

## **9/28/15 DRAFT FOR CONSERVELAND.ORG**

# **PENNSYLVANIA LAND TRUST ASSOCIATION STRATEGIC PLAN FOR 2016-2020**

### **PALTA'S VISION**

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The Pennsylvania Land Trust Association envisions future generations enjoying—undiminished—Pennsylvania's natural areas and open spaces. The Association envisions communities having deep connections with their urban, suburban, and rural lands. It envisions people recognizing the health, safety, recreational, economic, and other benefits delivered by land conservation.

### **PALTA'S MISSION**

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The Pennsylvania Land Trust Association helps people conserve the lands needed for healthy, prosperous, and secure communities—the forests, farms, parks, urban gardens, and other green places that safeguard our drinking water, prevent flooding, protect wildlife, provide recreational and economic opportunities, and preserve scenic beauty and community treasures. The Association accomplishes this by helping nonprofits and local governments improve their effectiveness and efficiency in acquiring and stewarding land and easements, advancing sustainable land use practices, and connecting people to the outdoors; the Association also fosters public understanding of conservation, advocates for sound governmental policy, and leads state and national endeavors to achieve far-reaching advancements in conservation.

### **PALTA'S GOALS**

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- Increase the pace of land conservation.
- Improve the quality and efficiency of land conservation work.
- Ensure that land conservation is lasting.
- Build strong land conservation organizations.
- Improve land use planning and advance sustainable development practices.
- Raise public understanding and support for conservation.
- Align public policy with conservation principles.

### **Who is PALTA?**

More than 70 land conservation organizations count themselves as dues-paying members of the Pennsylvania Land Trust Association. These organizations elect the Board and set PALTA's purposes. The organizations in turn count more than 100,000 Pennsylvanians as members and contributors.

PALTA was created by land trust leaders who recognized the value of an entity that would address and focus on the broad needs of the land conservation movement—to take on activities that no one organization could effectively handle or wish to handle on its own.

### **PALTA'S STRATEGIES**

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- A. Build tools that facilitate the pursuit of excellence in the accomplishment of effective and efficient conservation acquisitions, land stewardship, land use planning, and organizational operations.
- B. Train, deliver technical assistance, and foster stronger communications and relationships to empower and inspire people to achieve more in their conservation work.
- C. Change and improve the systems in which conservationists operate to achieve better conservation outcomes and keep conservation and land trusts vital in a changing world.
- D. Advocate for better public policies impacting land conservation and water resource protection.
- E. Build a more effective Pennsylvania Land Trust Association.

## **Actions Supporting Strategy A**

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Build tools that facilitate the pursuit of excellence in the accomplishment of effective and efficient conservation acquisitions, land stewardship, land use planning, and organizational operations.

1. Create and maintain model legal documents, policies, and ordinances.
2. Create and maintain technical guides.
3. Improve the utility of ConservationTools.org.

### **1. Create and maintain model legal documents, policies and ordinances.**

Create, maintain and improve model grants of conservation easement, grants of access easement as well as model documents accessory to easement acquisition and stewardship.

Create, maintain, and improve other model legal documents for use in conservation real estate transactions.

Create, maintain, and improve model land use ordinances.

Create, maintain, and improve model organizational policies that advance the practice of conservation.

Create, maintain, and improve other model documents that advance the effectiveness and efficiency of conservation organizations.

### **2. Create and maintain technical guides.**

Publish new guides.

Update, expand or otherwise improve previously published guides.

### **3. Improve the utility of ConservationTools.org.**

Identify needs of conservation organizations and local governments for guidance and resources and plan accordingly.

Post original PALTA content.

Identify and collect useful content from other sources and post and highlight it as appropriate.

Ensure productive user experiences; maintain security and the effectiveness of site functions in a constantly changing technological environment.

## **Actions Supporting Strategy B**

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Train, deliver technical assistance, and foster stronger communications and relationships to empower and inspire people to achieve more in their conservation work.

1. Provide training and networking opportunities.
2. Facilitate the creation and maintenance of peer networks.
3. Deliver technical assistance.
4. Deepen and broaden interactions and communications.

### **1. Provide training and networking opportunities.**

Manage the Pennsylvania Land Conservation Conference as Pennsylvania's *premier* annual training, networking and inspirational event for the advancement of land conservation.

Organize and sponsor webinars, seminars, roundtables, workshops and other events as dictated by conservation needs to supplement conference programming. Promote other organizations' offerings as appropriate.

Identify training needs of land conservation staff, board members, other volunteers, and advisors, and implement or partner on offerings to meet those needs.

### **2. Provide technical assistance.**

Deliver direct technical assistance by staff to the staff, volunteers, and advisors of conservation organizations and local governments via phone, email and in-person.

Manage the Conservation Easement Assistance Program. (The program provides small grants in support of quality conservation and public access easement transactions, easement amendments and restatements, baseline documentation and easement signage.)

