



Willowsford[®]
CONSERVANCY



Board of Trustees Meeting

September 15, 2026

5:30 to 7:30 pm

Boat House/
Zoom





Agenda

- Welcome & Public Comments
- Board Business
- Old Business
- New Business
- Staff Updates
- Finance Committee Update
- Executive Session

Opening & Board Business

- Public Comment
 - Two minutes per speaker
- Approval of 5/19/26 Meeting Minutes
- Approval of Agenda

Old Business

- Update on Grants
- Loudoun County Property Tax Exemption Application Update
- Ten Year Land Management Plan Update
- Vote on Graphic Standards Manual

Grant Application Tracker

APPLYING	2	Future Harvest Van Huyck Chockley/Loudoun Cemetery Conservancy	N/A
APPROVED	4	New: Van Huyck Chockley Conservation Grant (\$5k) New: Loudoun County Human Services Nonprofit (\$5k) Loudoun County ISPMP Grant (LIRA) (\$50k) Google Nonprofit Ad Grant (\$10k/month, renewable)	\$70,000
PENDING	2	New: Virginia DOF Urban & Community Forestry Grant Program Department of Forestry (\$43,153- applied 8/20) New: Dominion Energy Charitable Foundation (\$13,426 – applied 9/11)	\$56,579
DENIED	2	Recent: People's Bank and Virginia Farmer's Bureau	\$133,244

Loudoun County Property Tax Exemption

- Board approved Conservancy applying for relief from county real estate/personal property tax for non-profits in January
- Conservancy staff submitted application for Exemption by Designation in late March
- Potential savings to Conservancy budget = ~\$55k/year
- Application presented to the Finance/Government Operations and Economic Development Committee (FGOEDC) on Tuesday, June 9th
- FGOEDC did not recommend Conservancy application be considered by Board of Supervisors

Ten Year Land Management Plan

- **Forests** (Sam/Taryn): Reviewed by subject-matter expert (SME); ready for review
- **Grassland & Meadows** (Sam): Reviewed by SME. Recommendations are also being updated to incorporate findings from the vegetative survey completed by our summer interns
- **Water Resources & Wetlands** (Blake/Andrew): Currently undergoing SME review
- **Wildlife Habitat** (Karsten): Building upon Wildlife Survey Report, with an outline **planned in late fall**.

New Ten Year Land Management Plan will replace 2017 Conservation Plan

Land management is the intentional stewardship of natural resources to protect ecological health, biodiversity, water quality, and the long-term resilience of Conservancy lands.

Update to Graphic Standards Manual

- Updates to 2019 Manual include:
 - No changes to Conservancy logo colors.
Added dark olive for Farm
 - Additional colors added to palette for farm marketing (two Agrihood Campaigns)
 - Additional fonts added
 - Native Plant Nursery logo design
- HOA Approval received in June
- *Board Action: Adopt updated manual*



Graphic Standards Manual

2026

New Business

- Wine Down for a Cause
- Willowsford 101
- Strategic Plan Update
- Community Survey Summary

Strategic Plan Update

- CAC Working Group and board members (Gail, Leah, and Karyn) will work with staff on updating the 2023-26 Strategic Plan
- **Timeline:**
 - Sept-Oct: Assess implementation success against existing plan, review survey data and recommendations, solicit focus group participation
 - Nov-Dec: hold focus groups and board/staff retreat (facilitator), seek pro bono On Demand assistance for key questions
 - Jan-Feb: complete draft for feedback, revise plan
 - March: adopt updated strategic plan

Wine Down for a Cause

- Co-hosted again with STROLL
- Net proceeds will enable the Farm to donate produce to DSFP
- Tastings from 8 wineries
- Silent auction (still accepting items!)
- Family friendly, live music, food trucks and Farm Stand offerings
- Early Bird Tickets sales ends 9/27
- Event-day volunteers needed

THURSDAY, OCTOBER 1

5:30-7 PM

Willowsford Farm Stand



- **Thursday, Sept. 17, 6:00-8:00 PM**
- @ Sycamore House
- Opportunity for new residents to learn about all that Conservancy and HOA offer to the community
- Networking style event
- Various stations featuring staff, board members, and clubs
- *Conservancy Board and CAC Members invited to attend and serve at our stations*

