

GOAL-TRACKING SPREADSHEET

UPPER SACO VALLEY LAND TRUST - STRATEGIC ORGANIZATIONAL PLAN - 2017 REVISION

version 5/1/17

↓ STRATEGIC PRIORITY CATEGORY

↓ INDICATORS OF SUCCESS / ACTION ITEMS	SOURCE*	RESPONSIBLE PARTY	2016 STATUS	2019 updateTIMELINE / GROWTH METRICS.....					COMMENTS on TIMELINE / GROWTH METRICS*
				...within 3 years...	3 year status, closed projects	3 yrs, inclusive of options signed	...within 5 years...	...within 10 years...	
1. SAVING LAND									
Conservation Impact									
<p>Concern: We are located in an area of NH/ME with very high natural resource values, rapidly increasing population, and high rates of conversion</p> <p>Goal: Continue on our successful path of conserving lands with high natural resource values</p>									
# USVLT projects (fee or CE)	de facto (core mission); 2011 SOP Goal 7	Staff/ Land Comm	56	67	68 (actual transactions)	72	75	95	Metric is based on past pace of land projects, and is equivalent to 4 high-quality projects/ year. It's assumed that this will be a mix of donated & purchased interests. We will not come close to "saturation" within 10 years, but might see some slowing down of projects.
# partnership projects (we are not the lead org and take neither a fee interest nor a CE)	de facto (core mission); 2011 SOP Goal 7	Staff/ Land Comm	2	2	2	3	3	5	These are projects where, while we have helped in fundraising, we neither own the fee interest nor have a conservation easement interest. Metric shows low growth, as there's consensus that we should not actively seek out these projects, unless they are excellent, regionally significant projects where another organization takes the lead and comes to us for assistance.
# acres, total	de facto (core mission); 2011 SOP Goal 7	Staff/ Land Comm	11,013	13,800	11,832	13,510	15,600	20,000	This metric is based on the number of total projects accomplished, and it is equivalent to each project averaging 200 acres (slightly larger average than current average).
# miles of river (and tributary) frontage	increased focus on water resources - see Section 6	Staff/ Land Comm	13.2	15.5	14.4	16.4	17.0	20.0	This metric shows ambitious growth, but a few families could add significantly to this (Walker family in Fryeburg, etc.); should also caution that there are not many such large tracts left.
of total acres protected, % wetland	increased focus on water resources - see Section 6	Staff/ Land Comm	4.72%	5.00%	5.66%	5.37%	6.00%	7.00%	This metric measures only "open" wetlands (not forested, or floodplain forested, etc.); 2026 goal would be equivalent to 1,400 acres of wetland - or 270% of current acreage (520); this would be 10% of all acquisitions targeted for 2026.
of total acres protected, % farmland	increased focus on ag resources - see Section 6	Staff/ Land Comm	6.52%	9.00%	6.20%	5.93%	11.00%	15.00%	This metric measures "currently farmed" lands (as opposed to prime farmland soils); 2026 goal would be equivalent to 3,700 acres - or 515% of current acreage (718); this would be 33% of all new acquisitions targeted for 2026.
Community Conservation									
<p>Concern: We need to continue to be perceived as a relevant organization in the towns we serve by addressing community needs in our conservation work</p> <p>Goal: Continue on our successful path of spearheading community-oriented projects (even if small in acreage, e.g.)</p>									
# projects with high community impact, typically not donated	Relevant to the Community Conservation work in Maine from 2014 - 2016 (Doug, Mona, William)	Staff/ Land Comm	13	15	19	22	16	18	Deciding what is a "community conservation" project is somewhat arbitrary, but the property either has to be open to public, have historical significance, a beloved view, etc.. These are the projects that communities will readily rally around -- and the majority of these projects are likely to be purchased interests. There is general consensus that we need to keep up our current track record of fundraising for community projects in order to engage communities & grow membership -- but also need to note that there are capacity issues involved with fundraising campaigns for purchased interests. Assumption behind metric: average of 1 project every other year.
Conduct community listening sessions	Community Conservation work; AYO transactional priority #2	Staff/ All BOD	last conducted in 2013	X	goal met!	n/a	X	X	Need to continue to interface with service area communities to know which projects are of importance to them, and also to reach out to area neighbors of USVLT-fee-owned land for their input on management plans. This work is important, and timeline shows continued commitment. See also "effective partnerships" in Section 5, below.
Capture key landowner relationships in database	November 2016 retreat	Staff/ Land Comm	not started	X	Goal NOT met	n/a	X		The new DPO database is set up to keep track of which large landowners within our service area with "target properties" have been approached, when, and by whom. We can also develop a list of "community conservation" variables (trails, views, public access, etc.). Timescale shows nearterm work to identify these landowners.
Maintain high-quality relationships with key landowners/ families	November 2016 retreat	Staff/ Land Comm	not started		Goal NOT met	n/a	X	X	NOTE: this is about maintaining relationships with landowners/ landowner families with whom we have not yet done a project, or who have large tracts that are not yet conserved (as distinct from existing CE landowner - addressed under Stewardship, below). This is a natural follow up from the former indicator. Timescale shows mid-term and long-term work to maintain these landowner relationships.
Celebrating land projects/ special achievements	November 2016 retreat	Staff/ All BOD	not started	X	X	X	X	X	Celebrating our achievements will help identify which projects are, truly, community conservation projects (as well as helping to get the word out about other less community-oriented goals). Timescale shows nearterm focus and continued commitment.

