



## Strategic Plan 2011 - 2013

### The District's Mission

The District's current mission statement continues to serve the organization well:

***The Grand Traverse Conservation District inspires exploration, appreciation and conservation of our natural world by all who live, work, and play in it.***

### The District's Vision

The District has a strategic ambition for itself, seeing its future in this way:

***The Grand Traverse Conservation District is the leader in providing responsive services to gain a commitment from the diverse communities it serves to sustain, improve and preserve the quality of our natural environment.***

### The District's Values

The work of the District is reflective of these guiding principles:

- ***We interact with others in a respectful and open manner, with honesty and integrity***
- ***Our advice, decisions and actions are responsive and responsible, based upon our understanding of the current science***
- ***Our services, products and information are high quality and cost-effective***
- ***We are driven by the needs of our natural environment and the needs of those who seek our services***
- ***We believe that the best approach to our work comes from collaborating and partnering with other organizations, other expertise, and the communities we serve***

- *We focus our work to achieve changes in behavior that will help all of us to sustain, improve and preserve the quality of our natural environments.*
- *We actively demonstrate stewardship of our natural resource through our work and our daily actions.*

### **Outcomes to be Achieved**

The board has identified the following as outcomes to be addressed over the next three years:

1. Increase the community's appreciation and respect for our natural resources
2. Increase the community's knowledge of how to be good stewards of our natural resources
3. Increase the community's motivation to be good stewards of our natural resources
4. Increase the community's adoption of good stewardship practices.
5. Restore, manage & protect natural resources in our communities with a primary focus on the Boardman River and the parklands we currently manage.

These outcomes speak to the District's current focus on reconnecting the community with their natural resources in meaningful ways and on furthering their stewardship of those resources. For the next three years our primary focus will be on the stewardship of water resources.

### **What "Stewardship" Means to Us**

Environmental Stewardship is the nurturing and management of our natural resources – by individuals, organizations and communities - to achieve and maintain a healthy and productive natural environment for current and future generations.

### **How We Will Do This**

We will achieve the above outcomes by implementing programs that:

1. Incorporate creative approaches to revenue generation; and/or that are self-sustaining;
2. Engage as many volunteers as our capacity allows; providing each volunteer with adequate training, clear guidance, fulfilling experiences and ample recognition and appreciation for their contribution;
3. Are integrated with each other such that our hands-on conservation work involve as many educational opportunities as possible – and visa versa;
4. Are constantly improving using stakeholder input and other metrics as bases for making program improvements.

## THE CONTEXT FOR PLANNING

The District has accomplished a great deal in the last several years to position itself for the future. The construction of the Nature Center has been completed. A more comprehensive approach to education services has been launched. A management team structure has been created and considerable staff and team development has been undertaken. The board has grown and learned more about what its responsibilities are for the governance of the organization. These are all major accomplishments to be celebrated!

The successful implementation of this next strategic plan will be crucial to the long-term viability of the organization. Implementation will be done in the face of several significant organizational realities:

1. The organization is operating under an adopted deficit budget and anticipates a continuing budget deficit for an additional year or two.
2. The Executive Director has announced his intention to retire in one year, resulting in a succession of leadership.
3. The Development Coordinator has left the organization, leaving a temporary gap in the staffing for fund development.
4. A change in structure has created a new position, the Director of Conservation. This position was filled in mid-November and will require significant time in orientation and adaptation to this new role.
5. Many programs are going to be “ramping up” to a new level of intensity per their implementation work plans.
6. The organization continues to have contractual obligations for services that must continue to be met .
7. Some of the line-staff is may be planning life-changing goals that may affect their employment relationship with the District.
8. Given the District’s ambitious plans and its current fundraising capacity to support those plans, the Board will need to rapidly increase its efforts in this area.

Addressing these realities while implementing an ambitious 3-year strategic plan will be full of challenges! Upon the advice of the planning consultant, some activities planned for the first year have been moved off into years 2 or 3 in the plan. There remains a great deal of work to be done by a staff that is going to be experiencing changes in leaders, in support roles and in the availability of resources. A potential 3-year budget deficit is possible. All program areas will be building business plans and analyzing opportunities for new revenue generation. Simultaneously, it is absolutely crucial that the Board re-ignites its passion to complement the efforts the staff will be making.

The plans outlined here attempt to address these realities while continuing to move the organization ahead. Strong governance, strong leadership and excellence in implementation will bring the organization to yet another new level of effectiveness.

# STRATEGIC PLAN FOR EDUCATION

**GOAL 1: INCREASE REVENUE:** to seek grants, fees for service, and create fund development opportunities that will increase revenue.

