; Copy Machines; Maintenance;	EOF= (5,000.00)	EOF= (5,000.00)	(5,000.00)	(5,000.00)
Miscellaneous Office; Mapping Software; Etc.				
Insurance/Licensing	22,150.00	22,700.00	17,410.00	17,068.00
Vehicle Licenses and Insurance; Office & Outfitting Insurance				
Telephone	34,000.00	34,500.00	30,400.00	30,307.00
Equipment; Internet Access; Long Distance Calls	EOF= (5,000.00)	EOF= (5,000.00)	(5,000.00)	(5,000.00)
Contract	131,750.00	112,250.00	87,900.00	77,772.00
Annual Report; Newsletter; Audit; Neighborhood Maps;	LPF= (31,000.00)	LPF= (28,500.00)	(28,500.00)	(24,000.00)
Webpage Update; Mineral Reports; Aerials; Agricultural	EOF= (49,000.00)	EOF= (44,000.00)	(44,000.00)	(44,000.00)
Outreach; 401k/Retirement Admin; Resource Reports				
Legal	31,500.00	30,400.00	27,425.00	21,324.00
Recordings; Legal Counsel; Copies (Legal Documents)	LPF = 0.00	LPF = (10,000.00)	(10,000.00)	(15,661.32)
Supplies/Postage	49,000.00	48,500.00	40,600.00	35,972.00
Office Supplies; Postage; Subscriptions/Memberships;				
Registrations				
Travel/Per Diem	91,500.00	89,500.00	82,750.00	84,069.00
Airfare; In-State/Out-of-State Travel; Outreach	EOF = (30,000.00)	EOF = (30,000.00)	(30,000.00)	(29,632.00)
	CONS (4,000.00)	CONS (4,000.00)	(4,000.00)	(4,000.00)
	GFF (10,000.00)	GFF (10,000.00)	(10,000.00)	(10,000.00)
Subtotal Other Expenses	\$464,200.00	\$441,950.00	\$374,640.00	\$350,932.00
LAND PROTECTION FUND	(31,000.00)	(38,500.00)	(38,500.00)	(39,661.32)
CONSERVATION FUND	(4,000.00)	(4,000.00)	(4,000.00)	(4,000.00)
GLACIER FLATHEAD FUND	(10,000.00)	(10,000.00)	(10,000.00)	(10,000.00)
EDUCATION & OUTREACH FUND	(107,000.00)	(102,000.00)	(97,600.00)	(94,332.00)
TOTAL OTHER EXPENSES	\$312,200.00	\$287,450.00	\$224,540.00	\$202,938.68
TOTAL SALARIES	\$733,939.82	\$692,340.91	\$676,012.91	\$671,867.60
TOTAL OTHER EXPENSES	312,200.00	287,450.00	224,540.00	202,938.68
2009 OPERATING EXPENSES	\$1,046,139.82	\$979,790.91	\$900,552.91	\$874,806.28

GENERAL SPECIAL EXPENSES	2009		2008		2008	2008
					PROJ YEAR-END	ACTUAL YEAR-END
Annual Meeting	Helena	\$10,000.00	Helena	\$7,500.00	\$8,500.00	\$8,390.00
Employee Gifts		0.00		0.00	0.00	3,690.00
Conservation Projects		0.00		0.00	0.00	0.00
Federal Legislation		10,000.00		10,000.00	5,000.00	3,720.00
MALT Participation		8,000.00		8,000.00	8,000.00	8,000.00
Uncollectible		10,000.00		0.00	10,800.00	14,275.00
509 (a)(3) Organization Work		500.00		1,000.00	6,000.00	5,844.00
Right-of-way Intervention - Legal		0.00		0.00	0.00	0.00
Salary/Benefits Survey		0.00		5,000.00	5,000.00	5,000.00
Employee Gifts	Bigfork	0.00	Bigfork	0.00	0.00	1,800.00
Office Remodel		0.00		1,500.00	980.00	978.00
Uncollectible		2,500.00		0.00	2,876.00	4,705.00
Employee Gifts	Billings	0.00	Billings	0.00	0.00	800.00
Uncollectible		1,000.00		0.00	760.00	1,105.00
TOTAL GENERAL SPECIAL EXPENSES		\$42,000.00		\$33,000.00	\$47,916.00	\$58,307.00