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Strategic Conservation Planning - Update									
Concern: We need to align our limited resources with projects that have the highest conservation value									
Goal: Refine our Strategic Conservation Plan and use the Plan to actively seek out and/or steer new projects									
Subgoal: conservation of strategic lands - how well is the strategy working? (Note: these stats assume that we're measuring against 2012 strategic focus areas, not revised focus areas that may be developed with addl data)									
# acres of conservation land within high-ranking priority focus areas (USVLT <u>and</u> other orgs/ State/ Fed)	2013 retreat objective	Staff/ Land Comm	8142	9058	8248	8248	10077	11211	"High-ranking" focus areas are those with a weighted average RDM* score of 34 to 44. There has been 25% growth in protected lands within high-ranking focus areas since 2009 (from 6482 acres to 8142 acres); future metrics are based on past performance and adjusted slightly upward to 3.75%/year (acknowledging that we need to be more proactive in seeking out projects within focus areas).
% of high-ranking focus areas conserved			23.1%	25.7%	23.4%	23.4%	28.6%	31.8%	FYI, up from 18.4% in 2009; future metrics are based on acreage counts above.
# acres of conservation land within mid-ranking priority focus areas (USVLT <u>and</u> other orgs/ State/ Fed)	2013 retreat objective	Staff/ Land Comm	10648	11686	10979	11024	12826	14076	"Mid-ranking" focus areas are those with a weighted average RDM* score of 28 to 33. There has been 20% growth in protected lands within mid-ranking focus areas since 2009 (from 8893 acres to 10648 acres); future metrics are based on past performance and adjusted slightly upward to 3.25%/year (acknowledging that we need to be more proactive in seeking out projects within focus areas).
% of mid-ranking focus areas conserved			27.1%	29.7%	27.9%	28.1%	32.6%	35.8%	FYI, up from 23.6% in 2009; future metrics are based on acreage counts above.
# acres of conservation land within low-ranking priority focus areas (USVLT <u>and</u> other orgs/ State/ Fed)	2013 retreat objective	Staff/ Land Comm	4877	5170	7449	9104	5480	5809	"Low-ranking" focus areas are those with a weighted average RDM* score of 21 to 27. There has been 11% growth in protected lands within low-ranking focus areas since 2009 (from 4382 acres to 4877 acres); future metrics are based on past performance and adjusted upward to 2%/year (acknowledging that we need to be more proactive in seeking out projects within focus areas).
% of low-ranking focus areas conserved			10.8%	11.4%	16.5%	20.2%	12.1%	12.9%	FYI, up from 9.7% in 2009; future metrics are based on acreage counts above.
Subgoal: Incorporate wildlife corridors into our natural resource inventory work to refine focus areas									
Research other LT's work in this area	2013 retreat objective	Staff/ Land Comm	not started		n/a (later target)	n/a		X	This work is important, but capacity issues, coupled with the fact that our NRI is (only) 4 years old, necessitate delay.
Seek out grant funding specific to this expansion	2013 retreat objective	Staff/ Land Comm	not started		n/a (later target)	n/a		X	"
Hire consultant to update plan	2013 retreat objective	Staff/ Land Comm	not started		n/a (later target)	n/a		X	"
Subgoal: Incorporate threat analysis (i.e., how "developable" is the land in question? What areas are most susceptible to climate change impacts?) into our natural resource inventory work to help rank focus areas									
Research other LT's work in this area	2013 retreat objective	Staff/ Land Comm	not started		n/a (later target)	n/a	X		This work is important, but capacity issues, coupled with the fact that our NRI is (only) 4 years old, necessitate delay.
Seek out grant funding specific to this expansion	2013 retreat objective	Staff/ Land Comm	not started		n/a (later target)	n/a	X		"
Hire consultant to update plan	2013 retreat objective	Staff/ Land Comm	not started		n/a (later target)	n/a	X		"

2. STEWARDING LAND

Public Access Improvement

Concern: We own and/or manage property that is well suited for public access, but has not yet been developed for such access and/or is poorly signed

