

This example can be used as a starting point to create a policy or other document for your own land trust, but should be altered as necessary to reflect your organization's unique circumstances using guidance found in the *Land Trust Standards and Practices Guidebook* text and corresponding Standards and Practices Curriculum.

Please Note: If you are using this material for accreditation purposes, see also [the Land Trust Accreditation Commission website](#) for additional information. To search for policies from accredited land trusts, insert <<accredited>> along with the search term (e.g., conflict interest policy accredited).

° Western New York Land Conservancy, Inc.

Strategic Plan 2002-2005

Dedicated to preserving the environmental heritage of Western New York

Service Area

Eight counties of Western New York, generally west of the Genesee River Valley: Erie, Niagara, Chautauqua, Cattaraugus, Orleans, Genesee, Wyoming, Allegany

Vision Statement

The Western New York Land Conservancy envisions a future in which significant areas of privately and publicly owned and managed open space, scenic resources, working lands and wildlife habitat are a cherished and protected part of the landscape and character of Western New York.

Mission Statement

The Mission of the Western New York Land Conservancy is to permanently protect and conserve land and associated environmental resources for future generations.

Organizational Values

- We believe in protecting land for the future.
- We believe in promoting voluntary, private, and personal opportunities to permanently protect land.
- We believe aquatic and wildlife habitat, open space, and working landscapes, as natural areas or as places to live, work, and recreate, are part of our environmental heritage and are essential for a good quality of life
- We believe it is important to balance private and public land interests
- We believe some open land has value for its own sake, not limited to its commercial usefulness.

Committee Structure:

Standing Committees

Executive: composed of the officers of the organization

Organizational Development

- Finance
- Fundraising
- Nominating
- Personnel

Conservation

- Acquisition and Implementation
- Monitoring and Land Management
- Open Access Programs

Outreach

- Membership
- Public Relations
- Special Events
- Education

Ad Hoc Committees

Litigation

Emerging Projects

GOAL 1

To build and manage an organization that has the fiscal and administrative capacity to operate in perpetuity as the stewards of the lands protected by the WNYLC. (By this we mean how do we develop and preserve resources, organize money and organize people to allow us to carry out our mission of taking care of the land)

Objective 1: Acquire appropriate human resources to effectively and efficiently manage the organization. (Personnel Committee)

Action Steps:

- A. Assess personnel needs and options for filling them including: full time and part time staff, volunteers and contract labor. Priority will be given to administrative (data entry and bookkeeping) needs. (Year 1) Implement phase one of the staffing plan (Year 2)
- B. Determine if an executive director is needed instead of, or in addition to, the land protection manager position. (Year 1) Based upon this assessment either :
 - create job description for executive director and begin search process
 - or
 - revise job description of land protection manager and provide for additional training and professional development as appropriate (Year 2)

Objective 2: Increase organizational capacity in the utilization of members and volunteers (Outreach Committee/Membership Sub-committee)

Action Steps:

- A. Create and adopt a membership plan including, at minimum, the following
 - 1. Revamp and simplify membership levels (Year 1)
 - 2. Establish benefit and incentive programs for membership levels (Year 1)
 - 3. Survey membership and determine if there is an acceptable level of understanding of the goals and activity of this organization. (Year 1)
 - 4. Increase renewal rate to 75% in Year 1, and 90% by Year 3
 - 5. Establish new member goals and membership upgrade goals (Annual)

- B Create a volunteer coordinator position (Year 2), identify an available person with specific skills in working with volunteers and engage this person in the following tasks
 - 1. Inventory membership volunteer skills (Year 2)
 - 2. Develop a plan for follow-through for recruiting, assigning, training and acknowledging volunteers (Year 3)
 - 3. Work as liaison between Board committees, staff, and members to draw on volunteers to match with identified tasks at hand. (Year 3)

Objective 3: Strengthen the overall education and development of the Board of Directors

Action Steps

- A. Review "Member's Resource Manual" with each committee with the goal of refining and updating it as well as linking specific duties to annual plan of work.

