

**SOURLAND CONSERVANCY
STRATEGIC PLAN**

2016-2018

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Strategic Planning Committee

Board: Jim Amon, Marylou Ferrara, Joanna Fiori

Staff: Laurie Cleveland, Caroline Katmann

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TABLE OF CONTENTS

Vision, Mission, Values	2
Strategic Planning Process	3
Competitive Position	4
Goals, Objectives, and Strategies	5
Concluding Thoughts	8

Appendices:

A: Interview Themes

B. Interview Schedule

C: Interview Questions

D. Strategic Planning Structure

E: Revenue Projections

F. Proposed Organization Chart

G: Comparison of Structures (this is a separate attachment for now)

H. Sample Rubric for Sourland Stewards

VISION, MISSION AND VALUES

VISION

The Sourlands as a refuge of cultural and natural diversity.

MISSION

To protect, promote and preserve the unique character of the Sourland Mountain region.

Protect - We work to protect the Sourland Mountain region's ecology through stewardship of natural resources and advocacy through effective citizen action.

Promote - We promote the use of environmental best management practices and build awareness of cultural heritage through education and effective communications.

Preserve – We advocate for the preservation of the historic and ecological qualities of the Sourland Mountain region.

Unique character - We embrace the many unique qualities that embody the diverse character of the Sourland Mountain region including ecological, historical, and cultural.

Sourland Mountain Region - We focus our work on the 90-square mile region that comprises the largest contiguous forest in central New Jersey and includes a 17- mile long ridge extending from the Delaware River at Lambertville to the western end of Hillsborough Township near the community of Neshanic, through Montgomery Township and into Hopewell Township in Mercer County.

VALUES

Inclusive: We believe that citizens should play a vital role in the decisions of their communities.

Knowledge: We aspire to increase the understanding of the unique character of this region.

Respect: We understand that there is a wide divergence of regional interests and stakeholder needs and that effective change is born from a positive discourse of ideas.

Diversity: We value the collective, rich heritage of our Sourland community.

STRATEGIC PLANNING PROCESS

In September 2015, the Board Chair appointed a Strategic Planning Committee to work on a planning process with consultant Jamie Kyte Sapoch. In addition to Board Chair Joanna Fiori, the Committee included trustees Jim Amon and Marylou Ferrara and staff Caroline Katmann and Laurie Cleveland. The key aspects of this work over the planning period include:

- **Five (5) meetings with the Strategic Planning Committee** over the period from October 2015 – February 2016.
- **Sixteen (16) personal meetings or phone interviews** with members of the board of trustees.
- **Six (6) personal meetings or phone interviews** with representative members of the Sourland Conservancy.
- **Three (3) informal discussions** with representative members of peer environmental organizations.
- **Three (3) informal discussions** with representative members of the funding community.
- **One (1) full board retreat.**

The main emphasis of the committee was to receive, review and discuss the information being presented by the consultant. In particular, the committee reviewed the consultant's findings from 22 interviews conducted with each member of the board and six members of the broader Sourland Conservancy community. Key findings from those interviews are attached in Appendix A but summary themes included:

1. **Education** is what we do very well and is viewed as the most effective way the Sourland Conservancy delivers its mission.
2. **Citizen Action** is a strength of our work and our ability to mobilize/motivate/rally the troops is a powerful asset.
3. **Distinct Place** of the Sourland region is our niche and is embodied by our commitment to being a place-based, grassroots organization.
4. **Board** must be more fully engaged and has work to do.

These four themes are the foundation of the Strategic Plan. They serve to narrow our focus, inspire our work, and if embraced, will hold our board and staff accountable to sustaining an organization of relevance and financial stability into the future.

COMPETITIVE POSITION

The Sourland Conservancy operates in an extremely active region where environmental awareness is valued. It shares space with a number of other established environmental organizations with seasoned boards and clear operational and strategic goals. These organizations include: D&R Greenway, N.J. Conservation Foundation, Stony Brook-Millstone Watershed Association. In addition, the region includes a number of smaller land trusts with strong local ties including: Friends of Hopewell Open Space, Hunterdon Land Trust, and Friends

of Princeton Open Space. This helps illustrate the competition the Sourland Conservancy faces to obtain *and* retain members, institutional funds, volunteers and committed, effective trustees.

This competition also underscores the need for the Sourland Conservancy to identify a distinct path forward. While that path does not need to deter from the grassroots heritage of the organization, it will require a (1) more concentrated focus on the type of work we undertake and (2) MUCH more measurement and accountability to better evaluate the impact of our work.

GOALS, OBJECTIVES, AND STRATEGIES

With this in mind, the following Goals, Objectives, and Strategies have been developed to help both inspire *and* refine the operation of the Sourland Conservancy over the next three years.

