

strategic plan

2015-2017

table of contents

Introduction	1
Direct Services to Land Trusts Through training, facilitation, and collaborative partnership, Gathering Waters engages with land trusts throughout the state to achieve sustainable conservation.	3
Government Relations & Public Policy Advocacy Gathering Waters advocates for public policies that strengthen land trusts and that promote land conservation in Wisconsin	6
Outreach Gathering Waters works to celebrate the successes of Wisconsin land trusts, tell the stories of their impacts and how they are addressing community needs, and promote their value to the citizenry they serve	8
Gathering Waters' Capacity Gathering Waters has a sustainable, diverse, and flexible resource base to fuel the creativity, pace, and agility with which we pursue our mission	11

OUR INSPIRATION

Energized by powerful geology, inspired by the natural beauty of our state and our inherited legacy of conservation leadership, and driven by the impact that these special places have on the lives of people, Gathering Waters advances Wisconsin's preeminent tradition of land conservation and stewardship by working to strengthen Wisconsin's land trust community.

OUR MISSION

Gathering Waters helps land trusts, landowners and communities protect the places that make Wisconsin special.

HOW WE WORK

Unlike any other organization, we accomplish our mission by strengthening Wisconsin land trusts – nonprofit organizations that protect land to preserve its natural, agricultural, or cultural value for public benefit. We:

- Provide direct technical assistance to non-profit land trusts
- Are non-partisan, solution-oriented advocates for public policies supporting land conservation
- Use our statewide voice to share the stories of land trusts' impact and how they addressing community needs, and inspire broad public support for land conservation

Additionally, we strive to incorporate best practices into every facet of our work and continually improve our processes.

OUR ACCOMPLISHMENTS

Since Gathering Waters' founding in 1994:

- The number of land trusts working in Wisconsin has increased from 12 to over 50
- The membership of Wisconsin's land trusts has grown to nearly 55,000 members statewide
- These land trusts have permanently protected well over 280,000 acres of Wisconsin's natural heritage
- We have successfully advocated for funding increases for the state's renowned land conservation program, the Knowles-Nelson Stewardship Fund, and for the passage of the Working Lands Initiative
- We have become a respected voice for private land conservation in the state and have has earned our reputation as the premier land trust service center in the nation

But more meaningful is the resulting impact of those acres conserved, organizations and collaborations established, and contacts made. Together with our land trust members, partners, and supporters, we are helping to protect the special places where we can all go to exercise and recreate, that protect our local food base and agricultural economy, where youth are discovering the magic of the outdoors for the first time, and that are home to our most precious resources threatened species.

OUR VISION: A STRONG WISCONSIN LAND TRUST COMMUNITY

We envision a strong and strategic land trust community working to meet the needs of the communities they serve and supported and celebrated by a Wisconsin citizenry that personifies the land ethic championed by Aldo Leopold. We understand that the advancement of our mission and the success of the land trust community are inextricably linked to the understanding that land conservation is essential to the economic, spiritual, and physical health of our communities.

OUR PLAN

Gathering Waters' core objective, since its inception, has been to strengthen Wisconsin's land trusts. This strategic plan is a reaffirmation of that core objective. Through this plan, we seek to understand how that objective affects everything we do. We are successful when land trust staff and boards see value in our programming and are strengthened by that programming.

This plan also brings to the forefront the importance of collaborations. Land trusts are demanding opportunities to collaborate--with each other and with other partners. In the past we have, and will continue to, promote collaboration through networking, shared trainings, and facilitation of joint programming. Additionally through this plan, we will explore opportunities to more smartly deploy land trust resources through the pursuit of economies of scale, shared back offices, and mergers. We will also engage outside partners – traditional and nontraditional - who can be allies in our work.

Finally, as land trusts exist to provide value to communities through land conservation, we will increase opportunities to share the stories of the value that land trusts bring to creating healthy and whole communities. We will also explore opportunities to increase the impact and value of our work by better understanding community needs and examining how our core competencies may provide even more value to our land trust members and Wisconsin's citizenry.