- B. Provide an ongoing program of Board training to include:
 - 1. Core presentations providing info needed by board (one in Year 1, two annually thereafter)
 - 2. Offer short presentations (15 to 20 minutes) at each board meeting on topics that are relevant to land trusts
 - 3. Visit other land trusts. Provide strong encouragement for board members to attend the LTA Rally, etc.
 - 4. After board has identified priority project areas, arrange board member tours to areas to develop an appreciation for the reasons for prioritization

- C. Revise the committee structure to more effectively address organizational responsibilities
 - 1. Establish criteria for committee representation
 - 2. Expand membership (non-Board) representation on standing and special committees

Objective 4: Adopt a Development Plan (goal to have income identified two years out at all times)

Action Steps:

- A. Create a Funding Plan
 - 1. Identify potential sources of income including but not limited to entrepreneurial activities, donor solicitation , grants, etc.
 - 2. Make appropriate personnel assignments for pursuing each funding stream
 - 3. Create a tracking system for reporting and monitoring progress on funding efforts

- B. Develop a policy for endowments, land sales and administration of funds

- C. Define several types of roles for board members, staff and others in pursuit of more income
 - a. Provide board training for each identified role
 - b. Explore "Special products" to break out of the "begging-for-money" approach (eg. From Costa Rican rain forest, Buffalo Zoo, Heifer Project, USA)

- D. Create evaluation process for each fund raising activity; ie true cost accounting, impact on membership retention, long term sustainability

Objective 5: Maintain fiscal integrity of the WNYLC and manage the organization's finances for maximum program benefits and employee security and stability.

Action Steps:

- A. Prepare and approve annual fiscal resolutions and budgets in timely manner
 - 1. Approve annual fiscal resolutions at 1st Board meeting of the fiscal year.
 - 2. Complete draft budget for each fiscal year and present at the last Board meeting of the fiscal year to be adopted at the first meeting of the fiscal year.

- B. Conduct Annual audit in timely fashion
 - a. Working with contracted independent auditors, complete annual financial reports by April 15th of each year and post on web page.
 - b. Complete, arrange for auditor review and file annual IRS Form 990 and NYS Charities Registration forms by May 15th of each year.

- C. Maintain adequate umbrella liability insurance (including property insurance).

- D. Maintain appropriate BENEFITS FOR EMPLOYEES
 - a. Health, disability and unemployment insurance for all WNYLC employees.
 - b. Explore establishing a 401(K) or equivalent retirement pension package for WNYLC employees.

- E. Re-establish WNYLC Board Designated Operating Reserve with a minimum of 1 year of staff funding.

- F. Remain in full compliance with the financial and accounting standards recommended in the Land Trust Alliances "Standards and Practices" in addition to Generally Accepted Accounting Standards (GAAP) for non-profit organizations.

GOAL 2

To promote permanent, voluntary land conservation in the eight county region of Western New York. (by this we mean how do we tell our story)

Objective 1: To advance and maintain the professional and public image of the Western New York Land Conservancy and to inform the public about the work of the Western New York Land Conservancy.

Action Steps:

A. Newsletter

1. Redesign and send semi-annually
2. Create a monthly or bi-monthly e-newsletter.

B. Media Relations

1. Begin bimonthly general news releases in January 2003
2. Update the current media list including the addition of other environmental organizations
3. Special events and projects will be announced to the media on an as needed basis.

C. Web Site to be updated and redesigned (ongoing)

D. New Membership Brochure to be developed by October 2002

E. Publicity Materials to be developed by end of February 2003

G. Speakers Bureau

1. slide presentation finalized by end of March 2003
2. Power Point presentation finalized by February 2004

Objective 2: To expand outreach services in areas of greatest need, either geographically or in terms of population group.

Action Steps:

- A. Make sure that there is regular and effective service to all eight counties, eliminating redundancy.
 - a. Keep an accurate and complete record of all Outreach activities
 - b. Assess impact of Outreach activities in terms of total contacts, new members, information dissemination, etc.
 - c. Outreach projects undertaken should include a cost/benefit analysis.

- H. Work with community agencies and organizations to develop outreach partnerships, explore and implement new outreach possibilities and other new programs.

- C. Organize Western New York Land Conservancy special events:
 - 1. Annual Dinner
 - a. revamp the format of the dinner to at least cover costs
 - b. implement and evaluation of the event in terms of impact on member education, donor enhancement, media attention, etc.
 - 2. Annual "Friend Raiser" - A Day in the Country
 - a. set new member acquisition goals for the event and assess effectiveness of the event in achieving these goals
 - b. increase the identification of the event with the Western New York Land Conservancy in the mind of participants
 - 3. Participate in various other organizations' events with our displays, statements of support, attendance, etc.
 - a. allocate a specific amount of financial and human resources to such events in each annual budget and work plan.
 - b. Evaluate the impact of participation in these events through a simple cost/benefit analysis
 - 4. Establish criteria for adopting non-educational special events that include clear goals for new memberships to be acquired, information to be disseminated and dollars to be raised

D. Plan additional Professional development and public awareness activities and events:

1. Arrange seminars with attorneys, financial planners &/or tax assessors
2. Annually conduct at least one seminar/workshop in each of the 8 counties (at the local Cornell Coop Extensions or another appropriate venue).
3. Organize meetings with the residents neighboring Western New York Land Conservancy holdings.
4. Conduct a round of informational meetings with various Western New York charitable foundations and corporate donors.

