

# New Canaan Land Trust 2019 – 2024 Strategic Plan

Adopted at the May 13, 2019 meeting of the Board of Directors

## Table of Contents

<b>Executive Summary</b> .....	<b>2</b>
Who We Are .....	2
Our Strategic Priorities .....	2
Our Mission.....	3
Our Vision .....	3
<b>Priorities, Goals, and Strategies</b> .....	<b>4</b>
Ensure Long Term Organizational Sustainability .....	4
Continue Growing NCLT’s Network of Protected Open Space .....	4
Steward Our Preserves .....	5
Engage the New Canaan Community in Our Mission.....	5
Effectively Govern, Staff, and Operate NCLT.....	6
<b>Benchmarks</b> .....	<b>7</b>
<b>Updating the Strategic Plan</b> .....	<b>10</b>
<b>Strategic Planning Process</b> .....	<b>10</b>

## Executive Summary

In late 2018 and early 2019, the New Canaan Land Trust embarked on a comprehensive strategic planning process. Throughout this process, we explored and evaluated our work, our place in the New Canaan community, and our vision for the future by seeking input from community leaders, property neighbors, members, and past and present board members. The goal of this process was to ensure that NCLT has a clear vision for our future and remains relevant to the community that we serve.

### Who We Are

*The New Canaan Land Trust preserves, protects and restores open space for the long-term benefit of our community. We actively steward nearly 400 acres of permanently-protected land while strategically seeking additional land donations within New Canaan. Caring for our properties, connecting people with nature and inspiring future generations is our fundamental purpose. We are driven by the imperative to safeguard these sanctuaries and protect our wildlife, watersheds, and ultimately our community, today and forever.*

Much has changed since NCLT was founded over 50 years ago as a land-holding and land-preservation organization. While we continue to protect open space, we have transformed into a vibrant community organization that understands the need to steward our properties and engage residents in our work. Our challenge in creating this Strategic Plan was to ensure that our legacy of conservation continued uninterrupted, while also building capacity for more robust land stewardship and community engagement initiatives. The added attention given to these initiatives demonstrates our ability to care for our lands after we protect them, and helps us to build community support for our work. These initiatives complement one another, and help to create greater success across our organization.

As an organization that is charged with protecting land forever, we need to balance these three initiatives with organizational sustainability and success. In this Strategic Plan, we have committed to ensuring long-term organizational sustainability, and will work to keep our promise of perpetual land protection. We have also committed to effective governance and staffing, and to operating using today's best practices. These commitments will help to ensure NCLT's continued success.

After considerable thought and deliberation, we identified five specific strategic priorities for our organization. These priorities, and accompanying goals and benchmarks, are detailed in the body of the Strategic Plan.

### Our Strategic Priorities

1. *Ensure Long Term Organizational Sustainability*
2. *Continue Growing NCLT's Network of Protected Open Space*
3. *Steward Our Preserves*
4. *Engage the New Canaan Community in Our Mission*
5. *Effectively Govern, Staff, and Operate NCLT*

During the strategic planning process, the NCLT Board revised our mission statement, and created the organization's first vision statement. Our new statements reflect NCLT's

commitment to the strategic priorities for the immediate future, and provide a clear picture of our work and role in the community:

### Our Mission

*The mission of the New Canaan Land Trust is to foster a connection between the New Canaan community and its natural resources through the conservation and sustainable stewardship of our open space.*

### Our Vision

*The vision of the New Canaan Land Trust is a New Canaan community with abundant, protected open space and the imperative to safeguard its natural resources for the benefit and enjoyment of future generations.*

This Strategic Plan is ambitious, and achieving our goals will require hard work, commitment, and diligence. We are incredibly proud of our success and growth in recent years, but recognize and welcome the opportunities and challenges that lie ahead. We hope that this plan will facilitate continued success, and get us closer to realizing our vision for New Canaan and our organization.

