

THE SONORAN INSTITUTE



1994 ANNUAL REPORT



The Sonoran Institute

The mission of the Sonoran Institute is to promote community-based strategies that preserve the ecological integrity of protected lands, and at the same time meet the economic aspirations of adjoining landowners and communities. Underlying the Institute's mission is the conviction that community-driven and inclusive approaches to conservation produce the most effective results.

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*Cover photo: Late afternoon in the San Rafael Valley — The Sonoran Institute helped ranchers in the valley create a local land trust to keep ranching viable and protect the valley's magnificent open spaces from residential subdivision.
Photo by Bob Sharp.*

In the summer of 1990, a group of dedicated environmentalists and far-sighted business leaders established the Sonoran Institute to promote a conservation approach too often missing from the United States. This approach is based on the assumption that conservation depends on balancing the needs of natural ecosystems with those of the people who are part of them.

We call it *community-based conservation*.

Community-based conservation begins with the premise that, over the long run, conservation initiatives work best when designed, implemented, and supported by local people. Put simply, conservation is most effective when it's part of a broader program that addresses a community's economic and social priorities. Establishing this "seamless linkage between conservation and community development" is vital.

While community-based methods are central to resource protection strategies in developing countries, until recently they have been largely overlooked in the United States. Quickly and quietly, however, the Sonoran Institute has become a leading practitioner of

community-based conservation in western North America. Our on-site efforts have helped dozens of communities move toward a locally determined and sustainable future.

Most of our work involves specific strategies:

- bringing people together to solve problems
- providing information about conservation and economic development options
- enhancing and diversifying rural economies
- identifying and protecting critical lands
- helping set up local conservation and sustainable development organizations
- securing new, market-based funding sources

Our results over the past year are noteworthy. But we have not done it alone. All our projects involve — and indeed depend upon — the efforts of a diverse collection of individuals, organizations, agencies, and businesses working toward a common vision.

This annual report therefore describes not only our own successes, but those of our many partners. It also explores the principles

that form the backbone of community-based conservation, principles founded upon our extensive work and experience throughout western North America.

Make no mistake, community-based conservation takes time: every setting is unique and requires an individually tailored approach. But at the Sonoran Institute, we're confident that community-based initiatives offer the best hope for lasting and effective solutions to the challenges facing our landscapes and communities.

Frank Gregg, Chairman

Luther Propst, Executive Director



Conservation and sustainable development initiatives can't be imposed from above. They need the support of the local people who live and work on the land.

One of the Sonoran Institute's priorities is to help nurture this support by promoting dialogue that leads to a widely shared vision for a community's future.

Such a vision should strive to integrate all a community's priorities, from protecting neighborhood values and vital downtowns to promoting a vibrant economy and protecting natural ecosystems. In an era of special interest politics, initiatives that integrate these potentially competing values — rather than pit them against each other — are more likely to produce lasting results.

Engaging a broad cross-section of the community in discussing the community's future also is an important prerequisite to action. Involving as many people as possible — and as early and often as possible — is the best way to assure widespread support for a community's plans for the future.

Sonoran Institute Projects

In more than 15 communities adjacent to protected lands, the Sonoran Institute has organized local forums — we call them Successful Communities Workshops — where people can discuss local values and reach agreement on a desired future.

Successful Communities Workshops are effective because

they place the responsibility for action squarely in the hands of citizens. People are forced to roll up their sleeves, listen to each other, and make an earnest attempt to find solutions that — while may be not anyone's ideal outcome — meet the needs and aspirations of the community.

In 1994, we conducted workshops in Lander, Wyoming, gateway to the Wind River Range; Greenwater, Elbe, and Ashford, Washington, gateways to Mt. Rainier National Park; and Arizona's San Rafael Valley, a rural ranching community on the U.S.-Mexico border.

Workshops nearly always result in local action. In the San Rafael Valley, for example, ranchers have created a new land trust

to protect the valley from residential subdivision and to ensure that ranching remains viable.