Willowsford 101



Community Survey Summary

Staff Updates

- Land Stewardship
- Farm
- Programs/Communications
- Operations

Land Stewardship

- Q3 Program Updates (Pond Management)
 - 2027 Annual plan and budget
 - Water Quality testing / treatments
 - Allen Farm pond – dam survey
 - Lotus Pond Solar aerator Installation
 - Dredging plan for Lotus pond



Land Stewardship

Q3 Program Updates (Wildlife and Habitat)

- 2027 Annual plan and budget
- Salt Watch / Stream Monitoring
- Wildlife Camera Survey
- Monarch Butterfly release
- Amphibian / Frog Watch
- Wrapped up Bluebird Nest Box Monitoring (176 birds fledged)
- Selected 2026-27 Deer Management Program hunters and planned for mentor pilot project (two residents selected as mentees)



Land Stewardship

Q3 Program Updates (Grassland and Meadows)

- Completed the 2027 Annual plan and budget
- Vegetative Surveys - Summer Interns
- Volunteer - treatment Site Inspection and retreat
- In-house - Meadow treatment
- County IPSMP Grant (LIRA)
 - Meadow treatment and site prep
 - Forest spot spraying



Trail Conditions: Concerns & Resident Feedback

- **Mowing:** Residents have raised concerns about delayed mowing and missed grass sections along portions of the trail system. *(DTE Contract only covers mowing)*
- **Vegetation Overgrowth:** Fast-growing brambles, vines, and other vegetation can quickly encroach on trails posing challenges for hikers and bikers.
- **Loose Aggregate:** Concerns about loose gravel and aggregate affecting trail usability especially for bikers and runners in some areas.
- **Trail Erosion & Unauthorized Use:** Erosion is affecting portions of the trail system and can worsen after heavy rain and storm events. Residents have also raised concerns about unauthorized ATV and e-bike use and the potential for additional trail surface damage, erosion, and user conflicts.
- **Bridges & Trail Features:** Storms and high-water events can significantly affect bridges, crossings, boardwalks, and other constructed trail features.

Trail Maintenance: Actions Underway

- **Mowing Oversight:** DTE's contract covers grass sections of trail only. Staff are working directly with DTE management on weekly performance improvements and addressing missed locations or concerns immediately when reported.
- **Vegetation Clearing:** Bramble and woody vegetation management is handled by Conservancy Rangers with volunteer support and is separate from the mowing contract.
- **Additional Staff Capacity:** Elizabeth, our new full-time seasonal Trail Technician/Ranger, started September 14 and will provide dedicated capacity for trail maintenance, vegetation clearing, and repair work.

Resident Engagement & Trail Stewardship

- **Volunteer Stewardship:** Adopt a Trail gives residents a hands-on way to take an active role in trail stewardship, support routine maintenance, and report issues.
- **Issue Reporting:** Residents are encouraged to use the Report a Concern form on the website and provide photos/ exact locations so staff can identify and respond to issues efficiently.
- **Community Input:** Staff are holding a resident trail feedback session with the Mountain Biking Club to help identify priorities and practical solutions.

Adopt a Trail

With over 40 miles of scenic trails winding through our beautiful natural areas, keeping them well-maintained is no small feat and we need your help! Our Adopt-a-Trail Volunteer Program is a great way for individuals, families, community groups to get involved. When you sign up, you'll "adopt" one of our trails for a month of your choosing. During that time, you'll be responsible for walking your assigned trail at least once, helping to care for it by cutting back vegetation, pulling invasives, picking up trash, and reporting trail infrastructure problems to our Land Stewardship team.

Together, we can ensure that our trails remain a safe, beautiful, and accessible part of life in Willowsford. Whether you're a long-time resident or new to the neighborhood, we welcome your support and stewardship. Ready to get started? Sign up today to adopt your favorite trail and become a part of our growing team of volunteers working together to keep Willowsford beautiful!