The Four Goals are to:

1. Govern effectively.
2. Achieve meaningful regional impact.
3. Be financially sustainable.
4. Attain accountability in our work.

Combined, they are meant to guide the board's fiduciary and strategic decision-making and the staff's day-to-day operational decisions.

GOAL #1

GOVERN EFFECTIVELY.

Key Objectives and Strategies

1. Build an effective governance structure that reflects our grassroots heritage.
 - Constitute a smaller board (12-14) of trustees who can guide the strategic and fiduciary direction of the organization.
 - Assess the current board composite of qualities and characteristics to identify specific needs for future trustees and leadership.
 - Establish a 12-month Governance cycle to help support board transition
 - Set a meeting calendar that schedules full board meetings and Executive Committee meetings in alternating months.
 - Define and adhere to best governance practices that reflect commitment to both fiduciary and strategic governance responsibilities.
2. Reconstitute board and ad hoc committees.
 - Adopt standing board committees with defined mission statements to include: Executive Committee, Governance, Stewardship, Education and Heritage, Citizen Action, Finance, and Garrett Society.
 - Identify and recruit non-trustees onto all committees as proving grounds for potential board members and to maintain post-trustee relationships.
 - Use ad hoc committees for each special event or initiative (eg. Strategic Planning).

GOAL #2

ACHIEVE MEANINGFUL REGIONAL IMPACT.

Key Objectives and Strategies

1. Develop Sourland Stewards to be an ongoing *anchor* program.
 - Recruit additional volunteer credentialed experts to create an Advisory Committee.
 - Train volunteer teams annually to help with assessment and create resident-specific stewardship plans.
 - Build a formal accreditation – and recognition – program.
 - Identify ways to use the Stewards as an umbrella for ongoing natural resource protection initiatives like deer management and reforestation.
 - Partner with and help coordinate the efforts of other organizations working to protect the Sourlands.
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2. Utilize the rich cultural heritage of the Sourland region to distinguish our work.
 - Create a 24-month plan to promote the Sourland Mountain African-American Museum that could include:
 - Collect, organize, and disseminate local oral history.
 - Host a photography or art exhibit from Sourland artists.
 - Sponsor a lecture series or panel discussion to feature knowledgeable, respected local and regional experts.
 - Organize volunteer work days to complete site restoration.
 - Co-host a traditional camp meeting with the Sourland Mountain African-American Museum.
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3. Foster educational awareness of the unique characteristics of the Sourland region.
 - Continue outreach communications through the newsletter, website, FaceBook, and email blasts.
 - Maintain a vibrant, annual schedule of programming including the Train Station Series, annual bus tour, and regular nature hikes.
4. Promote advocacy through Citizen Action.
 - Create a regional **network of volunteers** to help systematically monitor town committee, planning board, and zoning board agendas in all Sourland communities.
 - Develop a *Sourland Citizen Activist Training Manual*.
 - Host annual workshops to discuss core issues affecting the region and to conduct training on *How to be an effective Citizen Activist*.
 - Update the Sourland Action Alert network to quickly mobilize volunteers to attend important town meetings.

Goal #3

BE FINANCIALLY SUSTAINABLE.

Key Objectives and Strategies

1. Increase funding from major gifts.
 - Reconstitute the Development Committee as the Garrett Society Committee whose focus will be to cultivate, steward and solicit contributors of \$1000 or more.
 - Train committee members on effective solicitation and cultivation methods.
 - Host intimate cultivation events at Sourland-friendly historic farms to introduce strategic priorities (eg. the Sourland Stewards) and to ask for support.
 - Shift to staff management of annual fundraising programs (annual appeal, new members, grant-writing) and use board strategically for stewardship, major gift solicitation, and follow-up.

2. Develop fundable components of priority programs.
 - Review all annual program work with a critical eye for components that can be packaged together for potential funders (make sure to include staff time.) These could include:
 - Citizen Activist Training Manual and Training Sessions
 - Sourland Steward Accreditation Program
 - Oral History Collection Project
 - Sourland Mountain African-American Museum Speakers Series

3. Evaluate the cost-benefit of all special events.
 - Conduct a cost/revenue analysis of all fundraising events, including staff time.
 - Assess the importance of each event's investment to mission, asking the question how could these funds (including the significant investment of staff time) be reallocated to advance mission?
 - Reconsider any event without significant volunteer leadership, as that will mean a reallocation of staff time away from priorities.

Goal #4

ATTAIN ACCOUNTABILITY IN OUR WORK.

Key Objectives and Strategies

1. Have staff work with board committees to strategically develop the following annual tools to help establish priorities and clarify resource allocation:
 - Program Plan
 - Development Plan
 - Annual Budget
 - Communications Plan (over time)

2. Commit to disciplined measurement and evaluation of all work.
 - Develop a series of organizational *rubrics* to establish parameters for success, to measure the impact of all priority work, and to help evaluate board performance.

