

# Shirley Heinze Land Trust

## 2020 – 2023 Strategic Plan



# Strategic Plan Definitions

**Mission:** A concise description of what we do and why we do it

**Vision:** Our picture of what success will look like

**Core Values:** The principles that guide our internal conduct and our relationships with others

**Strategies:** A coherent set of tactics designed to achieve a specific goal or goals

**Tactics:** A set of actions designed to advance a strategy

**Performance Measure:** A numerical measure of the impact of a tactic or strategy

**Committee Workplan:** The set of action steps, resources, responsibilities, and timeline to achieve tactics

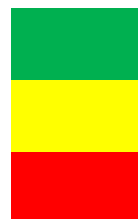
**Action Steps:** The specific activities needed to advance a tactic

**Resources Needed/secured:** The money, staff, board resources required to advance the tactic

**Point person:** The person responsible for making sure the action step happens

**Time frame:** Critical milestones for advancing the tactic

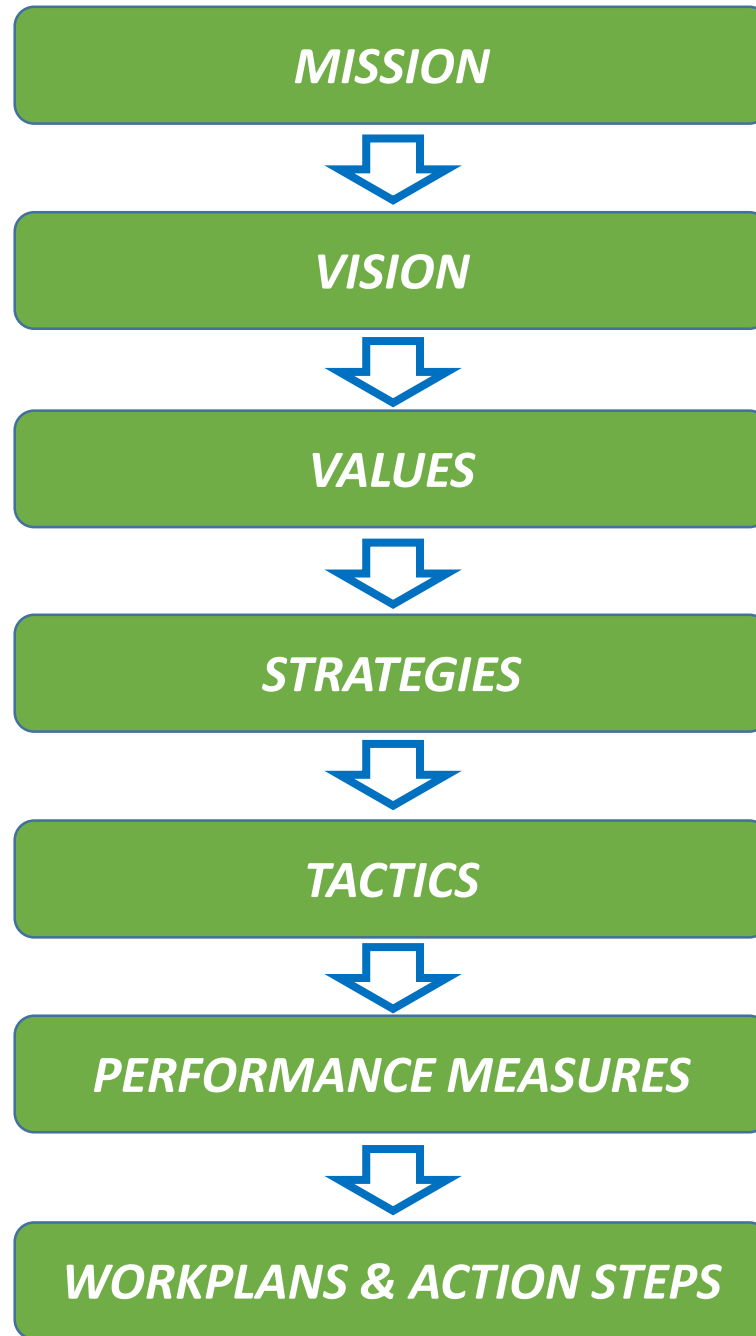
**Progress Card Colors:**



On schedule and budget with quality, no need for discussion

Potential issues with schedule, budget or quality, needs attention

Serious issues with schedule, budget and/or quality, needs immediate attention



# Mission

## New Mission

- *To preserve and restore natural lands and waters in northwestern Indiana, and to engage people in nature and conservation.*