DIRECT SERVICES TO LAND TRUSTS

Through training, facilitation, and collaborative partnership, Gathering Waters engages with land trusts throughout the state to achieve sustainable conservation.

HOW WE WORK

Since its founding, Gathering Waters has offered operational expertise and information to Wisconsin land trusts. From organizational strategic planning to board orientation, from project-specific technical advice to our national Land Trust Standards and Practices, Gathering Waters provides staff time and expertise to aid Wisconsin land trusts. We provide opportunities for peer-to-peer learning, educate the pool of volunteer board members and professionals who work with land trusts, utilize national industry experts, and help Wisconsin land trusts prepare for accreditation. We do all of this at little or no cost to our membership.

As Wisconsin's land trust community matures, we continue to research and track new conservation tools and foster sustainable organizational development.

Increasingly, we use the sharing of land trust stories from around the state and nationwide as a learning tool. We facilitate partnerships between local land trusts, and with conservation, business, and civic leaders in their areas to help them identify new opportunities for creative, collaborative approaches to conservation.

Finally, working statewide to represent the interests of 50-plus land trusts, we continuously seek new opportunities to support their work to protect Wisconsin's natural heritage for future generations. If there are obstacles ahead – trends in public policy, the media or legal realms likely to challenge conservation success – we help Wisconsin's land trusts prepare to shift course or take action.

OUR THREE-YEAR GOALS & STRATEGIC ACTIONS:

1. GW will provide the state's maturing land trust community with the training and resources they need to achieve excellence.

- a. Continue to make the Land Trust Excellence & Advancement Program (LEAP) our signature land trust offering
 - i. Refine LEAP based on the lessons learned in the first three years, including how we message the program itself with land trusts
 - ii. Create program focuses in areas important to our land trust community (community engagement, financial systems, organizational strength, strategic conservation planning, innovations, land trust merger, community partnerships, etc.), maintaining relevance, usefulness and timeliness
 - iii. Develop better tools to communicate LEAP successes to the GW board, the land trust community, and the public
 - iv. Use the inventory created in Goal #2a below to focus future LEAP resources on new or current community partnerships

2. GW will work to achieve greater results in our land trust services program through collaboration and partnership.

In pursuit of this goal, GW will:

- a. As projects arise around the state, create an inventory of potential land trust partner organizations and individuals in and out of our current network. Share the stories of these projects with the land trust community as partnerships are formed
- b. Consider value added by our continued facilitation of the Lake Michigan Shorelands Alliance. Take actions, as appropriate, to modify our current involvement in order to improve the value to land trusts and GW
- c. Pursue regional or other land trust collaboration initiatives through shared services and replicate where appropriate
- d. Where appropriate, facilitate development of relationships between new potential partners/collaborators (from the inventory in goal #2a) and our member land trusts
- e. Create criteria that defines when and how we will do work with land trusts outside of Wisconsin (Cross reference strategic action in Goal #4c)
- f. Where appropriate, organize, train, and develop the professionals that land trusts partner with and/or use
- g. Explore creative mechanisms for conservation financing in Wisconsin by learning from land trusts nationwide
- 3. GW will work with Wisconsin's Land Trust Council to ensure that the needs of Wisconsin's land trust community are effectively represented in GW's strategic and annual work plans and to create a community of land trust leaders representing the interests of Wisconsin's 50+ land trusts.

In pursuit of this goal, GW will:

- a. Cultivate and utilize this resource on an ongoing basis. Modify framework
- b. Develop one or more new methods to integrate the land trust council and GW board meetings
- 4. Gathering Waters will foster and uphold high standards for Wisconsin's land trust community and membership in GW.

- a. Continue to address the needs of land trusts that do not yet meet our minimum standards, as well as land trusts that are unresponsive to our support
- b. Using our inventory of organizations created in Goal #2a, consider the composition of our membership with respect to non-traditional land trusts (e.g. Growing Power) or community land trusts
- c. Create criteria that defines when and how we will do work with land trusts outside of Wisconsin (Cross reference strategic action under Goal #2e)
- d. Consider enhancing our requirements of membership (such as continued learning requirements)

5. Gathering Waters will develop a system of support and intervention for at-risk land trusts (at-risk indicators could include: lack of easement monitoring, issues with organizational capacity, potential or actual organizational dissolution, requests for merger support).