**BD – Board; CT – Conservation Team; ET – Education Team; MT – Management Team; DC – Development Coordinator ; GTSI – GT Stewardship Initiative Coordinator; MOS – Marketing & Outreach Specialist; ED – Executive Director; AA – Administrative Assistant**

Task or Activity	Assigned to	Done by	Status
<b>I. PROGRAM FEES</b>			
a. Analyze current program fees and develop new fee structure for all education	ET	Year 1	Underway
b. Solicit feedback from users on program fees	ET	Year 3	
<b>2. GRANTS &amp; DONATIONS</b>			
a. Create three-year fundraising plan to support GTSI, NEST and EE operations	ET with DC	Year 1	
b. Write at least 3 grant proposals per year to support EE programs	ET	Years 1-3	
c. Solicit major donors to support EE programs	ET	Years 2, 3	
d. Include a program evaluation/CQI line item in each grant budget request	ET	Years 1- 3	

**GOAL 2: ENHANCE USE OF VOLUNTEERS:** develop and implement ways in which volunteers can be used to deliver service, or support the following activities: administration, marketing, fund raising or Continuous Quality Improvement

Task or Activity	Assigned to	Done by	Status
<b>1. STAFFING PLAN FOR VOLUNTEER COORDINATION</b>			
a. Create staffing plan to clarify roles of lead and back-up staff in volunteer management efforts for each group of volunteers	MT	Year 1	
b. Pursue funding for full-time Volunteer Coordinator	DC/ET	Until obtained	
<b>2. VOLUNTEER DATA MANAGEMENT</b>			
a. Review volunteer database & identify missing information	Per staffing plan	Year 2	
b. Review functionality of etapestry for organization's needs; provide training in selected data base per staffing plan	↓	Years 2 - 3	
c. Develop ongoing data management protocol	↓	Years 2 - 3	
<b>3. VOLUNTEER RECRUITMENT &amp; TRAINING</b>			
a. Identify and prioritize possible volunteer roles in EE	ET	Year 1	
b. Create job descriptions for each of the high priority volunteer roles in EE	↓	Year 2	
c. Determine volunteer training needs and create training plans for each volunteer role	↓	Year 2	
d. Implement volunteer training programs for each group of volunteers	↓	Years 2-3	
e. Implement volunteer training program per NEST project	↓	Years 1-3	
<b>4. STEWARDSHIP &amp; FEEDBACK</b>			
a. Enhance stewardship/recognition/appreciation plan for volunteers (events, thank-you notes, recognition in newsletters and in Nature Center, etc.)	MT, DC, MOS	Year 2	
b. Implement enhanced stewardship/recognition/appreciation plan	Per staffing plan	Year 2-3	
c. Study the impact that volunteer management has on program costs	MT	Year 3	

**GOAL 3: CREATE INTEGRATION ACROSS PROGRAMS:** within existing program activities, utilize the services/programs and approaches from other areas of the organization to enhance service delivery. Use existing program activities to market other services/programs

Task or Activity	Assigned to	Done by	Status
<p><b>1. PLANNING &amp; ADMINISTRATION</b></p> <p>a. Develop regular meeting schedule with EE and Conservation staff to maximize opportunities for integration</p> <p>b. Develop reasonable and effective community engagement plan for Year 1 and expand each year</p> <p>c. Develop organizational stewardship messages</p>	<p>ET &amp; CT</p> <p>ET &amp; CT</p> <p>ET, CT, MOS</p>	<p>Year 1</p> <p>Years 1-3</p> <p>Years 2 &amp; 3</p>	
<p><b>2. PUBLIC PROGRAMS &amp; VOLUNTEER ENGAGEMENT</b></p> <p>a. Incorporate content and stewardship messages from Conservation Team into public programs, with more programs per year that are closely aligned with work of Conservation Team</p> <p>b. Optimize educational impact of volunteer engagement in conservation activities</p> <p>c. Use exploration and celebration of conservation activities as part of volunteer/donor appreciation events</p>	<p>ET &amp; CT</p> <p style="text-align: center;">↓</p> <p>Per volunteer staffing plan</p>	<p>Years 1-3 per community engagement plan</p> <p style="text-align: center;">↓</p> <p>Years 2-3</p>	
<p><b>3. SCHOOLS, GROUPS &amp; DAY CAMPS</b></p> <p>a. Engage Grand Traverse Stewardship Initiative (GTSI) participants in GTCD's conservation work</p> <p>b. Incorporate content and stewardship messages from Conservation Team into all EE programs</p> <p>c. Provide hands-on conservation-related opportunities for schools, groups and day camp students</p>	<p>GTSI, ET, CT</p> <p>ET</p> <p>CT</p>	<p>Years 1-3</p> <p>Years 2-3</p> <p>Years 1-3</p>	
<p><b>4. SIGNAGE &amp; EXHIBITS</b></p> <p>a. Collaborate on any new interpretive/navigational signage</p> <p>b. Create plan for exhibits and hands-on activities in Nature Center gallery focused on existing public parklands, Boardman River restoration, invasive species and water stewardship.</p>	<p>ET &amp; CT, MOS</p> <p>TBD</p>	<p>Years 1-3</p> <p>Year 3</p>	

**GOAL 4: ESTABLISH CONTINUOUS QUALITY IMPROVEMENT:** identify and adopt outcomes for programs/services and create mechanisms that give ongoing feedback about performance to support ongoing quality improvement.