GOAL 3

To identify important lands for protection and preservation, and to acquire, monitor and manage those which are appropriate for perpetual stewardship by the Western New York Land Conservancy, alone or in collaboration with others.

(By this we mean how do we identify, acquire, manage, and/or monitor land)

Objective 1: To preserve and steward 5000 acres of significant lands in Western New York by 2005 leading to a doubling of protected lands in the future

Action Steps:

- A. Build on existing relationships in areas where Western New York Land Conservancy currently has lands under protection.
 - 1. Identify potential easement donors
 - 2. Proactively promote additional conservation easements
 - 3. Engage current land donors and supporters in spreading the message of the value of land conservation

- B. Identify priority areas in counties with little Western New York Land Conservancy presence to date.

- C. Continue exploring options for urban and rural projects and projects with environmental justice benefits
 - 1. Greenways
 - 2. Community gardens
 - 3. Riparian corridors and shorelines
 - 4. Urban greenspace

Objective 2: To create a system for prioritizing acquisition and land protection activities while retaining the flexibility to respond to significant conservation opportunities that present themselves.

Action Steps:

- A. To review and evaluate existing acquisition criteria and Procedures. Evaluation to include at minimum
 - 1. Geographic considerations
 - 2. Cost/benefit analysis (including potential long term legal concerns)
 - 3. Environmental significance
 - 4. Appropriateness for the mission of the organization

- B. Prioritize acquisition and land protection work for interest areas
 - 1. Buffalo Creek Watershed Riparian Corridor (Erie County)
 - 2. Cattaraugus Creek Watershed Riparian Corridor (Erie, Catt. & Chaut. Counties)
 - 3. Grand Island Shoreline and Riparian Corridors (Erie County)
 - 4. Eighteenmile Creek Watershed (Erie County)
 - 5. Niagara Escarpment & Niagara River Corridor (Niagara County)
 - 6. Amherst Farmland Protection Project (Erie County)
 - 7. Marilla Farmland Protection Project (Erie County)
 - 8. Other Farmland Protection Projects through the 8 County Service Area
 - 9. Klydel Wetlands (Niagara County).
 - 10. New Lake Ontario/Lake Erie Shoreline, Lake Erie Gorges
 - 11. Areas adjacent to or linking current WNYLC holdings and other protected lands

- B. To develop and manage Kenneglenn Scenic and Nature Preserve as a model for future Open Access Properties
 - 1. Complete Master Plan
 - 2. Implement Phase I of Master Plan
 - 3. Develop Partnerships with other organizations to provide services/programming on site
 - 4. Implement Phase II of Master Plan

D. Implement the use of latest technology, including geographic information system (GIS) tools for project planning, acquisition support, tracking, management and monitoring.

Objective 3: To remain in full compliance with the Land Trust Alliance “Standards and Practices” with respect to conservation acquisition and monitoring as well as all other aspects of organizational operations.

Action Steps:

- A. Maintain a complete log of active and inactive projects.
 - 1. Expand log (database or other method) to include project-tracking information.
- B. Compile and consolidate procedures developed by the WNYLC Conservation Committee and others.
 - 1. maintain in project office.
 - 2. Compile and distribute WNYLC standards and practices
- C. Develop and maintain Baseline Documentation Reports for all holdings
- D. Create management plans for all conservation fee holdings and certain easement holding
- E. Complete property monitoring field work and reports for all holdings by 12/15 of each year. **COMBINE WITH F**
- F. File and distribute monitoring reports to landowners and municipal project representatives by 12/31 of each year.
- G. To review WNYLC procedures for compliance with LTA Standards and Practices

Objective 4: To continue working with communities and developers willing to explore and implement conservation and open space development strategies.

Action Steps:

- A. Add community leaders and conservation friendly developers to mailing lists
- B. Utilize Speakers Bureau, educational presentations and media outlets to spread the message of the organization, particularly in communities without an active Western New York Land Conservancy presence

Addendum

Membership Plan

Development Plan

Conservation Plan

^oThis material is designed to provide accurate, authoritative information in regard to the subject matter covered. It is provided with the understanding that the Land Trust Alliance is not engaged in rendering legal, accounting, or other professional counsel. If legal advice or other expert assistance is required, the services of competent professionals should be sought.