Goal: Create more public benefit by enhancing access to our properties

# properties with developed trailheads	Individual property management plans	Staff/ Land Comm	7	9	11	12	10	12	Extg: ATF, Hayes, Tin Mountain, Bear Paw, Foss, Old Pinkham Farm, Cranmore; Potential: LML, Simone, Burnell, Mt Surprise, new projects (such as the "community conservation" projects mentioned above).
# properties with developed parking areas	Individual property management plans	Staff/ Land Comm	7	9	10	11	10	12	Extg: ATF, Hayes, Tin Mountain, Bear Paw, Foss, Old Pinkham Farm, Cranmore; Potential: LML, Simone, Burnell, Mt Surprise, new projects (such as the "community conservation" projects mentioned above).
# properties with welcoming kiosks/ signage	Individual property management plans	Staff/ Land Comm	5	7	7	8	9	11	Extg: ATF, Hayes, Bear Paw, Foss, Old Pinkham Farm; Potential: LML, Simone, Burnell, Mt Surprise, new projects (such as the "community conservation" projects mentioned above).

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Funding for Preserve Development									
<p>Concern: Some of our fee-lands (or CEs with active management roles) do not have dedicated stewardship funds</p> <p>Goal: Ensure we have the financial resources necessary to steward our fee lands for the foreseeable future with the establishment of a dedicated quasi-endowment fund</p>									
Meet LTA-advised levels of funding for current fee properties	AYO transactional priority #1&3	Staff/ Stewardship Comm/ Devt Comm	Goal Met!	n/a	n/a	n/a			2016 balance is sufficient for LTA's purposes; Board-designated fund was started by allocated excess operating funds in 2015, with additions made in 2016
Conduct forestry activities as a way to start/ increase fund as necessary for new preserves	AYO transactional priority #1&3	Staff/ Stewardship Comm/ Devt Comm	no longer necessary		n/a	n/a		X	forestry activities only needed if fund is running a deficit and if operating surplus cannot cover any additional requirements - revisit in 2025.
Seek specific grants for funding fee-land stewardship	AYO transactional priority #1&3	Staff/ Stewardship Comm/ Devt Comm	no longer necessary		n/a	n/a		X	grants only needed if fund is running a deficit and if operating surplus cannot cover any additional requirements - revisit in 2025.
Relationship with Landowners of Easement Properties									
<p>Concern: LTs can be perceived as having a "policing" attitude in regards to stewardship responsibilities</p> <p>Goal: Continue to build trusting relationships with our landowners</p>									
Send two-way communications (monitoring notice, LO survey, follow-up letters, e.g.) 1x/yr	2011 SOP Objective 1.2; 2014 Retreat Objective	Staff	Goal Met!	X	goal met!	n/a	X	X	This is de-facto, already within scope of current work. Timelines shows that we need to continue our current efforts for the foreseeable future.
Need to increase landowner presence during monitoring visits; engage with landowners in asking questions about future uses; make monitoring form more well-rounded.	November 2016 Retreat	Staff	not started	X	partially met	n/a	X	X	Staff would be best positioned to arrange these monitoring visits with LO's; perhaps conduct every other year (in addition to volunteer monitor visits). Timeline shows new focus in the shortterm and into the foreseeable future.
Provide informational communications outside of monitoring requirements 1x/ yr	2011 SOP Objective 1.2; 2014 Retreat Objective	Staff	Goal partially met	X	partially met	n/a	X	X	We need to dedicate more resources to this; timeline shows such increased dedication for the foreseeable future.
Encourage LO to send info packets to neighbors/ friends	2014 retreat objective	Staff	Goal partially met	X	Goal NOT met	n/a	X	X	We need to dedicate more resources to this; timeline shows such increased dedication for the foreseeable future.
Invasive Species									
<p>Concern: Invasive species/ pests/ pathogens represent a "silent" threat to already conserved lands</p> <p>Goal: To build a strategic framework for the identification and eradication of invasive species, in partnership with landowners and other orgs</p>									
Tally up # LT easements & preserves where invasives are identified/ mapped	2011 SOP Action 1.3.4	Staff/ Stewardship Intership	not started	X?	Goal NOT met	n/a		X	Consensus that this is not high priority in 2016, but to reassess in 2025 (or as needed) -- but also see next item regarding volunteer monitors and stewardship interns.
Empower volunteer monitors to begin the data collection process	2011 SOP Action 1.3.1	Land Comm/ Staff/ Stewardship Intership	not started	X	Goal NOT met	n/a			A preliminary approach to the "invasive problem" is to train volunteer monitors (and the Stewardship Intern) to identify the most common & noxious of these plants, and then to have locations mapped using a collectivized data-collection system (e.g., iMap Invasives in Maine). This work could start as early as 2017, with those volunteer monitors that are skilled in plant ID.
Link invasive spp to "threat analysis" in revised NRI	2011 SOP Action 1.3.4; 2011 SOP Objective 7.3.b	Land Comm/ Staff/ Stewardship Intership	not started		n/a (later target)	n/a		X	Consensus that this is not high priority in 2016, but to reassess in 2025 (or as needed)
Begin strategizing plan for invasive eradication within specific, self-contained watersheds	2011 SOP Action 1.3.4	Staff/ Stewardship Intership	not started		n/a (later target)	n/a		X	Consensus that this is not high priority in 2016, but to reassess in 2025 (or as needed)
Volunteer Monitors									
<p>Concern: As our stewardship responsibilities grow, volunteer monitors need to represent USVLT interests and serve as ambassadors</p> <p>Goal: To further strengthen our volunteer monitoring program</p>									
Recruit new monitors and/or empower existing monitors to recruit/ train/ serve as ambassadors	2011 SOP Action 1.2.1; 2013 retreat objective	Staff/ Stewardship Comm	Goal Met!	5	5 (goal met)	n/a	8	20	Currently at 40 monitors; goal is one monitor per property, or 60 by 2026 (likely maximum amount). Therefore, numbers reported under growth metrics show probable necessary increases.
Empower volunteer monitors to serve the LT in other ways (volunteer at public events, act in a role that's more of a docent, eg.)	November 2016 Retreat	Staff (LPS/ Devt Assoc)	not started	X	partially met	n/a	X	X	Task could be completed by simply alerting this group of dedicated volunteers to other, outside-normal-scope opportunities. Can start ASAP, and timeline shows increased dedication and effort.
Expand our current "volunteer monitor training" session so that it can serve as a refresher for current monitors and/or educational forum with outside speakers	2011 SOP Action 1.3.1	Staff/ Stewardship Comm	not started		n/a (later target)	n/a	X		Need some time to plan appropriately, so this will likely be developed in 2018 or 2019; a monthly speaker series could take place of this, too
Consider implementing an end-of-season get together that will 1) recognize and celebrate volunteer monitors & 2) serve as a "lessons learned" forum	2011 SOP Objective 4.2	Staff/ Stewardship Comm	not started		n/a (later target)	n/a	X		Need some time to plan appropriately, so this will likely be developed in 2018 or 2019; a monthly speaker series could take place of this, too