TOTAL EXPENSES – OPERATING & GENERAL SPECIAL EXPENSE

SALARIES	\$1,084,948.05	\$1,022,910.47	\$1,006,582.47	\$992,400.59
OTHER EXPENSES	464,200.00	441,950.00	374,640.00	350,932.00
GENERAL SPECIAL EXPENSES	42,000.00	33,000.00	47,916.00	58,307.00
Subtotal All Expenses	\$1,591,148.05	\$1,497,860.47	\$1,429,138.47	\$1,401,639.59
LAND PROTECTION FUND	(\$322,008.24)	(\$311,069.56)	(\$311,069.56)	(\$302,194.31)
CONSERVATION FUND	(4,000.00)	(4,000.00)	(4,000.00)	(4,000.00)
GLACIER/FLATHEAD FUND	(30,000.00)	(33,000.00)	(33,000.00)	(33,000.00)
EASTERN MONTANA FUND	(40,000.00)	(35,000.00)	(35,000.00)	(35,000.00)
EDUCATION & OUTREACH FUND	(107,000.00)	(102,000.00)	(97,600.00)	(94,332.00)
2009 GENERAL INCOME REQUIREMENT	\$1,088,139.82	\$1,012,790.91	\$948,468.91	\$937,113.28

TRADITIONS – Capital Campaign Special Expense

Salaries, benefits, payroll taxes	\$30,786.00	\$12,000.00	\$8,800.00	\$8,735.95
Operating expenses (equipment; telephone; contract, etc.)	55,300.00	55,000.00	36,450.00	22,324.12
TOTAL TRADITIONS SPECIAL EXPENSES	\$86,086.00	\$67,000.00	\$45,250.00	\$31,060.07
2009 TOTAL INCOME REQUIREMENT (W/TRADITIONS)	\$1,174,225.82	\$1,079,790.91	\$993,718.91	\$968,173.35

Total All Expenses	1,677,234.05	1,564,860.47	1,474,388.47	1,432,699.66
Less Reimbursements	(503,008.24)	(485,069.56)	(480,669.56)	(468,526.31)
	1,174,225.82	1,079,790.91	993,718.91	964,173.35