- a. Working with the Land Trust Council, develop a working list of at-risk indicators
- b. Through training and on a case by case basis, support Wisconsin land trusts with their contingency planning, both broad-based and easement-specific
- c. Establish a conservation easement and fee lands back up strategy for GW
- d. Where identifiable, use inventory process in Goal #2a (among other tools) to track issues that might put a land trust at risk and incorporate these issues into annual work planning where possible

GOVERNMENT RELATIONS AND PUBLIC POLICY ADVOCACY

Gathering Waters advocates for public policies that strengthen land trusts and that promote land conservation in Wisconsin.

HOW WE WORK

Gathering Waters uses its unique leadership position in Wisconsin's conservation community to build broad, non-partisan support for public policies that provide land trusts, landowners and other partners with the resources and tools to accomplish strategic and lasting land conservation for the citizens of Wisconsin. We recognize that our leadership is firmly rooted in the diverse and vibrant network of Wisconsin's 50+ land trusts and the support of conservation-minded citizens across the political spectrum and that our success depends on our ability to demonstrate the value of land conservation to communities and decision-makers.

Gathering Waters strives to make the voices of individuals and the land trust community heard by state and federal lawmakers and government agency officials. We continuously seek new opportunities for public policies to encourage the work of land trusts and support efforts to protect Wisconsin's natural heritage for future generations.

OUR THREE YEAR GOALS & STRATEGIC ACTIONS

Under the leadership of the Gathering Waters' Policy Committee:

1. GW will advocate for federal, state, and local policies that provide expanded opportunities for land trust participation in public conservation programs and improve the durability of conservation tools.

- a. Promote a well-funded and effective grants portion of the Knowles-Nelson Stewardship Program and help shape the future of the program
- b. Advocate for maximum practicable funding of the Stewardship Program
- c. Support working lands protection programs, particularly the state's Working Lands Initiative
- d. Improve the durability of conservation easements in Wisconsin through legislation and education of land trusts and their advisors
- e. Collaborate with conservation partners on federal policy issues that support the work of land trusts, including, but not limited to, the enhanced tax incentive for the donation of conservation easements, easement programs in the Farm Bill, and the Great Lakes Restoration Initiative
- f. Explore creative mechanisms for conservation financing, including, but not limited to, loan programs, a state tax credit for the donation of easements and funding through provisions of the Clean Water Act

2. GW will work with federal, state, and local agencies on the administration and implementation of public conservation programs to allow for efficient and effective participation by land trusts.

In pursuit of this goal, GW will:

- a. Work with DNR staff and the Natural Resources Board to ensure that the grants process within the Stewardship Program becomes more efficient, flexible and predictable
- b. Work with DATCP staff on the implementation of state's Working Lands Initiative
- c. Work with agency officials at the federal level to improve the processes for land trusts to access federal funding, such as the Farm and Ranchland Protection Program (FRPP) and the Great Lakes Restoration Initiative (GLRI)
- 3. Gathering Waters will develop and maintain broad coalitions and partnerships with organizations and individuals interested in voluntary land conservation and will cultivate strong relationships between land trusts and key legislators, the Governor, agency officials and partner organizations.

In pursuit of this goal, GW will:

- a. Continue to work with individuals and organizations that have historically supported our top policy priorities such as the Knowles-Nelson Stewardship Fund and Working Lands Initiative.
- b. Develop relationships with other conservation partners and non-traditional partners to support public and private funding opportunities and policy initiatives that support and or enhance land conservation in Wisconsin.
- c. Build relationships with leadership in the Wisconsin legislature and Wisconsin's congressional delegation and look for opportunities to connect these elected officials with local land trusts.
- d. Develop relationships within the Governor's administration and leadership within key government agencies.
- e. Connect constituents to policy makers, sharing the impact of land trust work on communities.
- f. Annually conduct a legislative power mapping exercise to identify key legislators in key districts.
- 4. Gathering Waters will monitor and evaluate the opportunities and risks related to emerging legislative and administrative public policy issues.