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3. BOARD DEVELOPMENT									
Board Nominations Process & Committee Capacity									
<p>Concern: USVLT needs to bring in new volunteers (committee level or BOD level) for fresh perspectives, energy, and capacity</p> <p>Goal: Through the SACo group, recruit and sustain engagement with community members that bring skills/attributes that fit our current needs</p>									
Conduct skills-gap analysis 1x/yr	2013 retreat objective	SACo	Last completed in 2014-5	X	partially met		X	X	We have a good template from winter of 2014-2015; need to dedicate more resources to this, and the timeline shows such increased dedication for foreseeable future.
Recruit 4+ new committee members/ yr	...following from above objective	SACo	Goal partially met	X	partially met		X	X	We need to dedicate more resources to this, and the timeline shows such increased dedication for foreseeable future.
Recruit 2+ new Board members/ yr (or as needed to fill terms)	...following from above objective	SACo	Goal partially met	X	partially met		X	X	We need to dedicate more resources to this, and the timeline shows such increased dedication for foreseeable future.
Board Evaluation & Recognition									
<p>Concern: USVLT Board members need to feel supported, inspired & valued</p> <p>Goal: Promote and recognize contributions of Board and committee members</p>									
Systematically evaluate Board performance (as a whole) 1x / yr	2011 SOP Objective 6.1(c)	SACo	Goal partially met	X	partially met		X	X	We have a good template from winter of 2014-2015; need to dedicate more resources to this, and the timeline shows such increased dedication for foreseeable future.
Celebrate Board achievements at Board meetings! (intra-board communication)	November 2016 Retreat	All BOD	Goal not met	X	Goal NOT met		X	X	Develop appropriate and individualistic way of appreciating accomplishments; could be as simple as sharing achievements at BOD meetings. Timeline shows such increased dedication for foreseeable future.
Celebrate / recognize Board members' and volunteers' achievements	extrapolated from 2011 SOP Objective 6.1(d)	SACo	Goal partially met	X	Goal NOT met		X	X	We have had periodic "blurbs" about Board members in past newsletters, but may want to increase this type of recognition through social media and other outlets. Feedback to date on the importance of this sub-goal has been mixed.
Board Education									
<p>Concern: USVLT Board members need to feel educated on pertinent topics & supported and inspired to achieve educational goals</p> <p>Goal: Help develop skills of Board and Committee members through readily available learning opportunities; remove barriers to access</p>									
Have educational sessions at Board meetings 2x/yr	2013 retreat objective	SACo	Goal not met	X	partially met		X	X	Need to dedicate more resources to this; timeline shows increased focus for foreseeable future.
Ensure that each Board member has a chance to share educational experiences with the rest of the Board	November 2016 Retreat	SACo/ BOD President/ ED	Goal partially met	X	goal met!		X	X	Need to make sure that individual Board members are given the time within Board meetings to discuss items that they've recently learned and would like to share. Can achieve by simply leaving time in the agenda for such sharing. Timeline shows such increased dedication for foreseeable future.
Inpsire Board to attend at least 1 workshop/ conference/ webinar per yr	2011 SOP Objective 6.1(b)	SACo	Goal partially met	X	partially met		X	X	Satisfactory track record of success, but still need to dedicate some additional resources to this. Timeline shows increased focus for foreseeable future.
Governance Representation in Communities We Serve									
<p>Concern: USVLT needs input from diverse towns & constituencies/ "ears to the ground"</p> <p>Goal: Expand networks and feedback from communities we serve</p>									
Consider weighting lesser-served communities in Board recruitment work	ED concern	SACo	Goal not met	X	Goal NOT met		X	X	Current Board is drawn from fewer than half of the towns we serve. Timeline shows increased focus for foreseeable future.
Outreach to Towns' community leaders requesting recommendations for Board and committee placement	ED concern	SACo	Goal not met	X	Goal NOT met		X	X	Increasing representation on Board is primary goal, but, failing that, we need to explore other ways to bring in the voices of other communities. Explore the formation of an Advisory Committee, or encourage each current BOD to forge relationships with members of diff Cons Comms, e.g. Can easily link with Land Committee outreach, too (e.g., sharing results from our NRI). Timeline shows increased focus for foreseeable future.