HELENA OFFICE
2009 EXPENSE BUDGET

	2009	2008	2008 PROJ YEAR-END	2008 ACTUAL YEAR-END
SALARIES & BENEFITS				
Base Salaries	\$581,047.90	\$547,326.23	\$538,062.23	521,354.13
Benefits	105,469.47	97,866.67	93,066.67	97,877.09
Payroll Taxes	52,890.50	50,848.67	50,848.67	46,700.12
<i>Subtotal Salaries, Benefits, Payroll Taxes</i>	\$739,407.87	\$696,041.57	\$681,977.57	\$665,931.34
LAND PROTECTION FUND	(\$203,406.86)	(\$190,504.34)	(\$190,504.34)	(\$178,763.88)
TOTAL SALARIES, BENEFITS & PAYROLL TAXES	\$536,001.01	\$505,537.23	\$491,473.23	\$487,167.46
OTHER EXPENSES				
Printing	\$13,000.00	\$14,000.00	\$10,600.00	\$8,892.00
EOF=	(13,000.00)	EOF= (14,000.00)	(10,600.00)	(8,892.00)
Rent	27,000.00	26,100.00	24,850.00	25,080.00
Equipment	28,000.00	28,000.00	22,300.00	20,491.00
EOF =	(5,000.00)	EOF = (5,000.00)	(5,000.00)	(5,000.00)
Insurance/Licensing	16,500.00	17,000.00	12,725.00	12,541.00
Telephone	16,000.00	16,500.00	14,300.00	15,163.00
EOF =	(5,000.00)	EOF = (5,000.00)	(5,000.00)	(5,000.00)
Contract	130,500.00	110,500.00	86,900.00	77,049.00
LPF=	(31,000.00)	LPF= (28,500.00)	(28,500.00)	(24,000.00)
EOF=	(49,000.00)	EOF= (44,000.00)	(44,000.00)	(44,000.00)
Legal	26,000.00	25,000.00	23,200.00	18,435.00
LPF =	0.00	LPF= (10,000.00)	(10,000.00)	(15,661.32)
Supplies/Postage	36,000.00	36,000.00	29,250.00	26,006.00
Travel/Per Diem	56,500.00	54,500.00	52,000.00	56,286.00
EOF =	(12,000.00)	EOF = (12,000.00)	(12,000.00)	(12,000.00)
CONS =	(4,000.00)	CONS = (4,000.00)	(4,000.00)	(4,000.00)
<i>Subtotal Other</i>	\$349,500.00	\$327,600.00	\$276,125.00	\$259,943.00
LAND PROTECTION FUND	(\$31,000.00)	(\$38,500.00)	(\$38,500.00)	(39,661.32)
CONSERVATION FUND	(4,000.00)	(4,000.00)	(4,000.00)	(4,000.00)
EDUCATION & OUTREACH FUND	(84,000.00)	(80,000.00)	(76,600.00)	(74,892.00)
TOTAL OTHER EXPENSES	\$230,500.00	\$205,100.00	\$157,025.00	\$141,389.68
TOTAL SALARIES	\$536,001.01	\$505,537.23	\$491,473.23	\$487,167.46
TOTAL OTHER EXPENSES	230,500.00	205,100.00	157,025.00	141,389.68
2009 OPERATING EXPENSES	\$766,501.01	\$710,637.23	\$648,498.23	\$628,557.14
SPECIAL EXPENSES				
Annual Meeting	\$10,000.00	\$7,500.00	\$8,500.00	\$8,390.00
Employee Gifts	0.00	0.00	0.00	3,690.00
Conservation Projects	0.00	0.00	0.00	0.00
Federal Legislation	10,000.00	10,000.00	5,000.00	3,720.00
MALT Participation	8,000.00	8,000.00	8,000.00	8,000.00
Uncollectible	10,000.00	0.00	10,800.00	14,275.00
509 (a)(3) Organization Work	500.00	1,000.00	6,000.00	5,844.00
Right-of-way Intervention - Legal	0.00	0.00	0.00	0.00
Salary/Benefits Survey	0.00	5,000.00	5,000.00	5,000.00
TOTAL SPECIAL EXPENSES	\$38,500.00	\$31,500.00	\$43,300.00	\$48,919.00

TOTAL EXPENSES – OPERATING & SPECIAL

SALARIES	\$739,407.87	\$696,041.57	\$681,977.57	\$665,931.34
OTHER EXPENSES	349,500.00	327,600.00	276,125.00	259,943.00
SPECIAL EXPENSES	38,500.00	31,500.00	43,300.00	48,919.00
Subtotal All Expenses	\$1,127,407.87	\$1,055,141.57	\$1,001,402.57	\$974,793.34
LAND PROTECTION FUND	(\$234,406.86)	(\$229,004.34)	(\$229,004.34)	(\$218,425.20)
CONSERVATION FUND	(4,000.00)	(4,000.00)	(4,000.00)	(4,000.00)
EDUCATION & OUTREACH FUND	(84,000.00)	(80,000.00)	(76,600.00)	(74,892.00)
2009 GENERAL INCOME REQUIREMENT	\$805,001.01	\$742,137.23	\$691,798.23	\$677,476.14

TRADITIONS – Capital Campaign Special Expense

Salaries & Benefits	\$30,786.00	\$12,000.00	8,800.00	8,735.95
Equipment	1,000.00	1,500.00	1,500.00	1,249.00
Telephone	1,800.00	1,300.00	800.00	371.40
Contract				
Campaign packets (design/print)	1,000.00	11,000.00	11,000.00	
Articles (Clay Scott writing)	0.00	5,000.00	5,000.00	
Technology Updates (webpage, etc.)	0.00	5,000.00	0.00	
Advertisements (local MT magazines)	0.00	5,000.00	0.00	
Coordinator Training	500.00	3,000.00	0.00	
	1,500.00	29,000.00	16,000.00	16,450.03
Supplies/Postage	1,000.00	1,200.00	150.00	388.36
Travel/Per Diem	50,000.00	22,000.00	18,000.00	3,865.33
	\$86,086.00	\$67,000.00	\$45,250.00	\$31,060.07
2009 TOTAL INCOME REQUIREMENT	\$891,087.01	\$809,137.23	\$737,048.23	\$708,536.21