Past Successful Communities Workshops also continue to bear fruit:

- In Jackson Hole, Wyoming, site of a workshop in 1990, citizens recently approved land-use plans that protect sensitive lands, promote affordable housing, and seek a balance between tourism and conservation.
- In Crested Butte and Gunnison, Colorado, a 1991 workshop led to cooperative efforts between ranchers and conservationists, an alliance that Interior Secretary Bruce Babbitt chose as the starting point for negotiations over revisions to public lands grazing policy.



Liz Rosan

Participants at a Successful Communities Workshop in Moab, Utah, discuss options for the future of Grand County. Successful

Communities Workshops are effective because they place responsibility for action squarely in the hands of local citizens.

Dialogue and visioning are only the beginning. Once a community reaches agreement on a vision for its future, tangible steps are needed to realize it.

The best way to assure success is to involve citizens at every stage of the process. Rather than relying upon government officials or consultants to follow up on priorities, it's important that citizens become and remain actively involved. New leaders should be encouraged to step forward.

Short-term successes also are essential. An ambitious agenda that requires several years of planning or cultivation can splash cold water on a budding initiative. Likewise, vague and loosely defined goals will quickly be relegated to the back burner. People will stay focused if long-term objectives are broken into a series of more manageable steps and tasks.

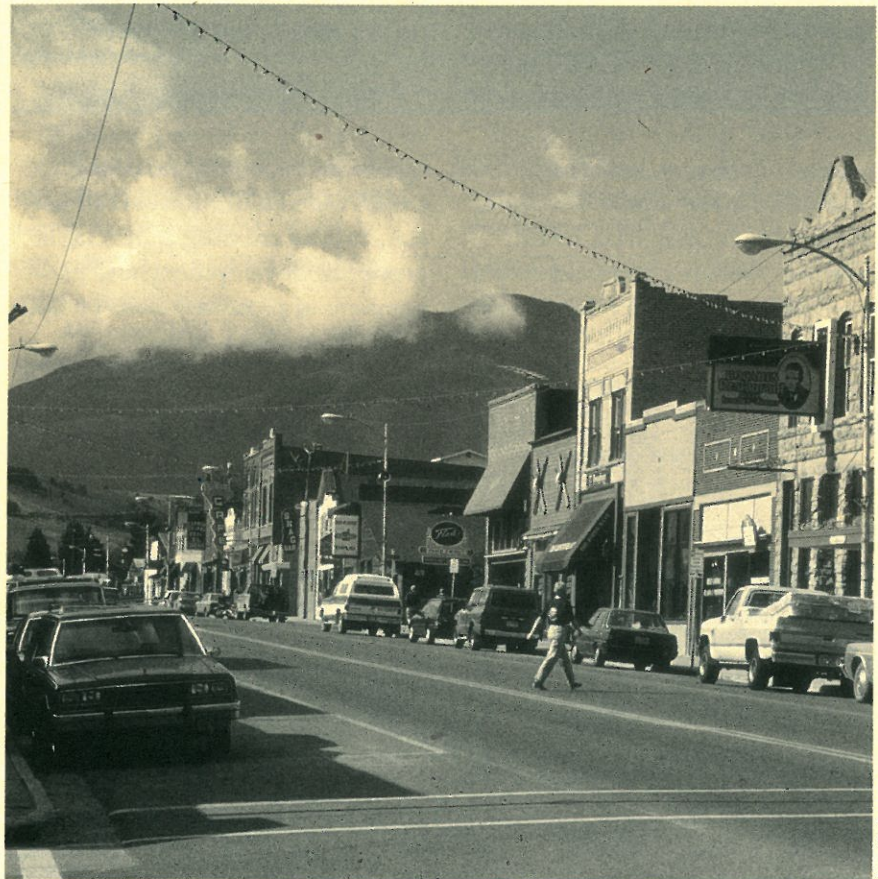
Perhaps the most important ingredient is the presence of an effective, inclusive, local organization with a broad, multi-faceted mission and an active agenda. New partnerships and organizations are often needed to address these challenges.