CONCLUSION

The right governance model is the *essential first step* to a successful Strategic Plan. Our current model is one reflective of a younger organization, rooted largely in its fiduciary responsibilities. Board members are not uniformly engaged and the majority of the work is carried out by a few.

While this is not an unusual position, it is unusual for an organization entering its fourth decade. In this position, trustees can lack true understanding about the goals of the organization, how they fit in and end up delegating the “real work” to other more vocal trustees. This results in trustees who feel discouraged, disengaged, and underused. Change is linked to what is called “the new work¹” of boards – work that matters. That work is:

- Focused on consensus-identified issues central to the organization’s success;
- Driven by results that are linked to clear deadlines;
- Committed to measuring success by agreed-upon assessment standards; and is
- Inclusive, encouraging broad participation and in turn generating widespread support.

This model is not confined by the size of the organization. But being effective requires a *blend of fiduciary and strategic*² thinking. This includes many of the things we discussed two years ago: Clear board responsibilities, consensus-based/participatory decision-making, and measured mission-driven priorities. It also requires the addition of key constituents and partners into the conversation. This model is the foundation from which all that the Sourland Conservancy aspires to achieve will be launched, evaluated and ultimately made effective.

Also essential is for the board to make a commitment to *assessment*. This means evaluating our work to better understand *impact*. Rubrics are very effective and can help measure the success of most of our work. We derive them, with standards established by us. Used effectively, they will position the Sourland Conservancy for a future that is: governed efficiently, has strategic mission-driven programs, and tells a compelling results-driven story to the community about the relevance and importance of our work. A sample rubric for the Sourland Stewards is included in Appendix H.

The Sourland Conservancy remains at a crossroads. This Strategic Plan has the potential to guide us to a sustainable future. But we cannot expect to sustain the organization on its current path. We must turn board attention to strengthening the board, tightening strategic work, measuring outcomes, and evaluating impact. Funders look for this and increasingly so do other important stakeholders. Attending to this work is the sign of a mature organization, which, at 30, the Sourland Conservancy has every opportunity to become.

¹ *Governance as Leadership*, Richard P. Chait

² *The New Work of the Non-Profit Board*, Harvard Business Review; Barbara E. Taylor, Richard P. Chait, and Thomas P. Holland

APPENDIX A: SOURLAND INTERVIEWS

Summary Themes

- **Education programs (Train Station Series, Hikes, tours, Stewards) are important, effective, and what we do best.** Most thought that education, in its many forms, is what the organization does best. The Sourland Stewards is seen as an *education program* that can benefit from the allocation of additional resources.
- **Our ability to mobilize/motivate/rally the troops is powerful.** Our approach to communication with varied stakeholders is effective and an important tool for citizen action.
- **The unique, place-based, grassroots heritage of the organization is deeply valued.** The words *unique, distinct, neighborly, approachable, community, and place-based* are used to describe how people see the organization. Several comments suggest the mission should be revised to be more inspirational.
- **Pipeline work has increased our profile but raises a question of resource allocation.** Recent work on the Quarry, Sourland Stewards, Deer Management is seen as having real impact and is important work, however questions arise about the allocation of limited staff resources and how to leverage much-necessary resources for legal, policy and science-based expertise.
- **Current budget is not adequate to attain our goals *and* not sustainable without reprioritizing those goals.** Financial security is the single most important goal for the next three years. Several suggest a hard look at the two events and their ROI.
- **The board needs to be more engaged, diverse, and younger.** Many spoke about a board where 80% of the work was being done by 20% of the people and a need to have more diverse professional expertise represented at the board table.
- **Staff is valued.** There are a number of comments about resource allocation and being more strategic about work.

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APPENDIX B: INTERVIEW SCHEDULE

Day	Date	Phone/Meet	Interview
Monday	10/12	Phone Meeting Phone	Tom Seessel Marylou Ferrara Jim Amon
Tuesday	10/20	Meeting Meeting Meeting	Joanna Fiori Jennifer Bryson Caroline Katmann
Wednesday	10/21	Meeting Phone Phone Phone	Laurie Cleveland Sandy Simpson Gery Juleff Cliff Wilson
Wednesday	11/4	Phone Phone Phone	Pat Sziber Marian Fenwick Marcia Maguire
Monday	11/9	Phone Phone Phone Phone	Mary Galioto Jeff Mechanic/Julia Lisa MacCollum Gary Johnston
Tuesday	11/10	Phone Meeting Phone	Jared Flesher Ray Disch Bob Cibulskis
Wednesday	11/11	Phone	Tim Johnson
Wednesday	11/18	Meeting	Lise Thompson
Friday	11/20	Phone	Tracy Carluccio

APPENDIX C: INTERVIEW QUESTIONS

Mission and Impact

1. What is the most effective way the Conservancy carries out its mission?
2. Do opportunities exist for the organization to improve its impact?
3. What type of organization does the region need to protect the Sourlands?