**Strategic Plan Vision:** To connect individuals and communities to nature and build understanding and support for conservation

# Values

**Conservation:** We are committed to preserving nature for the benefit of future generations.

**Collaboration:** We are most effective when we work with other groups and individuals to accomplish shared goals.

**Integrity:** We build trust by being honest, straightforward and reliable in all our relationships.

**Inclusiveness:** We respect the needs, values and traditions of our communities and actively seek to engage them in our work.

**Innovation:** We try new approaches and test new ideas to achieve big goals.

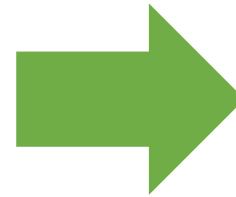
# Strategies

Enhance the impact of our conservation areas

Engage partners to foster and advance conservation goals

Create programming that connects people with nature

Build SHLT's capacity



Organizational Growth  
(2016-2019 Plan)

+

Engagement/Outreach  
(Next Level Plan)

# Enhance the impact of our conservation areas

- Acquire land to expand and connect priority conservation areas
- Improve public access, amenities in priority sites, particularly Meadowbrook and Lydick
- Steward properties to achieve conservation and programmatic goals
- Define and develop a plan for the Kankakee River conservation area



# Engage partners to foster and advance conservation goals

- Work with community, youth, business, and religious organizations to bring people to our properties and build support for conservation
- Work with other regional organizations to advance conservation goals and provide conservation expertise and leadership in the communities we serve
- Work with urban communities to engage and build partnerships
- Work with the agricultural community to explore conservation options

# Create programming that connects people with nature

- Develop programming that will make Meadowbrook and Lydick conservation destinations for children and adults
- Create community-based programming at other select properties
- Engage volunteers in stewardship, outreach, fundraising and community building

# Build SHLT's capacity

- Assess and pilot new conservation tools (e.g., ag protection, wetland mitigation, water quality, conservation easements, climate, alt energy)
- Increase SHLT's financial strength
  - Major Gifts – Capital Projects
  - Endowment Growth (Fund the Future Campaign)
  - Legacy Commitments
  - Reoccurring Donors (appeal/on-line/monthly)
  - Campaign Plan
- Build Brand Recognition
- Build staff skills, knowledge, and experience
- Build relationships with emerging leaders in the region
- Re-Accreditation

**Strategic Plan Vision:** To connect individuals and communities to nature and build understanding and support for conservation

# Strategic Plan Goals for 2023

- 1) Implement Lydick and Meadowbrook Master Plans to be conservation destinations
- 2) Define and implement a rural/ag conservation strategy
- 3) Integrate water conservation and climate change tools
- 4) Develop programming and outreach to engage more people in rural and urban communities
- 5) Be recognized as a community-centered land trust

# SHLT STRATEGIC PLAN, 2020-2023

## MISSION

To preserve and restore natural lands and waters in northwestern Indiana, and to engage people in nature and conservation

## VISION

To connect individuals and communities to nature and build understanding and support for conservation

## VALUES

Conservation ~ Collaboration ~ Integrity ~ Inclusiveness ~ Innovation

## STRATEGIES

### Enhance the impact of our conservation areas by:

- Acquiring land to expand and connect priority conservation areas
- Improving public access, amenities in priority sites, particularly Meadowbrook and Lydick
- Stewarding properties to achieve conservation and programmatic goals
- Defining and developing a Kankakee River conservation area plan

## MEASURES OF PROGRESS:

- # of acres acquired in priority areas
- % completion of master plans
- % of acres where conservation targets are being achieved
- create plan, % of plan implemented