Sonoran Institute Projects

The Sonoran Institute has played an instrumental role in forming, funding, and fostering seven new community-based organizations, each customized to address local needs and circumstances. The Institute assists these organizations by helping to recruit board members and staff, refine missions and priorities, provide administrative support, and raise funds.

These groups fall into two distinct categories: community-based quality of life organizations and development-based conservation organizations.

Our role is not to set priorities, but to simply harness the knowledge, creativity, and determination of local residents. Our overriding objective is to help these organizations evolve into independent non-profit citizen groups with their own missions and staff.



Merv Coleman

Downtown Red Lodge, Montana — Red Lodge residents formed a new community-based organization — the Beartooth Front Community Forum — to help implement

the goals that emerged from a Successful Communities Workshop in June 1992. See story on page 5.

The citizen-run organizations described below work to enhance all the factors that contribute to local quality of life, from improving health care and economic opportunities to protecting open space and strengthening neighborhoods. Indeed, the secret to their effectiveness may be their ability to transcend the conventional bounds of single-issue advocacy.

International Sonoran Desert Alliance

Spanning an area from southeastern Arizona to the Colorado River delta, the U.S.-Mexico border region of the Sonoran desert is considered the largest, intact, arid ecosystem in the world. But while the region is rich in natural and cultural resources, economically it has suffered from boom-and-bust

cycles. New economic alternatives are badly needed.

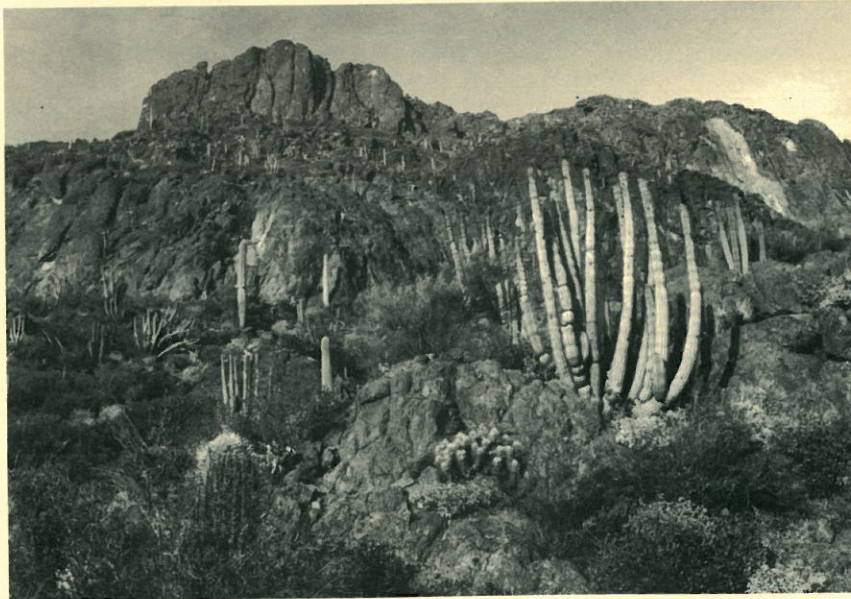
To find answers, the Sonoran Institute helped create the International Sonoran Desert Alliance — a coalition of local citizens, business owners, and government officials. ISDA works to improve quality of life for local people, while safeguarding the region's resources. Decisions are made by a 15-person board of directors that includes citizens of the U.S., Mexico, and the Tohono O'odham and Cucupá nations, whose homelands comprise a substantial portion of the area.

Since 1992, ISDA has addressed a panoply of issues identified by border residents, including health care, environmental education, border crossing, sustainable economic development, and management of protected areas on both

sides of the border. The organization's monthly meetings offer people an opportunity to share their experiences and knowledge, grapple with local concerns, and resolve critical issues facing the region's future.

