



# Strategic Planning for Land Trusts

April 29, 2023

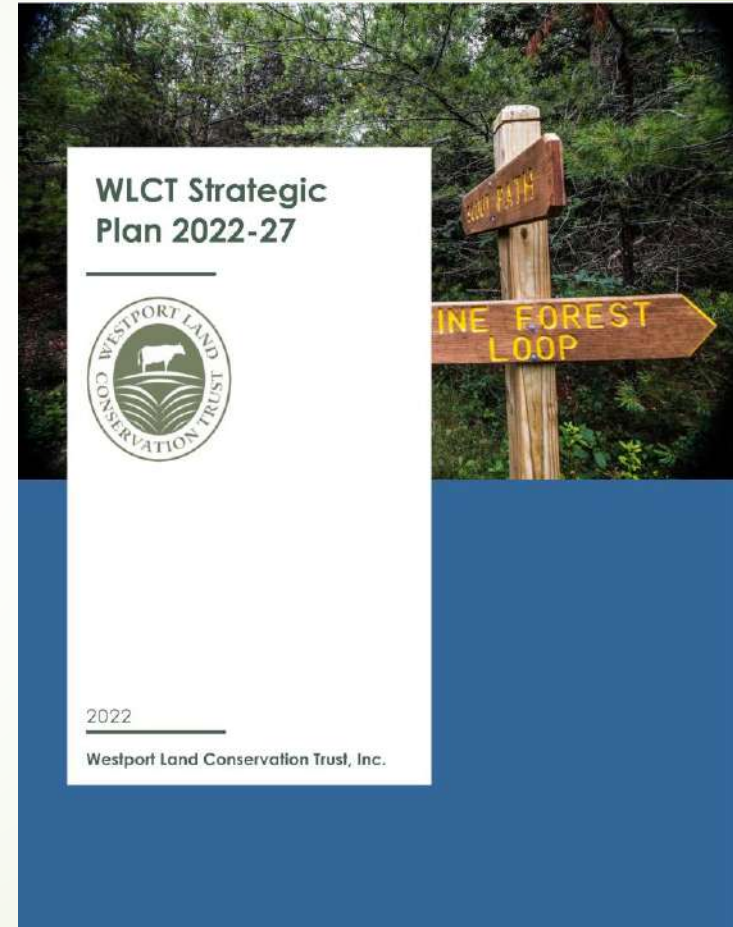


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# Why do we need a strategic plan?

“We don’t need yet another plan that will just end up on a shelf!”

- Unified path forward
- Focus
- Goals for growth or foundation
- Illustration for your community
- Accountability





# What type of strategic planning do we need?

External Assistance (consultant) vs. Internal Development

**Reflect on historical context and present day:**

- Where are we in our organization's history?
- Do we have opportunities for growth?
- Do we have a need to clearly define our efforts internally and externally?
- Is our leadership focused on a path? Or are their diverging viewpoints?
- What type of capacity do we have to think strategically?
- Does our recent growth need a "foundation"?

# Important organizational characteristics for strategic planning

- Identify leadership and team
- Identify TIME
- Commit to extensive data gathering and reflection
- Focus on tangible outcomes- a path forward must be created!
- Commit to accountability