Adopt a Trail: The
Grant



Adopt a Trail: The
Greens

Adopt a Trail: The
Grove

Trail Improvement Projects & Challenges

- **Storm & Weather Impacts:** Heavy rains and flooding can quickly damage trails, bridges, boardwalks, etc.,
- **Repairs & Replacement:** Staff address localized repairs while planning replacement of aging or significantly damaged trail infrastructure, including projects identified in the Reserve Study.
- **Materials & Construction:** Marine-grade and other durable, weather-resistant materials often must be custom ordered due to limited protected storage, while larger or more complex projects may require outside contractors.



Grove – Bridge repair



Grant – New pedestrian bridge



Grange – Boardwalk redecking

Key Accomplishments

- Onboarding strong team
- Listened to feedback/aimed to bring new crops to community
- Strong volunteer engagement – core programs and new harvest opportunities as well as sessions to spruce up Farm Stand (paint jobs, weeding)
- Rolled out pilot and built system to allow customers to use Custom Credits at Farm Stands
- Annual organic certification inspection successful!

Sales Trends

- Meat sales doubled from last year
- Fruit sales on target in spite of frost impacts to Beechwood
- Farm Stand sales in both locations outperformed last year
- Eat in Season and Egg Shares outperformed last year
- Farmer's Choice and Custom Shares were lower than last year
- Purchased vegetables COGS higher than last year

Farm Q3 Update



Farm Team & Leadership Transition

- Strong Farm team in place heading into the fall season.
 - **Charlotte** has been focused on daily operations and volunteer engagement.
 - **Emma** coordinates CSA and Farm Stand logistics, customer communications, and day-to-day Farm coordination.
 - **Kylie** has led microgreens production and recently engaged more in seeding and transplanting.
- Volunteers provided important support throughout the summer, including harvesting, egg washing, packing, and food access activities.
- Tractor training currently underway for Kylie and Charlotte, cover cropping, and chicken move planned.

Leadership Transition: *Paul will be leaving the Conservancy due to a family emergency requiring a move to Maine. The Farm team will provide continuity while responsibilities and the longer-term leadership structure are determined.*

Fall Planning & Winter CSA



- Late-summer seedings & plantings being assessed. Okra and squashes will last through October.
- Fall plantings put in ground over last few weeks (radishes, beets, leafy greens)
- Team carrying out planning meetings to distribute tasks/functions and to plan the best strategy for the Winter offerings.
- Fall and winter production planning will help inform the broader 2027 crop plan and upcoming strategy meetings and survey/focus group results will impact focus areas (PYO, more variety, etc).

Food Access Donations

Anna Sudha – HARVEST FOR GOOD

- Okra crop has been really successful – challenge to recruit enough volunteers as it needs to be harvested every day
 - Hitting 50 lb a week and we are selling 30-40 lb
- Eggplant and tomatoes were not able to be donated, but other crops donated
- New volunteers and customers introduced to Farm, fundraising not easy in year 1 since picnic canceled



Food Access Donations

DSFP Weekly Donations

- Shares not picked up are donated
- Additional crops that would go back before next market
- DSFP sends total weight of donations at end of season (incomplete data shared YTD)

DSFP Produce Fund

- Total Raised: \$12,838
- Amount Donated: \$7,359
- 2026 Total: \$2,789
- **Balance: \$5,299**

Net proceeds from Wine Down for a Cause & grants will fund Farm donations to DSFP in 2027, including labor

Volunteer Program

189 volunteers | 2053+ hours contributed*

Area	Volunteers	Hours
Farm	75	1473
Land Stewardship	50	232
Events	48	349
Leadership	16	*

** This number does not include hours by the Board, which have historically not been shared*



Growing the program

- Farm and Land volunteers show strong repeat participation, with 69 volunteers volunteering more than once
- Sabrina has begun taking deeper look at our volunteer systems and processes, including researching dedicated volunteer management software
- Moving to **Better Impact** will centralize volunteer profiles, sign-ups, waivers, training, hours, interests, and reporting
- This will reduce reliance on SignUpGenius + spreadsheets and give us better visibility into volunteer engagement and impact

Key takeaway: Volunteer participation is growing, and we are building the infrastructure needed to manage and scale the program effectively.