Task or Activity	Assigned to	Done by	Status
<p><b>I. FEEDBACK FORMS &amp; PROGRAM EVALUATION</b></p> <p>a. Create/update feedback forms for each education program with quantitative and qualitative questions supporting CQI</p> <p>b. Analyze input and modify programs accordingly</p> <p>c. Develop CQI plan for all programs, including pre- and post-program surveys to evaluate changes in content knowledge, connection with the natural world and likelihood of behavior change</p> <p><b>2. SIGNAGE &amp; EXHIBITS</b></p> <p>a. Update Nature Center gallery feedback form &amp; create receptacle for receiving same</p> <p>b. Develop CQI plan for interpretive signage and navigational signage on NER and other parklands</p> <p><b>3. VOLUNTEER PROGRAM</b></p> <p>a. Develop &amp; implement evaluation forms for all volunteer training programs</p> <p>b. Develop general volunteer survey and send to all active volunteers</p> <p>c. Modify volunteer program in accordingly</p> <p>d. Develop CQI plan for volunteer performance</p>	<p>ET</p> <p>ET</p> <p>ET</p> <p>ET</p> <p>ET, CT</p> <p>ET</p> <p>ET</p> <p>ET</p> <p>ET</p>	<p>Year 1</p> <p>Years 2 - 3</p> <p>Year 3</p> <p>Year 3</p> <p>Year 3</p> <p>Year 1</p> <p>Year 2</p> <p>Year 3</p> <p>Year 3</p>	

# STRATEGIC PLAN FOR CONSERVATION

**GOAL 1: INCREASE REVENUE:** to seek grants, fees for service, custom product sales, and create fund development opportunities that will increase revenue.

Task or Activity	Assigned to	Done by	Status
<b>1. DEVELOP BUSINESS PLAN CONSISTENT WITH STRATEGIC GOALS</b>	CT	Year 1	
<b>2. CLARIFY ROLE IN BOARDMAN STEWARDSHIP</b>			
a. Establish “niche” in Boardman River Stewardship/Dams (has implication for org identity)	CT	Year 1	
<b>3. RENEW/STRENGTHEN CONTRACTS FOR SERVICES</b>			
a. Develop true costs of services to incorporate in contract renewals.	CT	Years 2 - 3	
b. Renew contracts	CT	Year 3	
<b>4. PURSUE GRANTS FOR PROGRAM SUPPORT</b>			
a. Participate in foundation cultivation and applications, to include funding that supports program integration	CT	Years 1-3	
b. Determine cost/benefit of ISN program and cultivate sources of funding for program continuation if appropriate	CT	Year 3	
c. MI Water Stewardship Program continuation – advocate for the clientele base to support renewal of enabling legislation.	CT	Year 2	
d. Write at least one grant for each resource management contract	CT	Years 1-3	
e. Include a program evaluation/CQI line item in each grant budget request	CT	Years 1-3	

**GOAL 2: ENHANCE USE OF VOLUNTEERS:** develop and implement ways in which volunteers can be used to deliver conservation/stewardship services, or support the following activities: administration, marketing, fund raising or Continuous Quality Improvement – *SEE THIS GOAL FOR EDUCATION*

**GOAL 3: CREATE INTEGRATION ACROSS PROGRAMS:** within existing program activities, utilize the services/programs and approaches from other areas of the organization to enhance service delivery. Use existing program activities to market other services/programs

Task or Activity	Assigned to	Done by	Status
<p><b>I. PLANNING &amp; ADMINISTRATION</b></p> <p>a. Develop regular meeting schedule with EE and Conservation staff to maximize opportunities for integration</p> <p>b. Develop reasonable and effective community engagement plan for Year 1 and expand each year</p> <p>c. Develop organizational stewardship messages</p> <p><b>2. USE SEEDLING SALE AS MODEL FOR INTEGRATION</b></p> <p>a. Assign Seedling Sale and Plant Sale to ISN and have greater involvement from Ed Team in developing programs around it</p> <p>b. Develop business plan for Seedling Sale/Plant Sale</p>	<p>ET &amp; CT</p> <p>ET &amp; CT</p> <p>ET, CT, MOS</p> <p>CT, ET</p> <p>MT</p>	<p>Year 1</p> <p>Years 1 - 3</p> <p>Years 2 - 3</p> <p>Year 2</p> <p>Year 2</p>	

**GOAL 4: ESTABLISH CONTINUOUS QUALITY IMPROVEMENT:** identify and adopt outcomes for programs/services and create mechanisms that give ongoing feedback about performance to support ongoing quality improvement.