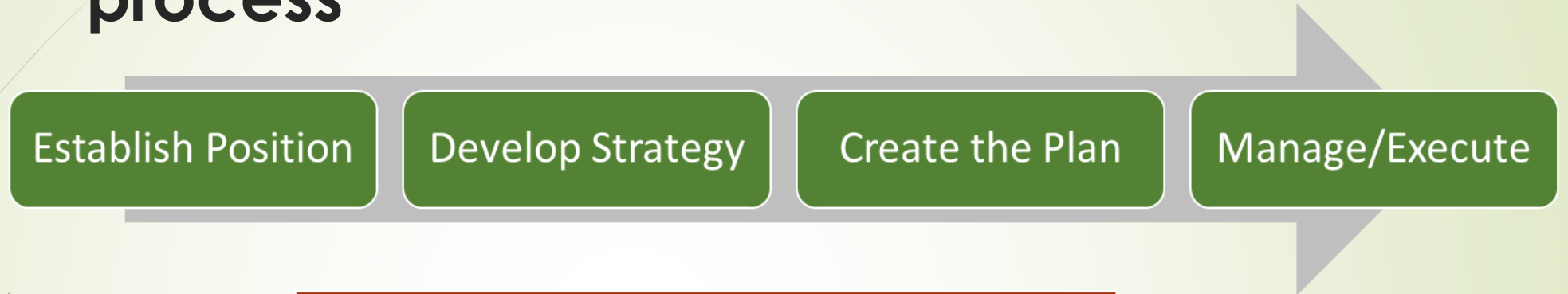


# Example of internal strategic plan process



<b>Establish Position</b>
<b>Recruit Leadership</b>
<b>Form Strat Plan Committee</b>
<b>Staff, Volunteers Compile Data</b>
<b>Committee Assess Internal Data</b>
<b>Committee Recommends Key Ideas</b>

# Example of internal strategic plan process



## Develop Strategy

Board Retreat

Committee Conference Reflection

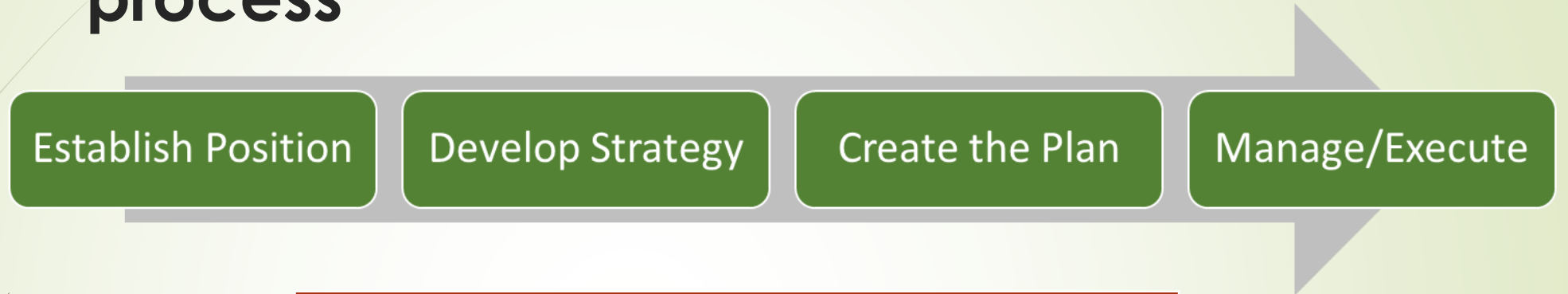
Focus Groups (internal and external)

SWOT on Data

Research Best Practices

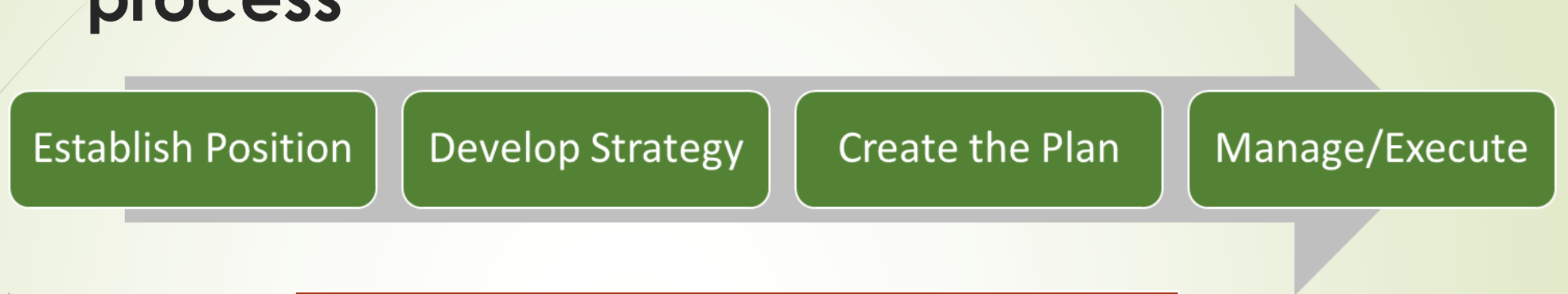
Develop "Pillars" of your plan

# Example of internal strategic plan process



<b>Create the Plan</b>
<b>Draft Strategic Plan</b>
<b>Review with BOD/Committees</b>
<b>Review with internal/external constituents</b>
<b>Consult experts in the field</b>
<b>Finalize plan</b>

