

Dear Friends,

I don't have to tell you what a challenging year 2020 was. Perhaps like me sometimes you feel worn out and heartbroken over the loss of life, increasingly obvious structural inequities, and hostility in our public sphere that impedes our ability to work together across divides.

Here at LegacyWorks Group, these challenges have reinforced our belief that the change we need begins by working in common cause on things that matter to all of us. We believe we can achieve big things when we work together at the community scale. We can mitigate and adapt to climate change, restore and conserve our land and water, and build community resilience in ways that make things better for everyone. Through collaborative initiatives like those described in this report, we show each other the way forward to a far brighter world.

I am full of hope as I write this because our team is making this happen with many partners across multiple regions. We are thrilled to share this annual report to give you a glimpse into our work. With your support we're finding big impact opportunities everywhere we work and making great strides toward that brighter future together. We look forward to achieving even more together in the year ahead!

With deep gratitude,

CARL PALMER

Carl Palmer
Founder and Executive Director



Our Work

Our programs in Baja California Sur, Santa Barbara, and the Tetons identify and advance high impact opportunities that meet critical community needs and build capacity to do more. Our work focuses on an array of topical areas and is fundamentally place-based. See more projects in each of these categories at legacyworksgroup.com.



Climate Action



Community Resilience



Marine and Terrestrial Conservation



Migrations



Land Food and Agriculture



Market Based Solutions



Sustainable Development



Water

Our Collaborative Impact Model

CULTIVATE COLLABORATION

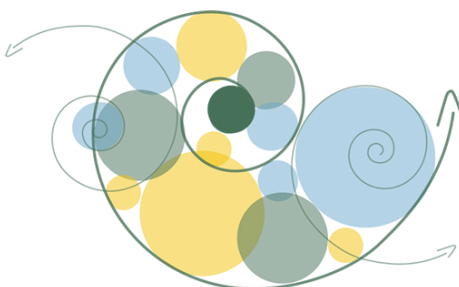
We facilitate collaboration, expand leadership and build collective capacity.

ADVANCE INITIATIVES

We work and learn experientially advancing top priority projects with tangible results.

MOBILIZE RESOURCES

We engage full spectrum capital and activate each community's talent and potential.



LegacyWorks Group helps communities come together to collaborate on critical challenges that no single organization can take on themselves. Each collaborative success builds momentum, courage and capacity to address increasingly complex opportunities. This process unfolds as a continuously expanding spiral of activity that strengthens collaboration, empowers community leadership and builds capacity. The spiral represents an emergent strategy and actionable pathway to the BIG change we need. LegacyWorks enables communities to travel those pathways to overcome their greatest challenges and achieve their aspirations.

In **Baja California Sur** we are forging a new model of coastal development in the Cabo del Este region. Our goal is to catalyze an economy and society that protects and conserves terrestrial and marine ecosystems by building on the region's significant rural values and community leadership. We work with local and international partners to help communities protect their unique and valuable ecosystems, build local leadership capacity and create aligned economic development opportunities. We believe that the power of collaboration exponentially advances causes and we are leveraging these relationships wherever we can along the East Cape to meet community goals.

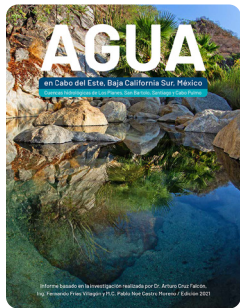
Boca del Alamo: In the Boca del Alamo - Punta Pescadero corridor, we are facilitating a community-wide collaborative effort to assess the potential for a new marine protected area with the aim of extending protection, reducing fishing pressure and equitably distributing interest in restored marine ecosystems. We are actively building trust with leaders in the fishing community to support conservation action in water and on land to achieve these goals. This year we secured formal support from the leaders of two fishing cooperatives, as well as from the region's mayor. We then conducted the first rapid inventory of reef resources, determining that the area harbors