## Priorities, Goals, and Strategies

To guide NCLT's work in the coming years, this Strategic Plan focuses on five specific priorities.

### Ensure Long Term Organizational Sustainability

NCLT's mission is directly linked to promoting the wellbeing of the community of New Canaan and by its very nature, is one that must be carried on in perpetuity. To that end, stability of organizational resources and relationships is essential.

#### Goals

To acquire the sufficient funds, knowledge, and resources needed to meet its land protection goals, fulfill its stewardship obligations, continue community engagement efforts and support annual operations.

#### Strategies

- a. Increase the total amount and overall stability of revenues as necessary to meet program goals.
- b. Explore and implement opportunities for the diversification of revenue sources such as special events, planned giving, corporate contributions, and consulting services.
- c. Prepare for perpetuity through the establishment of an endowment.
- d. Advance positive collaborations through strategic partnerships to leverage resources and achieve shared goals.
- e. Establish a permanent home for NCLT to meet the current and long-term needs of the organization.

### Continue Growing NCLT's Network of Protected Open Space

In 1967 the New Canaan Land Trust was created as an entity to help the community accelerate the rate by which open space was being protected in New Canaan. Today, we are reinvigorating the work started over 50 years ago by seeking to conserve properties with high conservation values, thereby protecting the ecological, water and scenic resources of our town.

#### Goals

To preserve and protect the open space of New Canaan for the long-term benefit of our community. By proactively safeguarding these lands, we seek to protect the fabric and character of New Canaan's landscape, for today and future generations.

#### Strategies

- a. Develop a strategic conservation plan to guide NCLT's land protection efforts, and the resources that will be used to protect parcels identified in the plan.
- b. Expand land conservation through purchase and donation of fee lands, conservation easements, and other conservation tools.
- c. Improve the community's understanding about the ecological and financial benefits of donating land, and how NCLT can facilitate conservation efforts.
- d. Build strong relationships with key landowners by serving as an expert resource on land conservation options, challenges, and opportunities.
- e. Foster partnerships with non-profits in New Canaan and the surrounding communities to facilitate cross-boundary conservation opportunities.

## Steward Our Preserves

The New Canaan Land Trust acknowledges its perpetual responsibility to protect and steward its lands, and is committed to providing the resources necessary to do so. Good stewardship entails the creation and implementation of property management plans, yearly monitoring of the sites, policy creation for good visitor experiences, educational opportunities and volunteer engagement.

### Goals

To sustainably manage NCLT properties, to maintain and enhance their conservation values, and to protect the land from uses that do not align with NCLT's mission and connect the community to the land.

### Strategies

- a. Protect the NCLT's legal conservation interests through annual inspections, updated management plans and prompt resolution of encroachment issues.
- b. Develop strong relationships with neighbors of NCLT's preserves and with conservation easement landowners.
- c. Maintain, and as appropriate, restore and enhance conservation values on NCLT's properties.
- d. Increase the accessibility of our trail systems, and ensure sustainable design to handle increased use.
- e. Actively recruit and manage new and existing volunteers to ensure proper maintenance of properties.

## Engage the New Canaan Community in Our Mission

To maintain its position as a leading environmental organization in New Canaan, strategic outreach efforts to share NCLT's mission, expertise, and resources with the community are imperative. Through opportunities such as educational programs, events, and outdoor recreation, in addition to relevant and timely communications, we work to spread a conservation and land stewardship ethic across our community.

### Goals

To foster an increased appreciation for land conservation and stewardship in our community by connecting more New Canaan residents to their natural surroundings and open spaces through a variety of experiences.

### Strategies

- a. Increase public awareness of NCLT, our mission and the ways in which we benefit our community.
- b. Become a leading advocate and resource for land and water conservation issues at the town level.
- c. Foster community support through public engagement with our properties, programs, and events.
- d. Expand partnerships with like-minded groups to achieve greater impact.
- e. Inspire New Canaan's youth through hands-on environmental education programs on our lands.
- f. Regularly evaluate the community's understanding of and engagement with NCLT and our mission.