The Sonoran Institute continues to assist ISDA as it evolves into a fully independent organization. In January 1994, we helped organize a conference in Puerto Peñasco, Sonora, where more than 300 participants identified their priorities for conservation and economic development, as well as steps for realizing them. ISDA utilized the results of the conference to prioritize its goals and objectives.

With funding secured by the Sonoran Institute, ISDA recently hired an executive director to oversee its many activities.



The U.S.-Mexico border region of the Sonoran desert is considered the largest intact arid ecosystem in the world. With assistance from the Sonoran Institute, the region's citizens created the International

Sonoran Desert Alliance, a nonprofit group working to protect natural and cultural resources and at the same time find sustainable economic activities for local people.

Corporation for the Northern Rockies

Over the last few years, the Sonoran Institute has convened Successful Communities workshops in nine communities in the Rocky Mountain states of Idaho, Montana, and Wyoming. At each workshop, local people expressed a need for a regional organization to help them identify appropriate economic development options for protecting the area's magnificent natural resources and landscapes from unplanned development.

To this end, the Sonoran Institute helped create the Corporation for the Northern Rockies, an independent nonprofit organization

that helps communities strengthen and diversify their economies, while preserving the natural environment and quality of life that make them unique. A diverse board of directors — conservationists, government officials, business owners, and ranchers — governs the organization.

To fulfill its mission, the Corporation helps communities carry out local priorities for sustainable development and sound land use. Several projects already are underway. In Sweetwater County, Montana, the Corporation is helping wool growers develop a certification program for “predator-friendly” wool; these certified growers protect their sheep with guard dogs and other non-lethal methods. And in Teton County, Idaho, the Corporation is helping residents attract investors for a gourmet cheese and salad dressing factory that will process and market the output of the county’s dairy farmers and keep agriculture part of the local economy.

The Sonoran Institute will continue to provide the assistance necessary for the Corporation to mature into a successful community support organization.

San Rafael Valley Land Trust

Arizona’s San Rafael Valley is a rolling shortgrass prairie that supports nearly a dozen working cattle ranches. The valley’s pristine condition is due largely to the attitudes and stewardship of its landowners, whose ranching lifestyle



Merv Coleman

has resulted in an open, undeveloped landscape.

Like much of the West, the San Rafael Valley is beginning to experience second-home development, escalating real estate prices, and recreational pressures. Already, one ranch in the valley has been lost to subdivision.

In June 1994, valley residents sponsored a Successful Communities workshop to help them plan for the future of the valley’s private lands. As a result of the workshop, valley residents are now in the process of creating the San Rafael Valley Land Trust, a new landowner-based organization that will help to protect the valley’s land base and ensure that future development is compatible with both ranching and the landscape.

The Sonoran Institute has helped valley residents draw up a mission statement and goals for the new organization, as well as bylaws and articles of incorporation. Valley residents also have asked Sonoran Institute staff to serve on the land trust’s board of directors.

The first task of the Beartooth Front Community Forum, in Red Lodge, Montana, was to establish a new youth center for local teenagers. The Forum is now addressing several community betterment projects, including a land-use plan for Red Lodge.

Beartooth Front Community Forum

Another organization we helped form is the Beartooth Front Community Forum in Red Lodge, Montana, gateway to Yellowstone National Park and the Absaroka-Beartooth Wilderness Area in the Custer National Forest. At a Successful Communities workshop in Red Lodge in 1992, citizens identified a number of land-use and economic concerns in their rapidly growing town.

To carry out these projects, residents established the Beartooth Front Community Forum — a citizens group of ranchers, writers, downtown merchants, and other residents.

The Forum addresses any local issues that residents feel are important. It raised money for a new youth center for Red Lodge teenagers, set up a water quality monitoring program, and even successfully lobbied the U.S. Postal Service to retain a new post office downtown rather than relocate to the outskirts of the community.