Facilitate peer and consultant based technical assistance to conservation organizations and foster mentoring to build organizational strength.

Facilitate mergers and land trust collaboration where such actions present substantial potential to achieve significant operational efficiencies and better conservation outcomes.

### **3. Facilitate the creation and maintenance of effective peer networks.**

Manage the EAC (Environmental Advisory Council) Network, supporting the network at a level directly reflective of donor-support for the network.

Foster the creation and development of networks of other peer groups.

### **4. Deepen and broaden interactions and communications.**

Prepare and distribute educational materials to orient new board members of land trusts to PALTA and the broader conservation movement and to keep them informed during their tenures.

Use electronic communication tools (e.g. ConserveLand.org, email, social media, and future technologies) to provide conservation news and information for the public and to build online communities for conservationists.

Publish and distribute the ConserveLand newsletter to reach those who are not web-oriented and to reinforce web-based communications.

Keep PALTA focused on delivering high value to the land conservation community by keeping informed of land trust needs, policies, activities and expectations of PALTA via informal and *ad hoc* interactions as well as surveys.

## **Actions Supporting Strategy C**

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Change and improve the systems in which conservationists operate to achieve better conservation outcomes and keep conservation and land trusts vital in a changing world.

1. Help organizations adapt themselves to address changes in culture, demographics, and finance that can impact the success and meaning of conservation.
2. Promote private land trust movement policies, standards, and systems that advance conservation excellence.
3. Assist with improving the efficacy of these policies, standards, and systems, and ensuring that they don't unduly redirect resources away from direct conservation work or stifle initiative and experimentation in achieving conservation objectives.
4. Help build people's connections to the land.
5. Communicate to the public and key subsets to build

understanding of conservation.

6. Seek to identify and pursue opportunities to broadly improve upon the *status quo*.

**1. Help organizations adapt themselves to address changes in culture, demographics, and finance that can impact the success and meaning of conservation.**

Include in PALTA programming explorations of how cultural and demographic changes should be and have been considered in the delivery of conservation and related services by land trusts and local governments.

Include in PALTA programming explorations of how a land trust can better reflect the diversity of people in its service area in the make up of its board, staff, volunteer groups, and those directly served by the land trust.

Support land trusts in the broad array of activities—education, outdoor recreation, etc.—they may undertake in conjunction with and in support of their conservation acquisition and stewardship work by addressing these activities in PALTA training and events other PALTA efforts.

Engage younger people more deeply in land trusts and PALTA.

Create and distribute educational materials to help land trusts adapt to and reflect a changing world.

**2. Promote private land trust movement policies, standards, and systems that advance conservation excellence.**

Promote Land Trust Standards and Practices.

Facilitate sharing of experiences and discussion of issues amongst accredited land trusts and organizations pursuing accreditation.

Deliver technical assistance and training to help land trusts achieve conformity with Land Trust Standards and Practices and prepare for Accreditation.

Recognize accredited land trusts in PALTA's communications and provide information to non-accredited land trusts exploring accreditation.

Promote other policies for the land trust movement if and when their need becomes evident.

**3. Assist with improving the efficacy of movement policies, standards, and systems, and ensuring that they don't unduly redirect resources away from direct conservation work or stifle initiative and experimentation in achieving conservation objectives.**

Seek a leadership role and participate in the revision process for Land Trust Standards and Practices.

Continue to develop and communicate suggestions for the improvement of Land Trust Accreditation; take national leadership roles in advocating for improvements identified as important to Pennsylvania land trusts.

As appropriate, develop Pennsylvania-specific land trust movement policies and standards that help land trusts of all sizes and maturity strive for higher levels of excellence and efficiency.

**4. Help build people's connections to the land.**

Continue PALTA's leadership role in promoting outdoor recreation via Get Outdoors PA.

Promote other vehicles for connecting people to the land (e.g., nature play) as opportunities present.

**5. Communicate to the public and key subsets to build understanding of conservation.**

Identify and implement ways of framing land conservation that resonate with the public and that facilitate outreach to those who do not hold conservation as a core value.

Make presentations to key audiences and display PALTA materials at key locations and events.

Promote land conservation, sustainable land use practices and land trusts to the general public through a variety of communications channels.

Make available or facilitate the availability of geographic information regarding land trust service areas and conserved lands.

Build bridges with other sectors and organizations to find and build upon common interests supportive of conservation.

**6. Seek to identify and pursue opportunities to broadly improve upon the *status quo*.**

Engage the policy advisory committee, board, membership, and outside parties in looking outside the box for ways to better achieve conservation.

## **Actions Supporting Strategy D**

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Advocate for better public policies impacting land conservation and water resource protection.

