
Practice 1B: Planning and Evaluation

- The land trust regularly establishes strategic goals for implementing its mission and routinely evaluates programs, goals and activities to be sure they are consistent with the mission.
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Practices 1A and 1B are the “planning practices” and specify the need for a clear mission statement and a process, such as a strategic plan, for establishing and evaluating land trust programs. A mission statement is important in that it embodies the work of the land trust and can be used in bylaws, in tax-exempt applications, in fundraising solicitations, and to explain the land trust’s work to the public. It forms the touchstone for the organization. Likewise, some form of forward-looking plan with strategic goals is also essential for a land trust. How complicated this process is, how long it takes and what it encompasses depend on the particular circumstances of each land trust. A young, small land trust may use a simpler and quicker planning process than an established organization with multiple programs and a large staff. In either case, planning enables a land trust to chart its future and ensure that it is able to meet the land protection and stewardship obligations it accepts. Both the mission statement and planning process should reflect the needs and priorities of the constituency the land trust serves.

Consistency with Mission

The work of defining the land trust’s mission and goals is meaningless if it does not also design programs and activities to achieve them. Unless the land trust has a process for keeping the mission and goals alive, it still runs the risk of getting off track, making ineffective use of its resources, or saying one thing and doing another.

There are two processes that provide convenient ways to determine if the land trust is on track with its mission and goals or if those goals need to change:

- **Development of the annual work plan.** Each year, the land trust should develop an annual work plan and budget for the upcoming year (see Standard 6). The tasks in the annual work plan should derive from the land trust’s mission and goals. It is helpful to the full board if the mission and goals are restated in the annual work plan, followed by the specific objectives for the year that are intended to achieve them. That way the board can ensure that the land trust’s activities are consistent with the mission and goals. Understanding how the land trust’s activities achieve its mission and goals also helps the land trust determine how and when to seize new opportunities that arise during the year.
- **Strategic planning and review.** The land trust should also periodically take a more in-depth look at its overall programs, its mission, its goals, and the changing circumstances surrounding its work and decide if it is on track in a larger sense. This is usually done as part of a strategic planning process or review of a strategic plan and

should occur every three to five years (depending on the land trust's growth and level of activity)—or sooner if there is rapid change, new opportunities or other factors that demand urgent attention.

If the land trust is continually aware of its mission and goals, its planning will be easier in the long-term. Incremental changes can be made as the land trust's programs evolve, and differences of opinion can be aired and dealt with as they arise. Letting the mission and goals go stale not only may diminish the land trust's effectiveness, but can also create a huge and difficult planning task for the organization when someone finally decides the matter must be dealt with again.

Of course, the land trust may change its mission and goals over time. But it should do this deliberately, not by chance, with a full discussion of why they should be changed and what the impacts of that change are likely to be. Whenever the organization changes its working statement mission and goals, it should also check to see if the new statement is consistent with the purposes outlined in its incorporation papers. If they are not, it should file to change its legal purposes as well.

The Importance of Strategic Planning

The mission statement described in practice 1A helps keep the organization on track, but does not provide the organization with sufficient direction. Every land trust also needs to develop more specific strategic goals and program plans to see that its mission is carried out.

The land trust's mission and goals are usually developed as part of a strategic or long-range planning process. How complicated this process is, how long it takes and what it encompasses depends on the particular circumstances of each land trust. Young, small land trusts may use a simpler and quicker process than an established organization with multiple programs and a large staff. They need to choose a narrow agenda that can establish an early record of success, and take prompt action to show results. As the land trusts' programs expand and become more complex, they will need to plan for a broader program and a longer timeframe.

A strategic planning effort does more than just establish mission and goals. In a typical planning process, the land trust board develops a common vision of what it wants the organization to become. From there, it establishes the land trust's overall mission or purpose. Then it establishes goals to achieve the mission, and activities that will begin to achieve the goals.

Many land trusts hire a consultant or facilitator to help them through all or part of a strategic planning effort. Several books are also available that can help a land trust through the process. A facilitator, however, can be especially helpful in the discussion of mission and goals. A facilitator enables everyone to participate (it is difficult for whomever is leading the discussion to also take part in it), helps ensure points of view are

not overlooked and should help minimize unproductive arguments or lengthy, draining discussions over unimportant points. This discussion, which essentially establishes a vision for the land trust's future, can be a powerful session that unites the board, and staff if there is one, toward a common end. A good facilitator can help the participants achieve this common vision.

Links to Other LTA Resources

- [Getting from Here to There: The Importance of Planning. A presentation for a strategic planning workshop, June 2002. A nice overview of all levels of land trust planning.](#)
- [“Investing in Strategic Planning”, Exchange, Winter 2002 \(Vol. 21 No. 1\)](#)
- [Strategic Planning for Small and All-Volunteer Land Trusts. Rally 2002 workshop.](#)

Links to Helpful Resources from the Alliance for Nonprofit Management

- [How Do I Use Retreats in the Planning Process?](#)
- [Should I Use an External Consultant?](#)
- [What Are the Key Concepts and Definitions in Strategic Planning?](#)
- [What Do I Need to Know Before I Start the Planning Process?](#)

Links to Helpful Resources from the Management Assistance Program for Nonprofits

- [Basic Guidelines for Successful Planning Process](#)
- [Basic Overview of Various Strategic Planning Models](#)
- [Basics of Action Planning \(as Part of Strategic Planning\)](#)
- [Basics of Writing and Communicating a Strategic Plan](#)
- [Developing Your Strategic Plan](#)
- [Framework for a Basic Nonprofit Strategic Plan Document](#)
- [Strategic Planning \(in Nonprofit or For-Profit Organizations\)](#)

Helpful Publications

- *The Board Members Guide to Strategic Planning*, by Fisher Howe and Howard H. Williams III, 1997. Published by the National Center for Nonprofit Boards.
- *Creating and Implementing Your Strategic Plan: A Workbook for Public and Nonprofit Organizations*, by John M. Bryson and Farnum K. Alston, 1996. Published by Jossey-Bass, Inc.

- *Field Guide to Nonprofit Strategic Planning and Facilitation*, by Carter McNamara, 2003. Published by Authenticity Consulting, LLC.
- One step-by-step guide to strategic planning is the *Strategic Planning Workbook for Nonprofit Organizations*, by Bryan W. Barry, 1986; revised and updated in 1997. Published by the Amherst H. Wilder Foundation.
- *Strategic Planning for Nonprofit Organizations: A Practical Guide and Workbook*, by Michael Allison and Jude Kaye, 1997. Published by Support Center for Nonprofit Management.
- *Strategic Planning for Public and Nonprofit Organizations: A Guide to Strengthening and Sustaining Organizational Achievement*, by John M. Bryson, 1995. Published by Jossey-Bass, Inc.

Sample Land Trust Strategic Plans

- [Evergreen Land Trust \(a fictional land trust\) – Sample Strategic Plan](#)
- [North Haven Conservation Partners \(ME\) – Strategic Plan](#)
- [Richmond Rural Land Preservation Trust \(RI\) – Strategic Plan for Initial Priority Goals](#)
- Sheepsfoot Valley Conservation Association (ME)
[Action Plans](#)
[Mission Statement and Goals](#)
- [Western New York Land Conservancy – Strategic Plan 2002-2005](#)

Other Examples from Land Trusts

- Vermont Land Trust
[Board-Staff Relationship: Monitoring Executive Performance](#)
[Governance Process: Annual Board Planning Cycle](#)

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