The Forum is now working on a land-use plan for Red Lodge that seeks to stimulate downtown business and provide incentives for landowners to prevent sprawling low-density subdivision. The Sonoran Institute has helped by raising funds and providing technical support.



Increasing numbers of people are choosing to live in the small towns and open spaces surrounding parks, wildlife refuges, and other protected areas. Although development of private land adjacent to these areas often encroaches upon native ecosystems, it also represents an opportunity to ensure that development pays for conservation activities.

The Sonoran Institute is capitalizing on this opportunity by seeing that conservation is integrated into and financed by the development process. So far we've helped create three new nonprofit organizations, each working to see that conservation is a priority at new development projects adjacent to three different protected areas. Each of these organizations is financed partly by permanent deed restrictions or other arrangements that guarantee lifelong funding for conservation activities.

Each organization remains affiliated with the Sonoran Institute, which provides administrative support and technical assistance. Ultimately, we aim to create a global network of development-based conservation organizations.

Saguaro National Park, Arizona — The Rincon Institute, our affiliate, is instilling a conservation ethic into a 4,500-acre residential development adjoining the park. Funds for the Rincon Institute's conservation activities — which include habitat restoration, environmental education, and ecological research — are derived from fees assessed upon the development process.

The Rincon Institute

The Sonoran Institute established the Rincon Institute in 1991 to help protect the sensitive desert ecosystems of Saguaro National Park from Tucson's continued urban expansion. The Rincon Institute's activities eventually will be funded through nightly hotel room surcharges, commercial occupancy fees, and deed restrictions that assess fees to builders and homeowners at the Rocking K Ranch, a major development adjacent to the park.

1994 was another busy and productive year: The Rincon Institute helped convince Congress to add 3,500 acres to Saguaro National Park, as well as upgrade the park from its previous status as a national monument.

Institute ecologists also continued to monitor the diverse wildlife and vegetation on the Rocking K and in Saguaro National Park.

Their findings will help reduce the impacts of development not just in Tucson, but throughout the West. A guidebook entitled *Repairing Degraded Riparian Ecosystems* will be published in 1995.

Environmental education is another Rincon Institute priority. With support from Saguaro National Park, the Institute has helped a local school district utilize the park as an outdoor classroom.

The Rincon Institute also is leading efforts to find common ground between the environmental and development communities. At a conference in autumn 1994, the Institute brought together Tucson area builders, developers, public agencies, and environmental advocates to discuss collaborative ways of resolving conflicts over land use. As a result, two proposals — a county land acquisition program and a plant salvage program — are already underway.



National Park Service

Las Virgenes Institute

At the invitation of both local officials and landowners, the Sonoran Institute is helping establish the Las Virgenes Institute to restore habitat and manage open space at the Ahmanson Ranch, a resort and residential development bordering the Santa Monica Mountains National Recreation Area in Ventura County, California.

Modeled after the Rincon Institute, the Las Virgenes Institute will help protect the rolling foothills of oak savannah that characterize this part of California's coastline; more than 85 percent of the 13,000-acre project site will be preserved as natural open space. The new community also will include affordable housing and a trail system that will allow residents to commute to work by bicycle or on foot.

Initial funding for the Las Virgenes Institute is derived from the Ahmanson Land Company. In the future, funds will come from a trust fund financed by construction activities and an annual golf tournament. The Sonoran Institute recently hired a southern California field representative to oversee startup of the Las Virgenes Institute.



Ahmanson Land Company

Santa Monica Mountains National Recreation Area, California — The Las Virgenes Institute aims to restore wildlife habitat and manage open space on a 13,000-acre project, the Ahmanson Ranch, that adjoins the park. More than 85 percent of the project will be set aside as natural open space available for public use.