In pursuit of this goal, GW will:

a. Identify and track emerging issues that may affect land trusts

OUTREACH

Gathering Waters works to celebrate the successes of Wisconsin land trusts, tell the stories of their impacts and how they are addressing community needs, and promote their value to the citizenry they serve.

HOW WE WORK

Wisconsin's economy, communities, and citizens derive value from and depend on the land. Our outreach strives to promote the impact that private, local land conservation has on our communities, air and water quality, wildlife, forestry, agriculture, tourism, quality of life, and the health of our minds, bodies, and souls. We understand that the growth and success of the land trust movement is inextricably linked to the efficacy and reach of this message.

As Wisconsin's land trust community has grown in size and sophistication since GW's founding, land trust service has necessarily expanded to mean more than direct consultation and technical assistance. We seek opportunities to champion the work of land trusts to connect them to necessary resources and ensure permanent land conservation. We cultivate a diverse and well-connected group of partners to enhance opportunities for private land conservation. We wield a statewide voice, and use it to herald the value of conservation and a vibrant land trust community to key audiences, including legislators, local community leaders, landowners, media, future conservation leaders, and potential donors.

We understand that effective communication is essential in all Gathering Waters' programs. The organization's success depends on how well and often we deliver compelling messages and information to wisely selected audiences. Of equal value in our pursuit of effective communications is thoughtful listening and the concerted pursuit of understanding the people we serve.

OUR THREE YEAR GOALS & STRATEGIC ACTIONS

Under the leadership of GW's outreach committee:

1. GW will grow the strategic direction and implementation of its outreach program to enhance our ability to achieve our mission.

- a. Complete a comprehensive outreach plan (akin to the annual fundraising plan or the policy agenda) that identifies opportunities, defines strategies, and prioritizes actions.
 - i. Define our current and aspired constituency, as well as what motivates them
 - ii. Pursue quantitative and qualitative methods to better understand the needs of our constituency and where opportunities exist to serve those needs
- b. Commit to learning from others, both inside and outside our constituency; seek lessons learned from others who do this work well

- c. Pursue funding to fully support a strategic and effective outreach program to reach the goals defined herein. [Pursued collaboratively with the Capacity program]
- d. Consider a board appointment, staff position, or advisory connection that represents the audiences we seek to serve
- e. Create a community engagement internship position to help advance the outreach goals defined herein
- 2. GW will work cooperatively with the land trust community to understand their programmatic and organizational needs, share tools to address their needs, and communicate our value proposition. [Pursued collaboratively with the Direct Services to Land Trusts program]

In pursuit of this goal, GW will:

- a. Quantitatively and qualitatively seek to understand the needs of Wisconsin's land trusts and use that understanding in our program design
- b. Develop means for more open and frequent communication among the land trust community
- c. Expand enhancement of our print and electronic communications to share the value of our work, conservation news and action alerts, and opportunities for engagement
- d. Continue to commit to personal face-to-face time with land trust leadership, including attending a minimum of eight land trust board or committee meetings, eight land trust events, and 20 one-on-one meetings per year
- e. Improve interaction between GW and its land trust members by inviting the Land Trust Council to attend one board meeting per year and seek opportunities for other meaningful interaction between land trust leaders and GW leadership
- 3. GW will effectively encourage potential funders to support the work of Wisconsin's land trusts and GW. [Pursued collaboratively with the Capacity program]

In pursuit of this goal, GW will:

- a. Demonstrate how our work and the work of land trusts is relevant to people's lives and share stories of how that work has impacted real people
- 4. GW will effectively encourage policymakers and public officials to support public policies that benefit land conservation. [Pursued collaboratively with the Government Relations program]

In pursuit of this goal, GW will:

a. Connect constituents to policy makers, sharing the value of land trust work to communities

- b. Annually conduct a legislative power mapping exercise to identify key legislators in key districts.
- 5. GW will build productive relationships with potential partners to enhance and build greater support for the work of land trusts.