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Intra-Board Communication & Resources									
<p>Concern: USVLT Board members need to have a "manual" within easy reach & know what's going on organizationally</p> <p>Goal: Continue to implement cross-committee communication; update Board Manual periodically and keep document alive & useful</p>									
Implement cross-committee intra-organtl communications strategy	2013 retreat objective	Exec Comm with feedback from entire BOD	Goal partially met	X	partially met		X	X	This has been a past issue between LC and DC; staff is uniquely positioned to alert whole Board about potential miscommunication or lack of communication. Need to dedicate more resources to this, and the timeline shows such increased dedication for foreseeable future.
Better "on-boarding" process - BOD pairings, e.g.	November 2016 Retreat	SACo	Goal not met	X	Goal NOT met		X	X	Need to make transition smoother for new Board members, above and beyond review of Board Binder. Assign new Board members with veteran Board members who can serve as a coach/ liaison, etc. Timeline shows such increased dedication for foreseeable future.
Annual review of Board Binder	2013 retreat objective; AYO organizational priority #1	Staff	Goal Met!	X	goal met!		X	X	New Board binder "online" as of 2015. Timeline shows sustained focus, as annual review will be necessary to update contact lists, revised policies, etc.
4. FINANCIAL PLANNING									
Capacity									
<p>Concern: USVLT needs the financial resources necessary to complete work well and address staff & committee capacity issues</p> <p>Goal: Assure a robust foundation for staff and operations</p>									
Convene meetings of the Finance Committee 4x/yr (or as needed)	de facto (Bylaw requirement)	Finance Comm/ Devt Comm	In process	X	goal met!		X	X	Need to dedicate more resources to this, and the timeline shows such increased dedication for foreseeable future.
Establish a 5-year financial plan (with input from the strat org plan)	2011 SOP objective 3.1; 2013 retreat objective; AYO organizational priority #2	Finance Comm/ Devt Comm	Goal not met	X	partially met		X	X	Need to dedicate more resources to this, and the timeline shows such increased dedication for foreseeable future.
Recruit addl members to the Finance Committee	...following from above objective	Finance Comm/ Devt Comm	In process	X	goal met!		X	X	Need to dedicate more resources to this, and the timeline shows such increased dedication for foreseeable future.
Plan for new staff positions to address capacity needs	...following from above objective / January 2016 retreat	Finance Comm/ Devt Comm	Goal not met	X	partially met		X	X	Need to dedicate more resources to this, and the timeline shows such increased dedication for foreseeable future.
Long-term Financial Health									
<p>Concern: USVLT needs the financial resources necessary to make good on promises</p> <p>Goal: Continue to build reserve funds/ endowments as necessary</p>									
Continue to allocate \$1500/ project for legal defense	LTA-required minimum contribution	Finance Comm/ Devt Comm	Goal Met!	X	goal met!		X	X	Timeline shows continued focus, as contributions will be needed on a per-project basis.
Continue to allocate at least \$3000/ project to stewardship endowment	LTA-recommended contribution	Finance Comm/ Devt Comm	Goal Met!	X	goal met!		X	X	Timeline shows continued focus, as contributions will be needed on a per-project basis.
Consider creation of operational endowment in the financial plan	2013 retreat objective; AYO organizational priority #2	Finance Comm/ Devt Comm	In process	X	Goal NOT met		X		Will be wrapped into capital campaign; see next row.
Consider a multi-faceted capital campaign to address long-term financial needs	January 2016 retreat focus/ goal	Finance Comm/ Devt Comm	In process	X	Goal NOT met		X		Initial meetings with contract staff/ fundraiser occurring in 2016; need to make sure timing is right for staff, Board, and our donors. Goal is to move on this topic in the next few years.
Board Buy-In									
<p>Concern: Fundraising needs to be considered a "full-board" activity to fully engage our board</p> <p>Goal: To share the responsibility of fundraising and financial goal-setting with the full board</p>									
100% of Board members contribute financially to USVLT	2013 retreat objective	Devt Comm/ Executive Comm	Goal partially met	X	goal met!		X	X	Institutional need in order to attract additional large grants/ funders. Timeline shows sustained focus.
100% of Board members are involved in some aspects of the "fundraising cycle"	2013 retreat objective	Devt Comm/ Executive Comm	Goal partially met	X	partially met		X	X	Rick Jenkinson and Susan Beane currently spearheading and refining this work. Timeline shows sustained focus.