Operational Structure

4. Do you believe that the organization can fulfill its mission on a budget of \$130,000 and a staff of 2 full-time people?
5. What should be the primary goal for the next three years?
6. If you could change one thing about the organization, what would it be?
7. What committees function the most effectively? *(omitted for non-trustees)*
8. Are you confident in the staff's ability to advance the mission of SC? *(omitted for non-trustees)*

Competitive Niche

9. What differentiates the Sourland Conservancy among other organizations?
10. Within the last two years, what was the most important regional contribution the organization made?
11. What does the Sourland Conservancy do best?
12. What should they be doing best?

Governance *(omitted for non-trustees)*

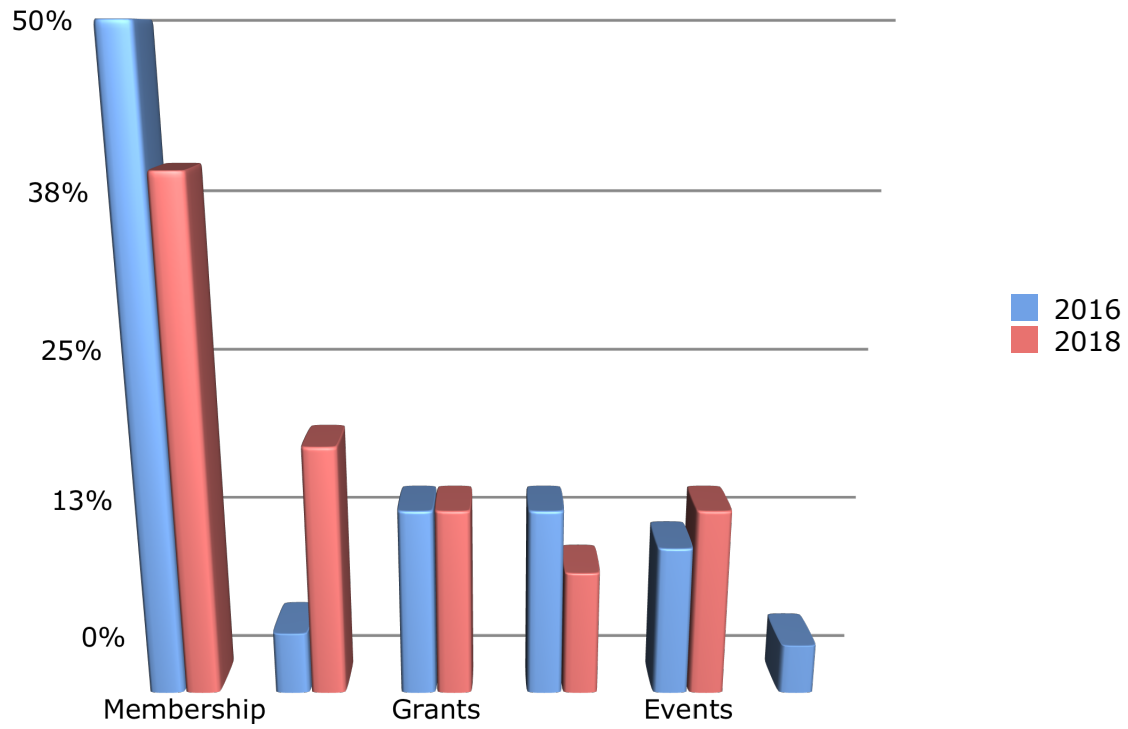
13. Is the board composite adequate to achieve the goals of the SC?
14. Do you feel that your talents/expertise are being effectively used?
15. If the organization received an unanticipated gift of \$100,000, where would you allocate it?

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APPENDIX D: STRUCTURE OF RESPONSIBILITIES
Strategic Planning Process

CONSULTANT	WORKING GROUP	INTERVIEWS	FULL BOARD
Interview each trustee and targeted stakeholders centered on the “core questions”	Identify key questions to answer during process	Discuss individual perceptions about the Sourland Conservancy’s niche, impact, and potential.	Maintain respectful and inclusive throughout the process
Provide contextual information that might bear on the strategic review including information on the “marketplace”, governance/ leadership, and funding	Vet key concepts and common themes from interviews and subcommittees		Review and ultimately adopt the final plan
Prepare and present a final report of the recommendations to the full board to include priority goals, objectives and tasks presented around a three-year timeframe – and implications for funding, staffing and governance	Review final recommendations in preparation for full board review		

APPENDIX E: REVENUE PROJECTIONS
\$175,000 Budget (2016) vs. \$250,000 Budget (2018)



APPENDIX F: PROPOSED ORGANIZATION CHART