### Engage partners to foster and advance conservation goals by working with:

- Community, youth, business, and religious organizations to bring people to our properties and build support for conservation
- Other regional organizations to advance conservation goals and provide conservation expertise and leadership in the communities we serve
- Urban communities to engage and build partnerships
- The agricultural community to explore conservation options

- # of new people and entities engaged
- implementation and refinement of partnership prioritization work
- # of new communities and residents engaged
- # of outcomes achieved in the Crown project

### Create programming that connects people with nature by:

- Developing programming that will make Meadowbrook and Lydick conservation destinations for children and adults
- Creating community-based programming at other select properties
- Engaging volunteers in stewardship, outreach, fundraising and community building

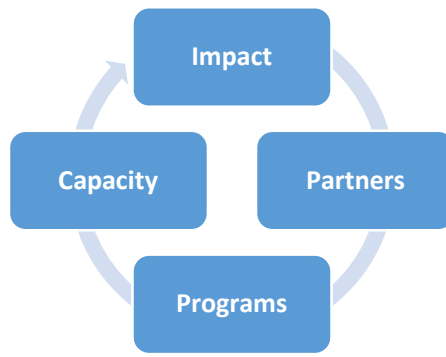
- implementation of new programs, % of increased engagement
- deliver new programming to sites selected
- increased # of volunteers in program areas

### Build SHLT's capacity by:

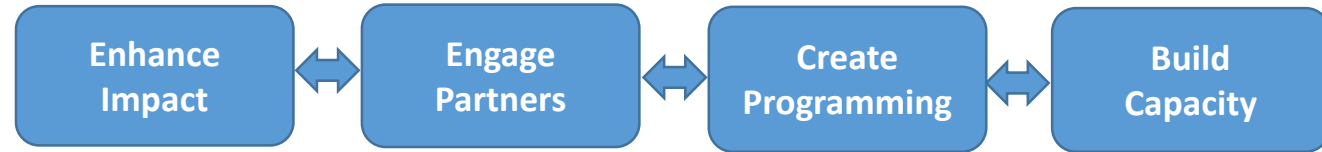
- Assessing and piloting new conservation tools
- Increasing SHLT's financial strength through targeted fundraising
- Building staff skills, knowledge, and experience
- Building brand recognition
- Build relationships with emerging leaders in the region
- Completing LTA re-accreditation
- Building capacity for measuring our progress

- Use new ag, wetland mitigation, water quality, CE's, climate, alt energy tools
- % of annual fundraising goals achieved
- % of staff completing their development plans
- % increase in awareness of SHLT on a regional survey
- # of emerging leaders engaged
- Re-accreditation in 2022
- Use of new measures to manage the organization

**Goals for 2023:** Implement Lydick and Meadowbrook Plans to be conservation destinations ~ Develop programming and outreach to engage more people in rural and urban communities ~ Integrate water conservation and climate change tools ~ Define and implement a rural/ag conservation strategy ~ Be recognized as a community-centered land trust



# Alignment: Committee Structure & Expectations



- Executive
- Finance
- Fundraising
- Board Development
- Programs  
Education and Stewardship
- Land
- Marketing & Communications

	Enhance Impact	Engage Partners	Create Programming	Build Capacity
Executive	X	X		X
Finance				X
Fundraising				X
Board Development		X		X
Programs <small>Education and Stewardship</small>		X	X	
Land	X	X		
Marketing & Communications		X		X

**STRATEGY: Enhance the impact of our conservation areas**

Tactics	Performance Measure	Action Step (developed by staff and/or committees to advance tactic)	Resources Needed/Secured (what is lacking or in place)	Point Person (staff or board lead)	Timeframe (date to date)	Status (G, Y, or R)
Acquire land to expand and connect priority conservation areas	# of acres acquired in priority areas					
Steward properties to achieve conservation and programmatic goals	% of acres where conservation targets are being achieved					
Define and develop plan for Kankakee River Conservation Area	create plan, % of plan implemented					

**STRATEGY: Engage partners to foster and advance conservation goals**

Work with the ag community to explore conservation options	# of outcomes achieved in the Crown project					
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**STRATEGY: Build SHLT's capacity**