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5. OUTREACH, PARTNERSHIPS & PUBLIC RELATIONS									
Effective Partnerships									
<p>Concern: "Going it alone" is not nearly as effective as partnering with other organizations already tackling similar/ same issues</p> <p>Goal: To amplify environmental/ stewardship work through effective partnerships</p>									
Conduct stakeholder mtngs refining conservation focus areas and/or refining conservation values	2011 SOP Objective 5.1; 2013 retreat objective	Outreach /Land Comm	Goal not met		n/a (later target)		X	X	Likely to occur as we update our NRI (see Section 1), but also useful outside of NRI parameters if we would like to conduct "community listening" sessions (e.g., similar to Maine's Midcoast Conservancy recent "listening" sessions in each town they serve). Timeline is tagged to NRI update process.
Recreational community outreach	2013 retreat objective; Heightened focus at November 2016 retreat	Devt Comm/ Outreach Comm/ Staff	Goal partially met	X	goal met!		X	X	Cross-listed goal; see below under Membership Growth
Convene roundtable discussions with other Land Trusts	2011 SOP Objective 5.2	Staff	Goal partially met	X	goal met!		X	X	already occurring sporadically (as hosted by NHLTC or MLTN) - timeline shows continued focus.
Conduct mtngs (w/ public &/or partner orgs) for input specific to fee-land mngmnt	AYO transactional priority #2	Outreach /Land Comm	Goal not met	X	goal met!		X		Pertinent to current fee-owned lands and future acquisitions; ED believes this is an immediate priority; timetable shows nearterm focus
USVLT Known in Media									
<p>Concern: We need to stay active/ current in the eyes of our supporters and other community members</p> <p>Goal: To continue to grow our media presence, with a target of attracting younger audiences</p>									
Bulk email platforms - at least 12x / yr	2011 SOP Action 1.3.5; 2013 retreat objective	Staff	Goal Met!	X	goal met!		X	X	Goal met due to increased focus in 2015 and 2016. Timeline shows sustained efforts / focus.
Website & Facebook - regular, recurring updates; Facebook posts at least 1x wk	2011 SOP Action 1.3.5; 2013 retreat objective	Staff	Goal Met!	X	goal met!		X	X	Goal met due to increased focus in 2015 and 2016. Timeline shows sustained efforts / focus.
Press releases - aim for 8 topical press releases /yr	2011 SOP Action 1.3.5; 2013 retreat objective	Staff	Goal Met!	X	goal met!		X	X	Goal met due to increased focus in 2015 and 2016. Timeline shows sustained efforts / focus.
Easement Exploration Series - aim for 8 series / yr on varied topics	2011 SOP Action 1.3.5; 2013 retreat objective	Staff	Goal Met!	X	goal met!		X	X	Goal met due to increased focus in 2015 and 2016. Timeline shows sustained efforts / focus.
USVLT Known on the Land									
<p>Concern: We need to increase our visual recognition/ branding</p> <p>Goal: Expand USVLT's visibility "on the land" through signage, programming, & landowner involvement</p>									
Availability of land for teaching/ enjoyment	2013 retreat objective	Staff	Goal not met	X	partially met		X	X	General consensus that this is an important item for sustained focus with partnership organizations such as Tin Mountain. Timeline shows sustained focus.
Design custom signs for well-visited preserves; roadside signs; etc.		Staff	Goal not met	X	goal met!				General consensus that both the design of and installation of signage is an important action item for nearterm focus.
Inform (by mail) neighbors of conserved lands to foster sense of community	2013 retreat objective	Staff	Goal not met		Goal NOT met		X		General consensus that this is an important action item; slight postponement due to capacity issues.