Methow Valley Environmental Center

For two decades, residents of Washington's Methow Valley battled a downhill ski resort proposed adjacent to the Okanogan National Forest. When the R.D. Merrill Company acquired the property in 1993, environmental leaders and the company asked the Sonoran Institute to help find a locally acceptable use for the land.

The community found an answer in a small-scale cross-country

ski center that will allow R.D. Merrill to realize an economic return from the property without transforming the quiet valley into a bustling downhill ski resort.

What's more, the company has agreed to assess a 1.5 percent fee on all real estate transactions in the development; the revenue will fund acquisition of conservation easements on private lands in the valley as well as a new nonprofit organization — the Methow Valley Environmental Center — that will restore wildlife habitat and offer environmental education programs designed to instill a conservation ethic in visitors and residents.



In northern Mexico, the Sonoran Institute is supporting a collaborative, community-based effort to help protect the biological diversity of the Sierra Madre Occidental and preserve the culture of the Tarahumara Indians who live there.

To expand the Tarahumara's economic options, the Sonoran Institute — in partnership with Native Seeds/Search, a Tucson-based botanical group, and Chihuahua al Pacifico Tours, a Mexican tour operator — is evaluating the region's potential for ecologically and culturally sensitive tourism. We're also looking at ways to expand the market for locally produced crops and arts and crafts.

The Institute also has worked with Tarahumara leaders to de-

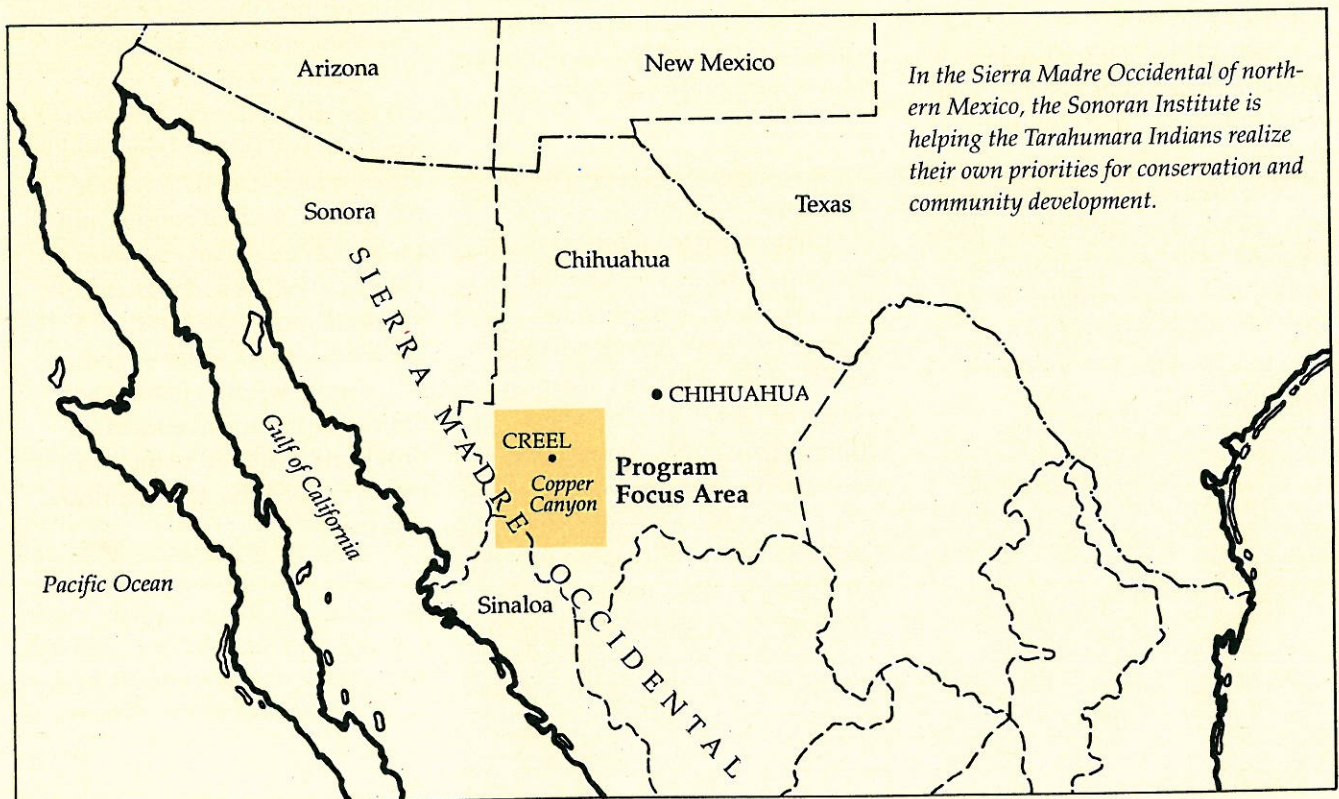
velop and establish 28 irrigated gardens and orchards in several communities on the north rim of the world-renowned Copper Canyon. The gardens assure a diverse and stable food supply and help combat the drought that has plagued northern Mexico for the last two years.