Assess and pilot new conservation tools (e.g., ag protection, wetland mitigation, water quality, conservation easements, climate, alt energy)	established ag program, active in-lieu fee site, defined measures in place for water quality, % of management plans with climate strategies, % of strategies being implemented					
Re-Accreditation	# of updated policies					



**STRATEGY: Engage partners to foster and advance conservation goals**

Tactics	Performance Measure	Action Step	Resources Needed/Secured	Point Person	Timeframe	Status
		(developed by staff and/or committees to advance tactic)	(what is lacking or in place)	(staff or board lead)	(date to date)	(G, Y, or R)
Work with community, youth, business, and religious organizations to bring people to our properties and build support for conservation	# of new people and entities engaged					
Work with urban communities to engage and build partnerships	# of new communities and residents engaged					

**STRATEGY: Create programming that connects people with nature**

Develop programming that will make Meadowbrook and Lydick conservation destinations for children and adults	implementation of new programs, % of increased engagement					
Create community-based programming at other select properties	deliver new programming to sites selected					

Fundraising Committee - 2020 Annual Workplan

**STRATEGY: Build SHLT's capacity**

Tactics	Performance Measure	Action Step (developed by staff and/or committees to advance tactic)	Resources Needed/Secured (what is lacking or in place)	Point Person (staff or board lead)	Timeframe (date to date)	Status (G, Y, or R)
Major Gifts - Capital Projects	% of financial goal achieved					
Quasi-Endowment Growth (Fund the Future Campaign)	Double					
Legacy Commitments	75					
Reoccurring Donors (appeal/on-line/monthly)	% retention					
Campaign Plan	complete feasibility study and timeline					
Re-Accreditation	# of updated policies					

# Finance Committee - 2020 Annual Workplan

**STRATEGY: Build SHLT's capacity**

Tactics	Performance Measure	Action Step	Resources Needed/Secured	Point Person	Timeframe	Status
		(developed by staff and/or committees to advance tactic)	(what is lacking or in place)	(staff or board lead)	(date to date)	(G, Y, or R)
Major Gifts - Capital Projects	% of financial goal achieved					
Quasi-Endowment Growth (Fund the Future Campaign)	Double					
Re-Accreditation	# of updated policies					

Marketing Committee - 2020 Annual Workplan

**STRATEGY: Engage partners to foster and advance conservation goals**

Tactics	Performance Measure	Action Step	Resources Needed/Secured	Point Person	Timeframe	Status
		(developed by staff and/or committees to advance tactic)	(what is lacking or in place)	(staff or board lead)	(date to date)	(G, Y, or R)
Work with other regional organizations to advance conservation goals and provide conservation expertise and leadership in the communities we serve	implementation and refinement of partnership prioritization work					

**STRATEGY: Build SHLT's capacity**

Build brand recognition	% completion of plan, % increase in awareness					
Build relationships with emerging leaders in the region	# of engaged leaders					
Re-Accreditation	# of updated policies					

Board Development Committee - 2020 Annual Workplan

**STRATEGY: Engage partners to foster and advance conservation goals**

Tactics	Performance Measure	Action Step	Resources Needed/Secured	Point Person	Timeframe	Status
		(developed by staff and/or committees to advance tactic)	(what is lacking or in place)	(staff or board lead)	(date to date)	(G, Y, or R)
Work with urban communities to engage and build partnerships	# of new communities and residents engaged					

**STRATEGY: Build SHLT's capacity**

Build relationships with emerging leaders in the region	# of engaged leaders					
Re-Accreditation	# of updated policies					

**STRATEGY: Enhance the impact of our conservation areas**

Tactics	Performance Measure	Action Step	Resources Needed/Secured	Point Person	Timeframe	Status
		(developed by staff and/or committees to advance tactic)	(what is lacking or in place)	(staff or board lead)	(date to date)	(G, Y, or R)
Define and develop plan for Kankakee River conservation area	create plan, % of plan implemented					

**STRATEGY: Engage partners to foster and advance conservation goals**

Work with other regional organizations to advance conservation goals and provide conservation expertise and leadership in the communities we serve	implementation and refinement of partnership prioritization work					
Work with urban communities to engage and build partnerships	# of new communities and residents engaged					
Work with the ag community to explore conservation options	# of outcomes achieved in the Crown project					