2020 Highlights

Water Study: LegacyWorks has charted new terrain in Cabo del Este with the publication of its Citizens' Water Report. This project, co-directed with the Baja Coastal Institute (BCI), details the current and projected future state of water in the region. The report is now the basis for our efforts to mobilize regional water solutions and for BCI's engagement with regional schools. We are systematically presenting the report to key decision-makers to provide clear information



a coral reef system that is large and healthy, although lacking diversity and biomass due to current fishing activity (see [summary video](#)). We have also created educational resources to share information about three primary conservation strategies for



on available water, future projections, and potential solutions such as surface water harvest, groundwater recharge, metering, infrastructure, and desalination. The presentations establish LegacyWorks as a trusted convener on water issues and catalyze citizen demand for solutions that balance development with ecosystem limits.

reef protection and sustainable use: Natural Protected Areas (like Cabo Pulmo), fish refuges (no-take zones), and fishery improvement programs (FIPs). These tools will be used to help Boca del Alamo design its own protection programs. With the International Community Foundation, we are leading a group of conservationists and scientists in developing a strategy for coordinated conservation action in the area. Boca del Alamo will serve as a test site for other communities to learn with low risk and rapidly carry impact to a regional scale.

2020 Revenue \$680,479 (all regions)

Partner Allocations 8%

Pass Through \$56,771

Other 1%

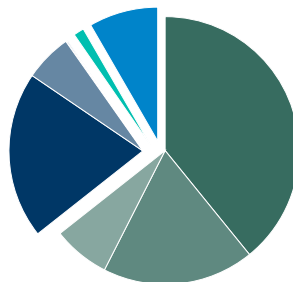
Misc. Income & Interest \$8,632

Fee for Service 26%

Government Agencies \$137,025

Nonprofits \$39,021

Businesses \$1,000



Grants and Donations 64%

Foundations \$266,420

Individuals and Businesses \$124,773

Government Agencies \$46,837 (includes PPP)

Teton LegacyWorks enables landscape scale conservation and climate action in the Teton Region and Greater Yellowstone Ecosystem, focusing on large-scale collaborative initiatives outside the reach of any single organization. These regionally significant catalytic projects are developing into models for solving pressing conservation challenges. This year we welcomed the new Teton Region Director, Tony Ferlisi, and new Senior Regional Director, Dr. Doug Wachob, formerly interim dean of the University of Wyoming Haub School. We're both looking ahead and celebrating the great progress we have made on our collaborative projects and partnerships throughout the southern and now eastern Greater Yellowstone Ecosystem.



2020 Highlights

Water: In the Tetons we facilitate an array of initiatives focused on water, the resource that drives conservation and community resilience more than any other. We are in the third year of a successful collaboration between conservation organizations and multi-generation farmers to create a Groundwater Recharge Market that is beginning to replenish the Teton Basin aquifer and boost late-season flows in the Teton River. We're also growing our Upper Snake Farms and Fish initiative, working with local barley growers, malters and brewers to expand certification for practices that benefit water quality. Finally, the Trout Friendly Lawns certification is expanding into a sustainable market, with nearly two-dozen local landscaping companies committed to practices that improve water quality in Fish and Flat Creeks.

Wildlife Migrations: We are facilitating the formation of a new regional working group focused on collaborating with private landowners across the Absaroka Front to achieve landscape scale conservation outcomes. The group envisions a well

stewarded landscape that supports healthy wildlife populations and ranching operations for generations to come. We are setting out to achieve habitat connectivity and restoration at a large scale through a collaborative approach that works with landowners to achieve their stewardship goals.

Elk Occupancy: LegacyWorks and the Greater Yellowstone Coalition are pioneering innovative, landowner driven solutions to mitigating wildlife conflicts. We are working to expand last year's successful work in the Jackson Hole area to reduce disease transmission and conflicts between cattle and resident wintering elk in innovative ways that meet landowner needs – including the first elk occupancy agreement with the ranch family quoted below.

"I cannot express how grateful we are to LWG for the assistance with wintering our cattle in Crowheart, and for us to be able to keep doing what we do without the added stress of conflict and expense."