Task or Activity	Assigned to	Done by	Status
<b>I. OBTAIN FEEDBACK FROM STAKEHOLDERS</b>			
a. Develop feedback & usage numbers protocol for conservation programs (as part of the business plan)	CT; consultant	Year 2	
<b>2. CONSERVATION PROJECT IMPROVEMENT</b>			
a. Continue to monitor past stream-bank restoration and conservation projects to determine where improvements can be made	CT	Years 1 - 3	
b. Develop CQI models for all conservation projects	CT	Year 3	

# STRATEGIC PLAN FOR IDENTITY

**GOAL 1: ESTABLISH CONSISTENT IDENTITY OF THE DISTRICT:** make a determination about the name of the organization to continuously solidify recognition of the organization within the communities and audiences it serves.

Task or Activity	Assigned to	Done by	Status
<b>I. DEVELOP PLAN FOR ESTABLISHING IDENTITY</b>			
a. Acquire expertise to develop a plan of action for identity and branding	ED, MOS, BD	ASAP	
b. Develop action plan for establishing the identity of the district	ED, MOS	ASAP	

**GOAL 2: Establish the organization Brand:** Reduce confusion between organizations among community members; promote new brand.

Task or Activity	Assigned to	Done by	Status
a. Implement action plan	MOS	Start in year 1	
b. Refine brand document based on completion of action plan	MOS	Year 1	
c. Develop annual communications/marketing plan	MOS	Years 1 - 3	
d. Revise promotional materials to reflect new brand	MOS	Year 1	
e. Strengthen messaging through in-services, practice and key message development	MOS, MT	Year 1	

# STRATEGIC PLAN FOR FUND DEVELOPMENT

**GOAL 1: Recruit new donors:** Build the base of support by soliciting visitors, program participants, volunteers, and purchasing mailing lists

Task or Activity	Assigned to	Done by	Status
a. Promote opportunities (brick sales, memberships, etc. to give at each program, work bee, front desk, etc.)	DC, all staff, docents where appropriate	Year 1	
b. Enhance direct mail program	DC	Year 1	
c. Encourage volunteers to become donors, e.g., invite volunteers on special tours to encourage support	DC	Year 1	

**GOAL 2: Increase level of support from current donors**

Task or Activity	Assigned to	Done by	Status
a. Enhance annual giving program	DC, AA	Year 1	
b. Refine major gifts program/effort	DC, BD	Years 2 - 3	
c. Develop planned/legacy gift program	DC, BD	Year 3	

**GOAL 3: Establish membership program:**

Task or Activity	Assigned to	Done by	Status
a. Research other successful membership programs	DC, volunteers	Year 1	
b. Establish and implement membership levels & benefits	DC, MT	Years 1 - 2	
c. Establish protocol for GTCD vs. NC & how to steward relationship with current donors vs. members	DC, MT	Years 1 - 2	
d. Create membership (NC) brochure	DC, MOS	Year 2	

**GOAL 4: Enhance fundraising committee with additional volunteer members:** Focus on goals within this plan; members of this committee will not be charged with engaging the rest of the board in fundraising activities at this time.

Task or Activity	Assigned to	Done by	Status
a. Recruit additional committee members	DC, BD	Years 2 - 3	
b. Engage committee members actively to support fund development activities	DC	Years 2 - 3	

**GOAL 5: Nurture a culture of philanthropy among board and staff:** provide tools and opportunities for board and staff to support fund development activities in ways that allow them to successfully contribute to the financial stability of the organization

Task or Activity	Assigned to	Done by	Status
a. Achieve full participation by all board members as donors	ED, DC, BD MT	Year 1	

b. Achieve full participation by all staff members as donors	DC	Year 2	
c. Develop talking points “cheat sheet” for board and staff to use in sharing the messages about the organization with others	DC, MOS	Year 2	
d. Create opportunities for board and staff members to meet with individuals and groups of donors to discuss the work of the organization	DC	Year 2	
e. Create opportunities for board and staff members to participate in other fund development activities, e.g., making thank you calls, signing letters, etc.	DC	Year 2	

**GOAL 6: Enhance/expand foundation relationships:**

<b>Task or Activity</b>	<b>Assigned to</b>	<b>Done by</b>	<b>Status</b>
a. Seek referrals for new prospective foundation funding sources from foundation experts who are already partners	MT	Year 1	
b. Develop plan for foundation cultivation	DC	Year 1	
c. Submit proposals as deemed appropriate per the plan	MT	Years 2 - 3	