FLATHEAD OFFICE
2009 EXPENSE BUDGET

	2009	2008	2008 PROJ YEAR-END	2008 ACTUAL YEAR-END
SALARIES				
Base Salaries	\$186,219.63	\$175,420.48	\$175,371.48	\$178,618.30
Benefits	37,249.64	36,128.58	36,128.58	32,509.95
Payroll Taxes	16,640.64	15,625.52	15,625.52	16,775.80
Subtotal Salaries, Benefits & Payroll Taxes	\$240,109.91	\$227,174.58	\$227,125.58	\$227,904.05
LAND PROTECTION FUND	(77,502.66)	(72,859.21)	(72,859.21)	(76,457.24)
GLACIER/FLATHEAD FUND	(20,000.00)	(23,000.00)	(23,000.00)	(23,000.00)
TOTAL SALARIES, BENEFITS & PAYROLL TAXES	\$142,607.25	\$131,315.37	\$131,266.37	\$128,446.81
OTHER EXPENSES				
Printing	\$4,000.00	\$4,250.00	\$2,400.00	\$1,670.00
EOF=	(4,000.00)	(3,000.00)	(2,400.00)	(1,670.00)
Rent/Utilities	12,000.00	12,050.00	10,550.00	10,145.00
Equipment	8,000.00	8,000.00	6,400.00	7,008.00
Insurance/Licensing	3,750.00	4,000.00	3,210.00	3,082.00
Telephone	12,500.00	12,500.00	11,500.00	10,563.00
Contract	1,000.00	1,500.00	900.00	678.00
Legal	3,000.00	2,900.00	2,525.00	2,000.00
Supplies/Postage	9,000.00	9,000.00	8,000.00	7,609.00
Travel/Per Diem	21,000.00	22,000.00	18,500.00	18,151.00
EOF =	(8,000.00)	(8,000.00)	(8,000.00)	(8,000.00)
GFF =	(10,000.00)	(10,000.00)	(10,000.00)	(10,000.00)
Subtotal Other Expenses	\$74,250.00	\$76,200.00	\$63,985.00	\$60,906.00
EDUCATION & OUTREACH FUND	(12,000.00)	(11,000.00)	(10,400.00)	(9,670.00)
GLACIER/FLATHEAD FUND	(10,000.00)	(10,000.00)	(10,000.00)	(10,000.00)
TOTAL OTHER EXPENSES	\$52,250.00	\$55,200.00	\$43,585.00	\$41,236.00
TOTAL SALARIES	\$142,607.25	\$131,315.37	\$131,266.37	\$128,446.81
TOTAL OTHER EXPENSES	\$52,250.00	\$55,200.00	\$43,585.00	\$41,236.00
2009 OPERATING EXPENSE	\$194,857.25	\$186,515.37	\$174,851.37	\$169,682.81
SPECIAL EXPENSES				
Employee Gifts	\$0.00	\$0.00	\$0.00	1,800.00
Office Remodel	0.00	1,500.00	980.00	978.00
Uncollectible	2,500.00	0.00	2,876.00	4,705.00
TOTAL SPECIAL EXPENSES	\$2,500.00	\$1,500.00	\$3,856.00	\$7,483.00
TOTAL EXPENSES – OPERATING & SPECIAL				
SALARIES	\$240,109.91	\$227,174.58	\$227,125.58	\$227,904.05
OTHER EXPENSES	74,250.00	76,200.00	63,985.00	60,906.00
SPECIAL EXPENSES	2,500.00	1,500.00	3,856.00	7,483.00
Subtotal All Expenses	\$316,859.91	\$304,874.58	\$294,966.58	\$296,293.05
LAND PROTECTION FUND	(77,502.66)	(72,859.21)	(72,859.21)	(76,457.24)
GLACIER/FLATHEAD FUND	(30,000.00)	(33,000.00)	(33,000.00)	(33,000.00)
EDUCATION & OUTREACH FUND	(12,000.00)	(11,000.00)	(10,400.00)	(9,670.00)
2009 INCOME REQUIREMENT	\$197,357.25	\$188,015.37	\$178,707.37	\$177,165.81