The Institute also is helping the Tarahumara reforest logged areas. A small nursery has been set up to provide saplings for planting. And in cooperation with the Universidad Nacional de Mexico, University of Arizona, and University of Amsterdam, the Institute is inventorying the Sierra Madre's forest lands so that remaining old-growth stands can be protected.



The Sonoran Institute provides administrative support to Environmental Flying Services — an aviation service that flies researchers to, from, and over biodiversity conservation projects in Mexico and the southwestern U.S. EFS is a crucial partner in the Institute's Sierra Madre program.

Environmental Flying Services thanks the following generous donors: Ahimsa Foundation, Amazon Foundation, Crystal Channel Foundation, Virginia S. Furrow, The Greenville Foundation, National Fish and Wildlife Foundation, The Nature Conservancy, North American Pronghorn Foundation, Share-It-Now, L.J. Skaggs and Mary C. Skaggs Foundation, Summerlee Foundation, Margaret Cullinan Wray Charitable Fund.



Conservation and sustainable development projects require more than just commitment — they need funding. With government appropriations for conservation on the decline, new and innovative funding sources are sorely needed.

Sonoran Institute Projects

The Sonoran Institute specializes in finding new funding sources to help communities protect resources and quality of life.

First, as mentioned above, our development-based conservation organizations ensure that conservation is integrated into and financed by the development process. So far we've created three new organizations — each financed by permanent deed restrictions or other arrangements that guarantee lifelong funding for conservation projects — at communities adjacent to three different protected areas.

Second, over the last several years the Sonoran Institute's Innovation Grants program — administered in cooperation with World Wildlife Fund — has distributed \$700,000 in seed money to more than 100 organizations across the country. Funded by S.C. Johnson & Son, the makers of Johnson Wax,



C.E.D.O.

the program points the way toward strategies that create livable and more distinctive communities. The 1994 Innovation Grants program awarded more than \$200,000 of small grants between \$6,000 and \$8,000.



With financial assistance from the Sonoran Institute's Innovation Grants program, the International Sonoran Desert Alliance is investigating sustainable economic options for border residents. New options are needed. Above, a trawler lies idle in Puerto Peñasco, Sonora, after the local shrimp industry crashed.

Why do some community-based conservation efforts prosper while others fail? What are the ingredients of successful initiatives?

Sonoran Institute Projects

Through a variety of media, the Institute communicates the principles of community-based conservation to organizations, communities, governments, and

citizens. Wherever possible, we use specific examples from other communities: living proof that communities looking for answers don't have to start from scratch.

In 1994, we took our message to communities as diverse as Hurricane, Utah; Enumclaw, Washington; and the Eastern Shore of Maryland.

We testified before a panel of the U.S. House of Representatives, participated in a Keystone Center

roundtable on ecosystem management, served on the President's Council on Sustainable Development, and helped determine the future priorities of the United States Man and the Biosphere Program.