GOAL-TRACKING SPREADSHEET

UPPER SACO VALLEY LAND TRUST - STRATEGIC ORGANIZATIONAL PLAN - 2017 REVISION

↓ INDICATORS OF SUCCESS / ACTION ITEMS	SOURCE*	RESPONSIBLE PARTY	2016 STATUS	...within 3 years...	3 year status, closed projects	3 yrs, inclusive of options signed	...within 5 years...	...within 10 years...	COMMENTS on TIMELINE / GROWTH METRICS*
Initiate Signature Event									
<p>Concern: We need to expand our organization's visibility in the communities we serve and be recognized as a community-oriented non-profit</p> <p>Goal: To implement a signature event and/or grow current programming into a signature event that is the "Talk of the town"</p>									
Convene subcommittee meeting	2011 SOP Objective 4.3	Outreach Comm/ Devt Comm/ Staff	Goal Met!		goal met!				
Initiate planning	2011 SOP Objective 4.3	Outreach Comm/ Devt Comm/ Staff	In process	X	goal met!				Planning is underway; timeline shows continued planning in immediate near-term.
Host event	2011 SOP Objective 4.3	Outreach Comm/ Devt Comm/ Staff		X	goal met!				Timeline shows execution of goal within 3 years.
Membership Growth									
<p>Concern: Membership is core to what we do; without strong membership, we will lose momentum/ focus/ funds</p> <p>Goal: To continue to grow our membership as both our "core community" and our most reliable source of income</p>									
Grow membership 5-10% annually for five years	2011 SOP objective 4.1; 2013 retreat objective	Devt Comm/ Outreach Comm/ Staff	520	600	655		660	1,030	Former goal of 15-20 percent growth was lowered based on feedback and track record of successful membership campaigns; strongest growth of membership tied to new land projects for which we fundraise; growth rate adjusted downward due to capacity issues and availability of such community-oriented fundraising projects. Timeline shows sustained focus at 5% growth in years 1-5, per original goal, and then with similar trajectory out to 10-year mark.
Outreach events to non-constituents (library/ rotary/ etc.) - 4x/yr	2011 SOP objective 4.1; 2013 retreat objective	Devt Comm/ Outreach Comm/ Staff	Goal Partially Met	X	partially met		X	X	Easy, low-hanging fruit. Encourage Board members to use existing peer networks that would result in enlisting staff (or Board) to give presentations, etc. Timeline shows nearterm action and sustained focus.
Maine residents - targeted mailing	2011 SOP objective 4.1; 2013 retreat objective	Devt Comm/ Outreach Comm/ Staff	Goal not met	X	Goal NOT met		X		Timeline shows nearterm action.
Younger/ recreational communities - targeted focus on inclusiveness between groups/ clubs/ other 501(c3)	2011 SOP objective 4.1; 2013 retreat objective	Devt Comm/ Outreach Comm/ Staff	Goal Partially Met	X	goal met!		X	X	Recently established links with Mtn Bking/ Climbing community, mostly due to Board member cross-over and EES events; Timeline shows sustained efforts to cultivate these relationships.
Business Partnerships									
<p>Concern: With a strong retail economy, we need to continue to grow our business partners to remain healthy/ seen/ known</p> <p>Goal: To continue to grow our business partnership program</p>									
Recruit 1 Contribute to Place partners / yr	2011 SOP Action 4.5.5; 2013 retreat objective	Staff	Goal Partially Met	X	Goal NOT met		X	X	Great success to date with respect to outreach (due to hiring Devt Associate), but no one has signed up for the opt-out CTP program. Reduced goal from 2 new CTP partners/ yr to 1 based on feedback. Timeline shows immediate and sustained efforts.
Recruit 6 other biz partners (1% for the planet, Valley-Made, etc.)	2011 SOP Action 4.5.5; 2013 retreat objective	Staff	Goal Partially Met	X	partially met		X	X	Hiring Devt Associate has made these goals achievable. Timeline shows immediate and sustained efforts.
Strengthen partnerships by providing resources/ support/ training	2011 SOP Action 4.5.5; 2013 retreat objective	Staff	Goal Met!	X	partially met		X	X	Hiring Devt Associate has made these goals achievable. Timeline shows immediate and sustained efforts.