EASTERN OFFICE
2009 EXPENSE BUDGET

	2009	2008	2008 PROJ YEAR-END	2008 ACTUAL YEAR-END
SALARIES				
Base Salaries	\$82,004.94	\$77,199.44	\$74,984.44	\$75,961.70
Benefits	15,932.87	15,454.13	15,454.13	15,515.42
Payroll Taxes	7,492.46	7,040.75	7,040.75	7,088.08
<i>Subtotal Salaries, Benefits & Payroll Taxes</i>	\$105,430.27	\$99,694.32	\$97,479.32	\$98,565.20
LAND PROTECTION FUND	(10,098.71)	(9,206.01)	(9,206.01)	(7,311.87)
EASTERN MONTANA FUND	(40,000.00)	(35,000.00)	(35,000.00)	(35,000.00)
TOTAL SALARIES, BENEFITS & PAYROLL TAXES	\$55,331.56	\$55,488.31	\$53,273.31	\$56,253.33
OTHER EXPENSES				
Printing	\$1,000.00	\$1,000.00	\$600.00	\$138.00
EOF=	(1,000.00)	(1,000.00)	(600.00)	(138.00)
Rent	6,800.00	6,500.00	6,355.00	6,272.00
Equipment	4,500.00	4,200.00	4,100.00	4,724.00
Insurance/Licensing	1,900.00	1,700.00	1,475.00	1,445.00
Telephone	5,500.00	5,500.00	4,600.00	4,581.00
Contract	250.00	250.00	100.00	45.00
Legal	2,500.00	2,500.00	1,700.00	889.00
Supplies/Postage	4,000.00	3,500.00	3,350.00	2,357.00
Travel/Per Diem	14,000.00	13,000.00	12,250.00	9,632.00
EOF =	(10,000.00)	(10,000.00)	(10,000.00)	(9,632.00)
<i>Subtotal Other Expenses</i>	\$40,450.00	\$38,150.00	\$34,530.00	\$30,083.00
EDUCATION & OUTREACH FUND	(11,000.00)	(11,000.00)	(10,600.00)	(9,770.00)
TOTAL OTHER EXPENSES	\$29,450.00	\$27,150.00	\$23,930.00	\$20,313.00
TOTAL SALARIES	\$55,331.56	\$55,488.31	\$53,273.31	\$56,253.33
TOTAL OTHER EXPENSES	29,450.00	27,150.00	23,930.00	20,313.00
2009 OPERATING EXPENSES	\$84,781.56	\$82,638.31	\$77,203.31	\$76,566.33
SPECIAL EXPENSES				
Employee Gifts	\$0.00	\$0.00	\$0.00	\$800.00
Uncollectibles	1,000.00	0.00	760.00	1,105.00
TOTAL SPECIAL EXPENSES	\$1,000.00	\$0.00	\$760.00	\$1,905.00
TOTAL EXPENSES – OPERATING & SPECIAL				
SALARIES	\$105,430.27	\$99,694.32	\$97,479.32	\$98,565.20
OTHER EXPENSES	40,450.00	38,150.00	34,530.00	30,083.00
SPECIAL EXPENSES	1,000.00	0.00	760.00	1,905.00
<i>Subtotal All Expenses</i>	\$146,880.27	\$137,844.32	\$132,769.32	\$130,553.20
LAND PROTECTION FUND	(10,098.71)	(9,206.01)	(9,206.01)	(7,311.87)
EDUCATION & OUTREACH FUND	(11,000.00)	(11,000.00)	(10,600.00)	(9,770.00)
EASTERN MONTANA FUND	(40,000.00)	(35,000.00)	(35,000.00)	(35,000.00)
2009 INCOME REQUIREMENT	\$85,781.56	\$82,638.31	\$77,963.31	\$78,471.33