## Effectively Govern, Staff, and Operate NCLT

The strength of the board and staff of the New Canaan Land Trust is critical to our future. Together they ensure that NCLT operates at the highest standards with transparency and accountability. As well as generously supporting NCLT with their time, financial support, and wisdom, board members bring a diversity of experiences, perspectives and professional talents critical for building success. Together the board and staff build support within the community to advance land conservation efforts by interacting with landowners, community leaders and interested residents.

### Goals

To ensure that NCLT operates in accordance with the Land Trust Alliance's Standards and Practices, has effective people and systems throughout the organization to provide direction and resources, and provides the follow-through needed to implement NCLT's mission and goals.

### Strategies

- a. Maintain accreditation through the Land Trust Alliance.
- b. Guide organization with effective planning, including succession planning for staff and directors.
- c. Cultivate an active, engaged, and well-informed Board of Directors.
- d. Match staff capacity to organizational needs.
- e. Maintain a high-quality work environment and recruit/retain excellent staff.
- f. Establish an Advisory or Community Council to involve key individuals from community in order to increase visibility, enhance major donor engagements, attract volunteers and potential Board members, as well as provide future visioning.

## Benchmarks

### 1. Ensure Long Term Organizational Sustainability

- a. 10% of all New Canaan households (~700 homes) are current members of NCLT by the end of the 2023-2024 fiscal year.
- b. Operating budget revenues meet or exceed expenditures each year.
- c. NCLT has developed a plan to acquire or build a permanent home for the organization by 2021, and is prepared to move to that home by 2024.
- d. NCLT has a diverse revenue stream that includes: 70% household donations, 15% corporate sponsorships, 10% event-related revenue, and 5% return on investments.
- e. NCLT has developed the systems needed to discuss and implement legacy giving with potential donors by 2020 and has at least one family committed to including NCLT in their estate charitable giving 2022.
- f. NCLT has designated \$500,000 towards a permanent endowment and maintains cash on hand to cover expenses for 12-15 months by 2024.

### 2. Continue Growing NCLT's Network of Protected Open Space

- a. NCLT has written a strategic conservation plan, started cultivating gifts of land from landowners identified in the plan and connected with at least 4 landowners per year.
- b. NCLT completes at least one land donation/purchase per year, focusing efforts and resources on properties identified in the strategic conservation plan.
- c. NCLT proactively educates property owners and the community on the public and tax benefits of land donations and conservation easements through at least two programs over the 5 years.
- d. NCLT continues its involvement in the Hudson to Housatonic Regional Conservation Partnership, and has developed strong relationships with land trusts from neighboring towns.
- e. Identify and recruit strategic partners capable of assessing the state of natural resources on NCLT properties for future conservation decisions.

### 3. Steward Our Preserves

- a. NCLT completes and documents property inspections and easement monitoring visits on an annual basis.
- b. NCLT has resolved all legacy encroachment issues in a fair, consistent and neighborly fashion by 2021 and promptly handles any new encroachment issues that arise.
- c. NCLT's Stewardship Committee reviews, and if necessary, revises, a property's management plan prior to any project or encroachment resolution, to ensure they reflect current thinking and work.
- d. NCLT identifies and recruits strategic partners capable of assessing the state of natural resources on our properties, as it pertains to stewardship decisions.
- e. NCLT hosts at least one neighbor/community event per year with special outreach to neighboring homeowners, rotating between NCLT's trailed properties.
- f. NCLT has a style guide for all signs across our properties, and has installed large property signs (at trailed properties), trail markers (at trailed properties), and property boundary markers (at all properties).
- g. NCLT participates in the New Canaan Pollinator Pathway initiative, and regularly communicates and partners with other environmental non-profits in town.