Communications

Newsletter open rate increase*	Increase in social views	Social views from non-followers increase
19%	61%	73%

*May-Current

Email Newsletter performance is improving

- 19% average open rate since May, up from 14.6% Jan-May
- Implemented stronger subject-line framing and began consistently using preview text to give readers more context + sent earlier in the day
- Newsletters are currently our largest communication channel

Social Media

- 73% of views came from non-followers, expanding reach beyond our existing audience
- Top performing content: Bobcat Trail Camera photo, Fish restock, Pollination Celebration
- Engagement is fairly balanced across Farm, Land Stewardship, and Event content

Key takeaway: Small changes to email strategy are improving performance, while social content is reaching a broader audience beyond our followers.



Upcoming Programs & Events

9/19 - Community Bonfire & Camp Over

9/21 - Nature Journaling (LCPS Day off)

10/1 - Wine Down for a Cause

10/5 - Photographing Wildlife: How to Capture Nature in Motion

10/12 - Give Trash a Second Chance: Arts & Crafts (LCPS day off)

10/24 - Harvest Market

10/28 - Field Day (LCPS Day off) TBD

11/9 - TBD LCPS Day off program

11/19 - Holiday Farm Stand

TBD - Winter or Spring Astronomy Viewing with Northern Virginia
Astronomy Club and Bird Walk with Loudoun Wildlife Conservancy



Operations

- Sabrina has joined us full time in June as our Programs and Engagement Associate. She will primarily recruit and manage volunteers and give us more bandwidth to plan more programming and events.
- Land Stewardship Manager update
- Farm Team Transition
 - Three strong team members in place (Charlotte, Emma, Kylie)
 - Carrying out facilitated planning session to determine best strategy for fall and beyond

Finance Committee Update

- April-July 2026 Financials
- 990 Filing Update
- Budget Schedule & Principles

2026 YTD Financials

- Transfer Fees Remain strong thru July at \$56.5k which is \$32k above budget and \$31k ahead of 2025
- YTD Transfer fees are \$213.5k vs \$180.5k budget
- Organization wide payroll and benefits are \$121k under budget through July
- Land Stewardship payroll and benefits are \$85k under budget
- No significant unexpected expenses through July

2026 YTD Financials

- Farm revenue is below budget at \$93,170 YTD vs. \$138,685 budgeted YTD through July
- Egg sales have remained strong at \$25,483 YTD which is \$5k more than YTD 2025
- Farm expenses and payroll are below budget

2025 Audit & 990 Filing Update

- Audit successfully completed in April
- Audit Report approved by Finance Committee in July (*provided in Board Packet*)
- Schedule O completed in August and 990 will be shared with Board for review in late Sept.
 - *501c3 status impacted reporting in form slightly, but not review process*
- Target filing date is October with deadline of Nov. 15

2027 Budget Schedule

- August – staff started drafting annual work plans, forecast against 2026 budget, and draft 2027 budgets
- Mid Sept. – draft budgets presented to board for feedback
- Sept. 22 – feedback from CAC at their meeting
- Draft budget will be shared with community in conjunction with Joint Board Meeting on Oct. 14
- Late Oct – Revisions and town hall for resident feedback
- Nov. 5 – Board vote on budget at Board Meeting
- Nov. 11 – HOA Board consideration of budget at their Board Meeting

2027 Budget Guiding Principles

- **Focus on Our Core Mission** – Prioritize resources that directly support our mission and responsibilities.
- **Maintain Financial Sustainability** – Balance current needs with long-term financial stability.
- **Manage Costs Responsibly** – Control expenses while accounting for increases in health insurance, cost of living, fuel, utilities, insurance, and cost of goods.
- **Diversify Funding Sources** – Pursue grants, partnerships, sponsorships, and in-kind support.
- **Plan Carefully for Capital & Reserve Needs** – Consider Reserve Study priorities and evaluate need, timing, alternatives, and funding before committing to capital projects.

A monarch butterfly with orange and black wings is perched on a cluster of small, light purple flowers. The background is a soft-focus green, suggesting foliage. The text "Adjourn for Executive Session" is overlaid in white, centered on the image.

Adjourn for Executive Session