



Strategic Plan

July 2011 –June 2014

Adopted June 30, 2011

Introduction

As Piedmont Land Conservancy approaches its 22nd anniversary in 2012, we celebrate many significant accomplishments, including accreditation by the Land Trust Alliance, appropriate funding of our stewardship endowment, the protection of nearly 19,000 acres and, most recently, operating with a balanced budget. We have 1,200 members, a 17-member board and a footprint that reaches across nine counties. Importantly, we remain tightly focused on our mission to protect natural and scenic lands, farms, and open space in piedmont North Carolina to enrich the quality of life for our communities and for future generations. Our success and growth have been fueled by our excellent professional staff, generous benefactors, landowners and volunteers, good governance by our board, sound financial management, and readily available project funding in the form of state and federal programs and incentives.

But as we have seen in the recent financial crisis, the related retraction in government support for our work and the increased emphasis on reducing the national debt, the world of land conservation is experiencing profound and likely permanent change. Our traditional methods of funding projects such as federal and state tax incentives and the N.C. Clean Water Management Trust Fund, as well as the investment vehicles we have used to build our cash reserves, are under pressure. To ensure that our mission continues in perpetuity, Piedmont Land Conservancy must chart a new course through a strategic plan aimed at achieving sustainability for the long term.

Achieving long-term sustainability requires a strengthened commitment to developing our leadership, our staff and our board. It means that we must significantly expand our fundraising, maintain our fiscal vigilance, and cultivate deeper relationships in the communities we serve. It requires us to continue our stewardship of lands under protection and carefully add new lands to our portfolio.

Each of our core committees—Land and Resource, Development, Finance, Board and Staff, and Public Relations—have examined their respective areas of responsibility and considered how their work can best support our objective of long term sustainability. Their specific recommendations are outlined below. Together, their recommendations form an interlocking strategic plan to guide our path.

Land and Resource Committee

The Land and Resource Committee oversees PLC's land conservation activities, reviews and recommends all projects for Board approval, and assists with stewardship issues as needed.

Goals and Objectives

- Refocus land protection activities in the face of changing state funding and easement incentives to continue protecting the Piedmont's special places.
- Ensure that PLC's land protection projects create the greatest conservation impact.

Objectives over the next three years will include the following:

Donated Conservation Easements

- Focus staff energy and effort on donated conservation easements.
- Explore ways to minimize transactional costs to donating landowners
 - Stewardship Endowment "scholarships"
 - Identify grant sources to assist with appraisals, surveys, Phase I's, etc.
- Proactively seek donated easements.
- Educate influencers about donated conservation easements – i.e. attorneys, CPAs, forestry consultants, Soil & Water Boards, etc.

Purchased Conservation Easements

- Focus on critical properties to maximize impact.
- Account for total expenses on farmland easements.
- Reduce landowners looking for purchased conservation easements.

Land Acquisitions

- Explore non-traditional methods of acquiring important lands – i.e. bank foreclosures, land swaps, etc.
- Maximize capacity for land acquisition by increasing Land Protection Revolving Fund

Stewardship

- Maintain highest standards for stewardship practices.
- Where feasible, increase land management activity for the benefit of conservation values protected.
- Recommend to Board of Directors which properties PLC should continue to own indefinitely, which it should sell and what the ultimate disposition of all owned properties should be.

Development Committee

The Development Committee oversees PLC's fundraising and cultivation efforts to ensure sufficient, diverse and dependable revenue to provide for achievement of the organization's goals.

Goals and Objectives

- Increase unrestricted contributions to allow for the desired growth of the organization.
- Identify and secure restricted contributions to support the activities of PLC's committees.

Objectives over the next three years include the following:

Membership Contributions

- Provide for increased contributions:
FY2012 - \$275,000; FY2013 - \$300,000; FY2014 - \$325,000
- Grow membership to support the desired increases in contributions with goal of 1,400 active members by June of 2014.
- Plan, oversee and evaluate Year End Appeals to support desired increases in contributions. This strategy should include individual solicitations for support matched to donor interest and project intent.
- Maintain focus on individual donors. Pursue and commit to a comprehensive cultivation effort of personal visits/site visits/ personal communication, mail and e-mail efforts that are designed to deepen donor interests in PLC.
- Continue efforts to attract corporate partnerships and sponsorships.
- Evaluate non-traditional membership opportunities such as school kids, lifetime memberships, etc.

Event Management

- Plan, assist with the execution of and evaluate fundraising events consistent with the organization's mission and goals.
- Personally invite individuals to events and accompany where feasible.
- Seek out unique, property-centric event settings.
- Evaluate events based on dollars raised and friends committed, with an eye toward eliminating events that do not prove worthy.