# Example of internal strategic plan process



- Manage/ Execute**
- Create Plan Accessibility**
- Create Plan Accountability**
- Establish Work Planning**
- Outreach to Relevant Parties**






**Strategic Planning:  
Lessons Learned and Positioning for Successful  
Outcomes**





# Lessons Learned – Process

- ▶ ***Position your organization for exploring possibilities for what is needed to best meet your mission***
  - ▶ The planning process provides an opportunity for discussing new or problematic topics and ways of addressing those topics
  - ▶ Encourage an open and creative atmosphere for brainstorming and “out of the box” thinking
  - ▶ Envision where you want to see the organization in the future and work backwards from there
    - ▶ Land Stewardship capacity example
    - ▶ Permanent Headquarters example



# Lessons learned – Implementation

## ➤ *Engage your Board & Staff*

- Strategic goals & actions help to engage Board & staff in working towards common goals
- Specific action items & schedules are more helpful than general plans with no specifics
- Use the strategic plan as a checklist “work plan” & as a tool to measure progress towards goals

## ➤ *Engage your volunteers*

- Encourage Committee’s to review the plan on an annual basis (i.e. Outreach, Land Protection, Land Management, Development)
- “The Strategic Plan Keeps Us Focused and Generates Creative Ideas for Implementation”



# Lessons learned – External Communications

- ▶ ***Prepare to share your Strategic Goals with a broader audience***
  - ▶ A Board approved & up-to-date Strategic Plan builds & maintains the credibility of the organization (especially important for donors, grantors, members, & the community)
  - ▶ Create an “external” succinct summary of the plan for sharing with a broad audience.
  - ▶ Examples...

# Essex County Greenbelt example



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JERRY MONKMAN/ECOPHOTOGRAPHY.COM

DAVID ALDEN-ST.PIERRE

## MISSION

Greenbelt protects natural land and working farms across Essex County forever, helping to conserve healthy ecosystems, clean water, local food supplies, scenic landscapes and free, accessible places for all to benefit from nature.

## VISION

Abundant protected natural land and working farms of Essex County sustain healthy ecosystems, enrich the quality of life for all, and inspire current and future generations.

## VALUES

Our core values are the principles which guide and inspire us daily. They drive our accountability to each other and to the individuals, families, organizations and 34 communities with whom we work.

### Greenbelt values:

- **Conservation**, in perpetuity, of the distinctive landscapes and the irreplaceable natural resources of Essex County
- **Integrity and excellence**, deserving of public trust, expressed in our commitment to the highest standards of honesty, transparency, and professionalism
- **Respect** for the varied local conservation interests and visions of the diverse communities that we serve
- **Equitable access** to nature to benefit human health and wellbeing
- **Inclusion** of people from all backgrounds, acknowledging historic and present inequities
- **Conservation leadership** through partnership and innovation, dedicated to gaining and sharing knowledge and experience
- A **collaborative culture** of optimism and creativity that is confident, kind, and resourceful

# Sudbury Valley Trustees example



## Sudbury Valley Trustees Strategic Plan July 1, 2018 - June 30, 2023

Approved by Board of Directors, June 13, 2018

## Vision 2050

- ▶ In 2018, the SVT Board of Directors approved a Strategic Plan that will guide our work for the next five years while laying the groundwork for the year 2050.
- ▶ **The key theme?** Acceleration! Since SVT's founding in 1953, we have participated in the protection of 8,000 acres in the region. By 2050, **we want to accelerate the pace of our work so we can protect 12,000 more.**
- ▶ While some of the plan includes tried-and-true strategies (restore wildlife habitat; lead interesting outings), we're making a few key shifts in how we will do our work:
- ▶ While "collaboration" has been a constant theme in SVT's work, this plan charges SVT to put greater emphasis on helping our allies build their capacity to conserve and steward land. We'll have more impact if we work with others, and besides, it'll be a lot more fun!
- ▶ Our 2,900 members have done a tremendous job of supporting SVT, and we are grateful for their generosity. For our new plan to succeed, we must motivate a broader cross-section of the region's 700,000 residents to become champions and members.



# Best practices and shared ideas

- Let's hear from you all!
- What has worked well for you?
  - Planning process
  - Implementation
  - Community engagement and communications



**Thank you!**

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