- h. NCLT completes the following stewardship projects by 2021:
  - i. Establish and properly maintain a wildflower meadow at the Silvermine-Fowler Preserve to support the initial project goals.
  - ii. Install adequate seating and meeting space at the Firefly Sanctuary, to accommodate heavy summer visitation and programs/events at the preserve.
  - iii. Restore the historic stone wall along the frontage of the Hicks and Hawkins preserves.
- i. NCLT completes the following stewardship projects by 2024:
  - i. Restore the historic stone wall along the frontage of the Betts (GreenLink) preserve.
  - ii. Install raised walkways/bridges on any and all portions of trails that are seasonally muddy or flooded.
  - iii. Install informational kiosks at all major trailheads.

#### 4. Engage the New Canaan Community in Our Mission

- a. NCLT offers monthly programs that engage New Canaan residents with our mission.
- b. NCLT develops a community education program specifically geared to land conservation, conservation easements, tax benefits, etc. to be delivered at least every other year.
- c. NCLT devises a volunteer recruitment and tracking system as well as management oversight.
- d. Develop an annual communications plan to detail and track community outreach including presentations to community groups, educational programs, social media, traditional media, testimonials, fundraising materials, etc.
- e. Cultivate an email list of a least 1500 names by 2022.
- f. NCLT's Summer Internship program is expanded to engage its interns and other high school students throughout the school year.
- g. NCLT annually advocates for the town to fund the Land Acquisition Fund, and for other conservation issues, as the board deems appropriate.

#### 5. Effectively Govern, Staff, and Operate NCLT

- a. NCLT adheres to the Land Trust Alliance Standards and Practices, and the internal policies that it developed during the accreditation process, and is prepared to renew its accreditation in 2024.
- b. NCLT's Policy and Governance committee maintains a robust list of qualified potential board members.
- c. NCLT offers quarterly development/education programs/workshops for the board to educate Directors about the complex issues surrounding the effective operation of a land trust.
- d. NCLT's committees are active and productive, generating regular reports to keep the board apprised of their activity.
- e. All board members actively participate in at least one NCLT committee.
- f. New NCLT Board Members attend the CT Land Conservation Conference within two years of joining the board.
- g. All board meetings have 80% or greater attendance and NCLT has explored telecommunication options to facilitate participation by those unable to be there in person.



- h. NCLT brings on a year-round, part-time staff person to support programming, events, and administrative responsibilities.
- i. NCLT strives to offer compensation and benefits in line with the Land Trust Alliance's "Salaries and Benefits Survey" report.

## Updating the Strategic Plan

This plan is intended to be a living document, that is reviewed and updated annually to accurately reflect the goals of the New Canaan Land Trust. The benchmarks identified in this plan should be reviewed on a quarterly basis to ensure that progress is being made towards NCLT's strategic goals, and that resources are being appropriately used to achieve these goals.

## Strategic Planning Process

This strategic plan was created by a committee consisting of the Executive Director, Aaron Lefland, and three Directors, Dave Hunt, Julia Portale, and Catharine Sturgess.

The research for this plan started in the winter of 2018 with a series of interviews, including:

- Key internal members of NCLT: Executive Director, current Directors, and a select group of former Directors
- Town Representatives: First Selectman, Town Council members, and commissioners from both the Conservation Commission and the Planning and Zoning Commission.
- Select community leaders: Director of the New Canaan Nature Center, President of the Waveny Park Conservancy, President of the Board of Realtors, and Director of the New Canaan Community Foundation
- Major Donors and Grantmakers

In March of 2019, Directors Beth Sanford and Nancy Bemis led a branding workshop, giving the Board an opportunity to discuss NCLT's role in the community, vision for the future, and effective ways to communicate our work. The results of that workshop were instrumental in the creation of this plan. In April of 2019, the Board gathered for a final strategy session, where revisions to the plan were made, and the new mission statement and vision statement were produced.

This strategic plan was adopted by the Board of Directors at their May 13, 2019 meeting.