Planned Giving

- Invite every active PLC member to join the *Forever These Lands Society*
- Grow the number of identified planned giving donors.
- Maintain and strengthen an annual *Forever These Lands Society* reception
- Seek to match individual donors with long term needs of the organization, i.e. botanical interests to Emily Allen's Garden or geographical interests to appropriate projects

Programmatic Fundraising

Monitor the ongoing efforts of all PLC committees and pursue funding necessary to meet their respective goals; example: seek sources of funding to lessen transactional costs for donated easements

Finance Committee

The Finance Committee oversees PLC's financial condition, plans for and oversees funding of projects as well as daily operations, and allocates and manages PLC's assets to achieve the organization's goals.

Goals and Objectives

- Work to assure PLC's continuing financial strength
- Manage PLC financial assets consistent with its mission

Objectives over the next three years include the following:

Cash Flow Management

- Build and maintain a 3-6 month operating reserve, in accordance with guidelines for nonprofits.
- Develop annual operating budgets, and oversee expenditures consistent with those budgets, to make most efficient use of the organization's resources.

Allocation of Assets

- Sell land holdings which do not have significant conservation value and invest proceeds as provided below under Investment Management.
- Develop a mechanism to prioritize properties appropriate for sale.
- Oversee sale of properties as recommended by Land and Resource Committee and approved by the Board of Directors and manage proceeds per donor agreements, grant restrictions and the direction of the Board of Directors.

Investment Management

- Monitor and evaluate investments at community foundations.
- Develop and implement a strategy for investing funds including the Land Protection Revolving Fund and proceeds from the sale of land, consistent with our investment policy.
- Develop an appropriate long-term investment vehicle for Mitchell River and other dedicated funds such as Land Protection Revolving Fund, restricted gifts and bequests.

Auditing and Reporting

- Effectively manage the annual audit process.

- Establish a consistent, appropriate system to keep all Board members advised of PLC's key financial indicators.

Board and Staff Committee

The Board and Staff Committee evaluates PLC's Board of Directors, seeks out and recommends new Board members and advises the Executive Director on staffing related issues.

Goals and Objectives

- Foster a Board of Directors with sufficient expertise and passion to fulfill the mission of the organization.
- Increase involvement of board members in fundraising.
- Take necessary actions to attract and retain a highly competent and motivated staff to fulfill the mission of the organization.

Objectives over the next three years include the following:

Board of Directors

- Survey current and former Board members for feedback to strengthen commitment and engagement.
- Develop stronger orientation process to set expectations for incoming Board members.
- Clarify expectations of Board members to encourage more engagement and recognition of fundraising responsibilities.
- Seek greater diversity of the Board across multiple variables such as age, race, geographical region, professional status, etc.
- Evaluate the need for a Board retreat or other team-building effort.
- Implement steps to enhance communication with past Board members to ensure their continued commitment and support.

Establish Honorary Board

- Comprised of major donors, community leaders, stakeholders and others PLC wishes to recognize and who could enhance the image of PLC.
- Establish guidelines and selection criteria.
- Recruit, recognize and publicize.
- Consider annual luncheon or other function.

Committees

- Broaden and clarify Executive Committee's responsibilities for Executive Director's review and compensation.
- Review and modify responsibilities of each committee.
- Where appropriate seek increased Board involvement on key committees.
- Recruit strong committee members with needed expertise.

- Development Committee
 - Evaluate splitting Committee to encourage greater effectiveness in local communities.
 - Expand Board and non-Board Development Committee membership.
 - Evaluate advantages of establishing a separate Membership Committee to focus on areas such as grassroots membership growth, youth cultivation and volunteer development.

Staff

- Commit to providing all staff members compensation and benefits comparable to NC’s land trusts and other non-profit organizations.
- Review and update PLC’s Employee Policy Manual.
- Annually evaluate staffing levels and adjust according to project workload, budgetary constraints and other relevant factors.

Bylaws

- Review Bylaws and provide any recommended changes or updates to the Board for approval.

Public Relations Committee

The Public Relations Committee oversees PLC’s public relations efforts to ensure the organization’s mission is properly communicated to the public.

Goals and Objectives

- Increase PLC’s exposure within the community to a broader, more diverse audience.
- Evolve PR efforts to keep pace with current technologies.

Objectives over the next three years include the following:

Maintain and Improve Current Communication Tools

- Continue to improve *LandLines* member communications newsletter.
- Measure and evaluate effectiveness, timing and presentation of *LandLines*.
- Maintain and update piedmontland.org with up-to-date information.
- Maximize effectiveness of monthly email updates.

Create, Grow and Improve Social Media Presence

- Develop strategic Facebook presence.
- Determine need and relevance of other social networking sites.
- Identify social media expert to join PR Committee.

- Provide appropriate training for staff and volunteers on social media outreach.

Make PLC's Message More Meaningful to More People

- Explore ways of reaching new audiences (i.e. The Business Journal)
- Revise PLC's message to focus on personal impacts.
- Partner with other groups to extend PLC's reach (i.e. Triad Moms on Main)
- Review and if needed, revise, existing policy for use of PLC's logo by supporters.
- Explore opportunities to encourage use of PLC's logo by supporters.

Expand Event-Based PR for Greatest Impact

- LandJam
- Egg Hunt
- Hikes and Outings