By sharing our results with others, the Sonoran Institute helps advance the cause of local conservation and sustainable community development throughout North America.

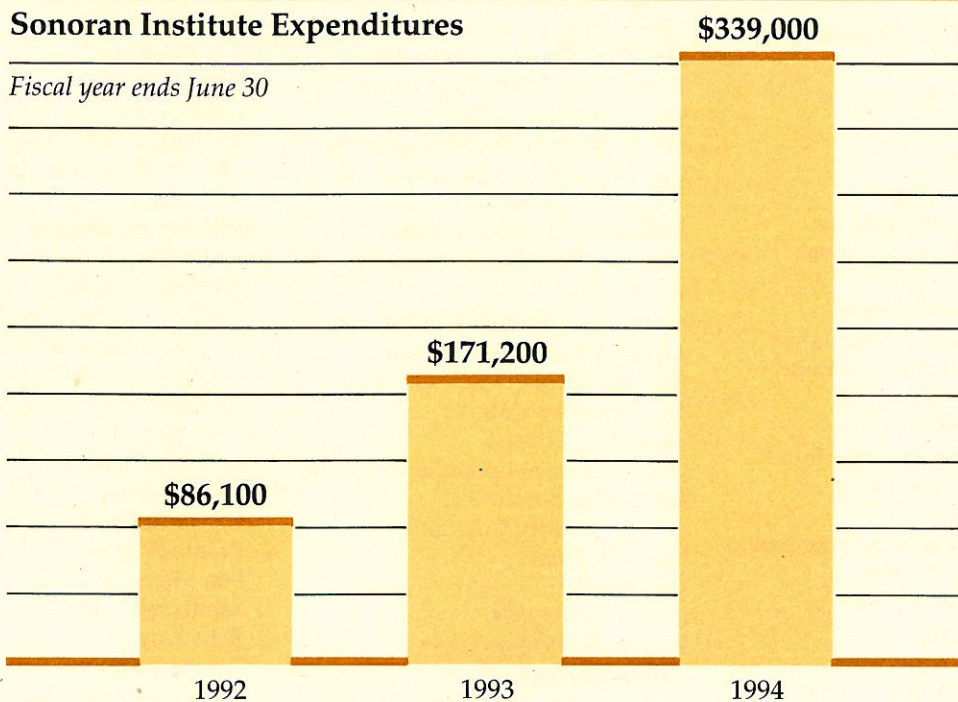


Throughout North America, rural communities are starving for information on land-use and sustainable development options. An upcoming book by the Institute will help them find ways to protect their natural resources and distinctive character without jeopardizing local economic vitality.



Christopher J. Duerksen

In fiscal year 1994, the Sonoran Institute's budget was \$339,000. Our revenues were derived from a diverse blend of more than two dozen foundations; fifteen federal, state and local agencies; a dozen corporations; and nearly one-hundred individuals and organizations. The Sonoran Institute's projected budget for fiscal year 1995 is \$365,000.



The Sonoran Institute is a nonprofit, tax-exempt corporation recognized under Section 501(c)(3) of the Internal Revenue Code and is a publicly supported organization as defined by Section 170(b)(1) and 509(a). Donations to the Institute are tax deductible.

These figures were compiled by the accounting firm Peachin & Peto for submission to the Internal Revenue Service.

The board and staff of the Sonoran Institute extend heartfelt thanks and appreciation to all of our generous donors, supporters, and partners. The following foundations, individuals, and organizations enable us to implement community-based conservation strategies throughout western North America.

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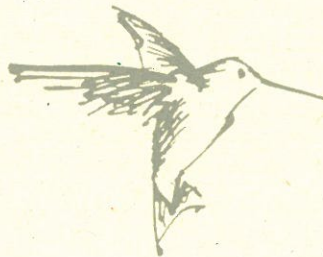
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