**STRATEGY: Build SHLT's capacity**

Assess and pilot new conservation tools (e.g., ag protection, wetland mitigation, water quality, conservation easements, climate, alt energy)	established ag program, active in-lieu fee site, defined measures in place for water quality, % of					
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**BOARD SCORECARD**

Strategies	Performance Measures	Lead	Status (G, Y, or R)	Comments
<b>Enhance the impact of our conservation areas</b>				
Acquire land to expand and connect priority conservation areas	# of acres acquired in priority areas	Land Strategy		
Improve public access, amenities in priority sites, particularly Meadowbrook and Lydick	% completion of master plans	Meadowbrook Ad-hoc/SJC Adv.		
Steward properties to achieve conservation and programmatic goals	% of acres where conservation targets are being achieved	Land Strategy		
Define and develop plan for Kankakee River conservation area	create plan, % of plan implemented	Land Strategy/Executive		
<b>Engage partners to foster and advance conservation goals</b>				
Work with community, youth, business, and religious organizations to bring people to our properties and build support for conservation	# of new people and entities engaged	Programs		
Work with other regional organizations to advance conservation goals and provide conservation expertise and leadership in the communities we serve	implementation and refinement of partnership prioritization work	Marketing/Executive		
Work with urban communities to engage and build partnerships	# of new communities and residents engaged	Programs/Board Dev./Ex		
Work with the agricultural community to explore conservation options	# of outcomes achieved in the Crown project	Land Strategy/Ex/New Advisory		
<b>Create programming that connects people with nature</b>				
Develop programming that will make Meadowbrook and Lydick conservation destinations for children and adults	implementation of new programs, % of increased engagement	Programs		
Create community-based programming at other select properties	deliver new programming to sites selected	Programs		
Engage volunteers in stewardship, outreach, fundraising and community building	increased # of volunteers in program areas	Programs		
<b>Build SHLT's capacity</b>				
Assess and pilot new conservation tools (e.g., ag protection, wetland mitigation, water quality, conservation easements, climate, alt energy)	established ag program, active in-lieu fee site, defined measures in place for water quality, % of management plans with climate strategies, % of strategies being implemented	Land/Executive		
<b>Increase SHLT's financial strength</b>				
Major Gifts – Capital Projects	% of financial goal achieved	Fundraising/Finance		
Quasi-Endowment Growth (Fund the Future Campaign)	Double	Fundraising/Finance		
Legacy Commitments	75	Fundraising		
Reoccurring Donors (appeal/on-line/monthly)	% retention	Fundraising		
Campaign Plan	complete feasibility study and timeline	Fundraising		
Build staff skills, knowledge, and experience	% completion of development plans	Executive		
Build brand recognition	% completion of plan, % increase in awareness	Marketing		

# Annual Operating Cycle

**January** – Board Retreat to highlight accomplishments, review performance measure progress, discuss committee workplans for upcoming year, and update plan if necessary

**February** – Committees work toward achieving action steps in workplans

**March** – Committees work toward achieving action steps in workplans

**April** – Committees work toward achieving action steps in workplans

**May** – Scorecard included in the board mailing and progress update presented to the board

**June** – Committees work toward achieving action steps in workplans

**July** – Committees work toward achieving action steps in workplans

**August** – Committees work toward achieving action steps in workplans

**September** – Scorecard included in the board mailing and progress update presented to the board

**October** - Committees assess progress toward achieving action steps in workplans and begin drafting new workplan

**November** – Committees work toward achieving action steps in workplans

**December** – Executive Committee reviews new workplans and aligns with the plan



## Four-Year Strategic Planning Cycle

**2020-2022** – Three board meeting updates provided by committee chairs and a Board annual review of the strategic plan will be used to make adjustments as needed (Executive Committee)

**2023** – Executive Committee initiates strategic planning process, draft strategies and goals are established by ad hoc Strategic Planning Committee

**2024** – A new strategic plan is adopted by the Board