– Wyoming ranch participant, Elk Occupancy Program

2020 Expenses \$615,842 (all regions)

Partner Allocations 14%

■ Pass Through \$88,372

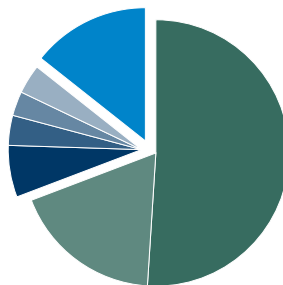
Other 16%

■ Service Providers (tax, accounting, legal) \$38,729

■ Facilities \$22,400

■ Travel \$18,207

■ Administrative Costs \$21,836



Program Personnel 69%

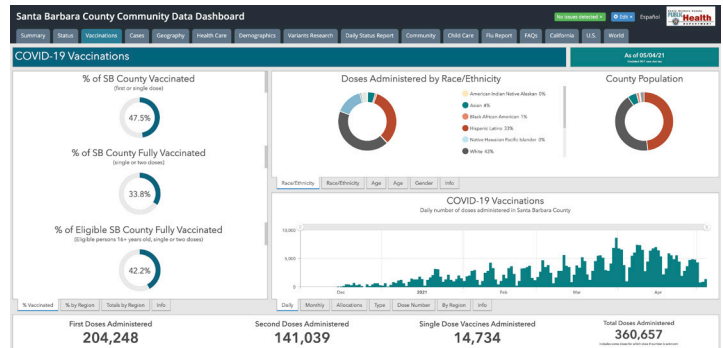
■ Salary Employees \$314,155

■ Team Contractors \$112,143

In **Santa Barbara** we promote whole-systems solutions that are integrative, facilitative, trust-based, and place-based. This hands-on work takes the shape of facilitation, project design, network creation, leadership development, strategy development, and innovative financing. Our work in Santa Barbara spans a breadth of impact areas, with emphasis on community resilience and climate action.

2020 Highlights

Community Data Dashboard: This year we facilitated a successful public-private partnership to build a comprehensive countywide data dashboard in response to the pandemic (sbcdashboard.org). We convened a wide array of partners and a steering committee made up of public health experts and community leaders to guide the dashboard development. The dashboard includes interactive data charts, gauges and maps for viewers to explore top priority epidemic and community impact data by place, time period and demography alongside quality interpretative information in a mix of visual and narrative forms. It keeps the community up to date on the evolving pandemic and enables data driven policy and mitigation decisions. The dashboard continues to expand to include data on vaccines, variants, child care and a range of community data. We plan to expand the dashboard's coverage of other key community impact areas including food security, education, housing, water quality and air quality.



"In order to confront the COVID-19 crisis, Santa Barbara County residents and leaders need timely access to trustworthy data to make data-driven decisions. This public-private partnership brought together key agencies and organizations to meet this critical need by building an open and transparent collaborative data portal that builds upon everyone's good work to date."

– Supervisor Gregg Hart,
Chair, Santa Barbara County Board of Supervisors

Climate Resilience Roundtables: We recently finished the facilitation of a series of six climate resilience roundtables in partnership with the series host, the Community Environmental Council. Together we convened community leaders and stakeholders to identify tangible ways to build climate resilience, identifying over 700 ideas and 50 priority projects spanning all sectors and fields. The Roundtable series has been lauded for changing the tenor of climate action engagement in the community, setting us up for far more collaborative approaches to the critical work ahead.

Conservation Loan Fund: Over the past year and a half, LegacyWorks Group arranged bridge financing for four conservation transactions, matching conservation-minded investors with land trusts who needed low-cost financing for property acquisitions. We recently closed a \$1 million bridge loan for White Buffalo Land Trust's acquisition of Jalama Canyon Ranch. This work builds on our nearly 20 years of experience developing innovative impact investment models to get more capital flowing to conservation and community impact. We look forward to structuring and financing more land conservation transactions, and we are in the early stages of designing a conservation loan fund for this purpose. This will most likely take the form of a series of regional funds created in collaboration with local land trusts, enabling investors to deploy their capital to achieve conservation, climate action, restoration and regenerative agriculture goals in their regions.