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6. SPECIAL FOCUS AREAS									
Agriculture									
<p>Concern: We need to play an active role in keeping farmland in farming, and recruiting new farmers to the area; saving land is only first step</p> <p>Goal: To facilitate easy access to land (\$, logistics, support); to bridge other org's conversations around this topic</p>									
Actively research what other area orgs are doing to facilitate access to the land	2015 retreat objective	Contract employee	Goal Met!		goal met!				Timeline not needed (discrete goal met).
Conduct gap analysis of action needed in this area	2015 retreat objective	Contract employee	Goal Met!		goal met!				Timeline not needed (discrete goal met).
Create plan of action / seek funding/ hire position to address needs discovered in gap analysis	2015 retreat objective	Ag Steering Comm	Goal Met!		goal met!				Timeline not needed (discrete goal met).
Continue to conserve farmland and facilitate farmland access	2015 retreat objective; de facto (core mission)	Land Committee	In process	See Section 1 - "Saving Land: Conservation Impact" for metrics associated with increased focus on this topic.					
Water									
<p>Concern: Water pollution (point-source and non-point-source) and extraction are growing concerns as we learn more about our regional aquifer and its importance in the communities we serve</p> <p>Goal: To become conversant with water extraction and pollution (surface water and groundwater) issues & seek partnerships for solutions</p>									
Organize 2+ specific Board/ staff workshops with trusted/ knowledgeable experts	2015 retreat objective	SACo/ Water committee (new?)	Goal not met	X	Goal NOT met				Near-term action, as necessary.
Actively research what other area orgs are doing to study water extraction and any policy action taken to date	2015 retreat objective	SACo/ Water committee (new?)	Goal Met!		goal met!				Timeline not needed (discrete goal met).
Conduct gap analysis of action needed in this area	2015 retreat objective	SACo/ Water committee (new?)	In process	X	goal met!				Near-term action, as necessary.
Create plan of action / seek funding/ hire position to address needs discovered in gap analysis	2015 retreat objective	SACo/ Water committee (new?)	In process	X	partially met				Near-term action, as necessary.
Continue to conserve lands with highly valuable water-related resources (wetlands, river frontage, etc.)	2015 retreat objective; de facto (core mission)	Land Committee	In process	See Section 1 - "Saving Land: Conservation Impact" for metrics associated with increased focus on this topic.					

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7. ORGANIZATIONAL HOUSEKEEPING									
Policy, Procedure & Standard Template Revisions									
<p>Concern: We need to ensure that our policies, procedures and template documents reflect what we do. Goal: To ensure proper organizational function, keep templates, SOPs and policies current</p>									
Together with annual review of Board binder, review Board-approved policies and update	new	Staff/ Exec Comm	Goal not met	X	partially met		X	X	Timeline shows near-term and sustained focus.
Update Standard Operating Procedures (SOPs) annually (eg the "admin process document") and create new SOPs as needed/warranted	new	Staff/ Exec Comm	Goal not met	X	goal met!		X	X	Timeline shows near-term and sustained focus.
Periodically review CE templates, introductory landowner packet information, fundraising materials & solicitation handouts, membership forms, timesheets, milage and reimbursement sheets, etc.	new	Staff/ Exec Comm	Goal not met	X	goal met!		X	X	Timeline shows near-term and sustained focus.
Annual Work Plans									
<p>Concern: Committees and staff need clear goals outlined in order to streamline work and complete long-delayed tasks Goal: To create committee & staff work plans on an annual basis</p>									
Implement staff work plans, based on newly adopted Strategic Organizational Plan	new	Staff/ Exec Comm	Goal not met	X	partially met		X	X	Timeline shows near-term and sustained focus.
Implement committee work plans, based on the newly adopted Strategic Organizational Plan	new	Land Comm & Devt Comm with staff input	Goal not met	X	partially met		X	X	Timeline shows near-term and sustained focus.
Re-Accreditation									
<p>Concern: We should be prepared for re-accreditation in 2020 Goal: Start work involved in re-accreditation early to ensure smooth application process.</p>									
Review new/ updated Standards & Practices as published by LTA	new	Staff/ Exec Comm	Goal not met	X	goal met!				Timeline shows near-term and sustained focus.
Prepare re-accreditation application	new	Staff/ Exec Comm	Goal not met		n/a (later target)		X		Timeline shows focus at time of re-accreditation (2020)
Succession Planning									
<p>Concern: We should be prepared for the imminent or eventual departure of key staff & Board (and, this is likely to be a new LTA requirement/ new element of Standards & Practices) Goal: To create a Succession Plan that meets LTA's requirements and is useful and particular to USVLT</p>									
Review template documents, as available	new	Staff/ Exec Comm	Goal not met	X	Goal NOT met				Near-term action, as necessary.
Work with Executive Committee to craft a Succession Plan for Board adoption	new	Staff/ Exec Comm	Goal not met		Goal NOT met		X		Timeline shows focus at time of re-accreditation (2020)

* EXPLANATION OF ACRONYMS

AYO = Assessing Your Organization, conducted by the Executive Committee in 2014

SOP = Strategic Organization Plan, last official update November 2011

NRI = Natural Resource Inventory, published in 2012, synonymous with "Phase I" of the SCP

SCP = Strategic Conservation Planning process (as distinct from the SOP process), which occurred from 2010 through 2013

RDM = Resource Data Model, the GIS-based computer model that produced weighted scores for the Focus Areas identified in the NRI

LTA = Land Trust Alliance, a national land conservation oversight non-profit, which produces Standards and Practices and runs the independent Accreditation Commission