HEAD OFFICE
EASTERN DISTRICT
NEW SOUTH WALES

DATE	DESCRIPTION	AMOUNT	CREDIT	DEBIT	BALANCE	REMARKS
1911.12.31	Balance forward				100.00	
1912.01.01	Income	100.00			200.00	
1912.01.15	Expenses		50.00		150.00	
1912.02.01	Income	50.00			200.00	
1912.02.15	Expenses		25.00		175.00	
1912.03.01	Income	25.00			200.00	
1912.03.15	Expenses		10.00		190.00	
1912.03.31	Income	10.00			200.00	
1912.04.01	Expenses		10.00		190.00	
1912.04.15	Income	10.00			200.00	
1912.04.30	Expenses		10.00		190.00	
1912.05.01	Income	10.00			200.00	
1912.05.15	Expenses		10.00		190.00	
1912.05.31	Income	10.00			200.00	
1912.06.01	Expenses		10.00		190.00	
1912.06.15	Income	10.00			200.00	
1912.06.30	Expenses		10.00		190.00	
1912.07.01	Income	10.00			200.00	
1912.07.15	Expenses		10.00		190.00	
1912.07.31	Income	10.00			200.00	
1912.08.01	Expenses		10.00		190.00	
1912.08.15	Income	10.00			200.00	
1912.08.31	Expenses		10.00		190.00	
1912.09.01	Income	10.00			200.00	
1912.09.15	Expenses		10.00		190.00	
1912.09.30	Income	10.00			200.00	
1912.10.01	Expenses		10.00		190.00	
1912.10.15	Income	10.00			200.00	
1912.10.31	Expenses		10.00		190.00	
1912.11.01	Income	10.00			200.00	
1912.11.15	Expenses		10.00		190.00	
1912.11.30	Income	10.00			200.00	
1912.12.01	Expenses		10.00		190.00	
1912.12.15	Income	10.00			200.00	
1912.12.31	Expenses		10.00		190.00	
1913.01.01	Income	10.00			200.00	
1913.01.15	Expenses		10.00		190.00	
1913.01.31	Income	10.00			200.00	
1913.02.01	Expenses		10.00		190.00	
1913.02.15	Income	10.00			200.00	
1913.02.28	Expenses		10.00		190.00	
1913.03.01	Income	10.00			200.00	
1913.03.15	Expenses		10.00		190.00	
1913.03.31	Income	10.00			200.00	
1913.04.01	Expenses		10.00		190.00	
1913.04.15	Income	10.00			200.00	
1913.04.30	Expenses		10.00		190.00	
1913.05.01	Income	10.00			200.00	
1913.05.15	Expenses		10.00		190.00	
1913.05.31	Income	10.00			200.00	
1913.06.01	Expenses		10.00		190.00	
1913.06.15	Income	10.00			200.00	
1913.06.30	Expenses		10.00		190.00	
1913.07.01	Income	10.00			200.00	
1913.07.15	Expenses		10.00		190.00	
1913.07.31	Income	10.00			200.00	
1913.08.01	Expenses		10.00		190.00	
1913.08.15	Income	10.00			200.00	
1913.08.31	Expenses		10.00		190.00	
1913.09.01	Income	10.00			200.00	
1913.09.15	Expenses		10.00		190.00	
1913.09.30	Income	10.00			200.00	
1913.10.01	Expenses		10.00		190.00	
1913.10.15	Income	10.00			200.00	
1913.10.31	Expenses		10.00		190.00	
1913.11.01	Income	10.00			200.00	
1913.11.15	Expenses		10.00		190.00	
1913.11.30	Income	10.00			200.00	
1913.12.01	Expenses		10.00		190.00	
1913.12.15	Income	10.00			200.00	
1913.12.31	Expenses		10.00		190.00	