1. Meet, educate, and build relationships with government officials.
2. Maintain a public policy agenda.
3. Make public investments in conservation the highest agenda priority.
4. Foster involvement by the people that make up PALTA's member organizations.
5. Advocate for better governmental policy.

### **1. Meet, educate and build relationships with government officials.**

Reach out to:

- state elected officials and their staff.
- state appointed officials and their staff.
- gubernatorial candidates and their campaigns.
- members of the Pennsylvania Congressional delegation and their staff.

### **2. Maintain a public policy agenda.**

Hold regular meetings of the policy advisory committee to help guide and implement PALTA's policy work (including advising the board on policy priorities).

On an as needed basis, convene attorneys deeply committed to conservation to advise PALTA on addressing judicial threats and opportunities for conservation.

Proactively identify and research potential policy issues and initiatives and formulate policy solutions.

### **3. Make public investments in conservation the highest policy agenda priority.**

Ensure continued public investments in conservation.

Increase the level of investment.



**4. Foster involvement by the people that make up PALTA's member organizations.**

Regularly invite member organizations to nominate their organizational leaders for policy advisory committee positions.

Keep communications channels with members wide open regarding PALTA policy positions and actions.

Engage member organizations in fostering relationships and communications between their board members, staff and supporters and legislators.

**5. Advocate for better governmental policy.**

Express and promote interests, concerns, positions and requests to policy makers and opinion leaders.

Enhance online outreach and advocacy functions.

Continue to build and maintain a network of organizations having intersecting agendas and work cooperatively to advance shared interests.

Engage in national advocacy efforts as appropriate. Maintain relationships with LTA and other conservation organizations active at the federal level to ensure that PALTA actions are consistent with the interests of the conservation movement and are calibrated to have maximum impact on the conservation issues of importance to Pennsylvania.

## **Actions Supporting Strategy E**

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Build a more effective Pennsylvania Land Trust Association.

1. Strengthen and diversify the funding base.
2. Refine ongoing PALTA fundraising activities.
3. Reorganize the management of PALTA's financial assets to reflect the growth of PALTA.
4. Make organizational changes to more fully utilize the resources, skills, talents and energies of board members, advisors, volunteers and staff.
5. Improve marketing and branding.

**1. Strengthen and diversify the funding base.**

Expand the annual financial support of member organizations to PALTA by an amount to be determined by the board.

Establish an endowment to help PALTA guard in perpetuity the legal and public policy underpinnings of conservation work in Pennsylvania.

Conduct campaigns to encourage land trust board member and supporter contributions to PALTA's endowment.

Develop and implement other strategies for increasing and diversifying PALTA revenues (e.g., add fundraising element to existing program or increase conference fees).

**2. Refine ongoing PALTA fundraising activities.**

Implement strategies to move individual contributors to higher giving levels as they renew their commitments to PALTA (e.g., regularly communicate with donors).

Refine the system of classifying memberships and sponsorships and providing recognition and benefits in association with contributions made.

Continue annual appeal to individuals, conference sponsorship solicitations, grant writing, and other present fundraising efforts.

**3. Reorganize the management of PALTA's financial assets to reflect the growth of PALTA.**

Establish a finance committee as a standing committee of the board.

Adopt policies regarding PALTA investments, reserve fund, endowment, and other financial matters.

**4. Make organizational changes to more fully utilize the resources, skills, talents and energies of board members, advisors, volunteers and staff.**

Design and implement as appropriate *ad hoc* task groups and advisory or honorary bodies to draw a larger pool of people into PALTA and its work.

Diversify the membership of the board of directors, seeking to move the board with its present predominance of land trust executive directors to one that retains majority representation by executive directors but includes more individuals with different backgrounds who are identified as being able to significantly help move the organization to a more stable financial footing.

**5. Improve marketing and branding of PALTA as an organization as well as its specific services (e.g., ConservationTools.org).**

Develop marketing materials, describing PALTA and its value to potential investors in its efforts.

Establish an outreach program to land trust board members and supporters.

Maintain a consistent look and feel to PALTA's electronic and print communications.

Promote to member organizations the use of a "member of the Pennsylvania Land Trust Association" message in their communications and the creation of web linkages to ConservationTools.org.

## **Implementation of the Strategic Plan**

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### Responsibilities

Staff are responsible for leading the implementation of Actions for Strategies A through D (regarding programmatic activities), and Action sets 2 and 5 of Strategy E (regarding organizational development). Actual tasks may be carried out by staff, board members acting as program volunteers, consultants and others as needed.

Responsibility for leading implementation of Action sets 1, 3, and 4 for Strategy E (regarding organizational development) sits with the board of directors.

Actual tasks may be carried out by board members, the board as a whole, staff, consultants and others as needed.

### Putting the Plan in Practice

The board of directors and staff will consider potential PALTA activities in the context of the strategic plan. The board will adopt annual budgets consistent with the plan.