In pursuit of this goal, GW will:

- a. When appropriate, explore partnerships and alliances with organizations that share a common interest, can help advance our goals, and through which we can broaden our reach and build more support for private land conservation in Wisconsin
- b. Explore pursuing a workshop where we bring together land trusts and potential partners to discuss opportunities to work together to advance mutual goals. [Pursued collaboratively with the Direct Services to Land Trusts program]
- 6. GW will grow the collective public awareness of, and appreciation for, the work of land trusts.

- a. Create and strategically disseminate engaging and effective materials and messages that resonate with people; in their terms, and in their language; including but not limited to one annual newsletter and one annual report, daily Facebook posts, weekly blog posts, monthly e-news editions, action alerts, and bi-monthly conservation stories
- b. Work with at least one land trust a month to identify their stories of impact, communicate these stories via our various outreach media, develop an inventory of these stories that demonstrate lessons learned, and explore the potential of compiling these stories in a publication akin to Stories of Stewardship and In Their Own Words.
- c. Examine opportunities to reach new and broader audiences through the creative use of our existing outreach toolbox, as well as through other innovative technology (i.e. explore how to effectively utilize Twitter, YouTube and other social media to advance our goals).
 - i. Grow our Facebook fans by 150%
 - ii. Grow average blog hits to 50 per post
 - iii. Maintain open rate of 25% or greater for e-news and other mass email communication
 - iv. Launch our Twitter account and grow followers to 500
- d. Cultivate and maintain positive and productive relationships with media through a minimum of six contacts per year to share the impacts of land trust work and the creation of an "experts list."

GATHERING WATERS' CAPACITY

Gathering Waters maintains a sustainable, diverse, and flexible resource base to fuel the creativity, pace and agility with which we pursue our mission.

HOW WE WORK

The implications of Gathering Waters' mission are multifaceted, and we work in a dynamic and evolving environment. Gathering Waters is firmly committed to maintaining a strong resource base of diverse and predictable dollars, tools, expertise, and leadership from which we can draw to ensure our ability to assist Wisconsin land trusts, achieve our long-term vision and respond to immediate opportunities.

Gathering Waters pursues annual growth of our membership and major donor bases. Our members are the backbone of our organization; we strive to acknowledge them accordingly. We personalize membership cultivation and offer creative opportunities for members to be involved in our organization. We also offer planned giving opportunities to supporters interested in leaving a conservation legacy.

We understand that grants are critical to our program success as well, so we invest in relationship-building with local and regional foundations and the business community. Through printed material, events, and other outreach efforts, we continue to raise the profile of Gathering Waters among potential donors, land trusts and civic and political leaders and promote our organization as an essential partner to anyone interested in supporting land conservation in Wisconsin.

We also understand that in order to continue to grow and reach new and broader audiences interested in supporting our mission, we must continually push ourselves to work creatively and seek out and promote the ways in which our work impacts the varying interests and needs of Wisconsin's diverse populous.

Gathering Waters is determined to maintain a flexible, supportive and fun working environment that inspires dedicated, expert staff. We recruit and retain extraordinary talent. We provide our staff the tools they need to thrive in their positions including professional development opportunities that forward both individual and organizational ambitions.

Gathering Waters works to attract and develop well-connected, excellent leadership. Our board of directors is thoughtfully and strategically recruited, oriented to board service and given meaningful opportunities to carry out their commitment. We take purposeful steps to expand our circle of close friends and advisors.

OUR THREE YEAR GOALS & STRATEGIC ACTIONS

1. Gathering Waters will secure ample resources to carry out annual programmatic goals for direct services to land trusts, public policy advocacy, and outreach.

In pursuit of this goal, GW will:

a. Grow our overall revenue by 10%

- i. Pursue a comprehensive review of our fundraising systems, and identify and pursue opportunities to improve
- ii. Restructure and expand the Land Legacy Society to include individuals, land trusts, businesses, and planned givers
- iii. Grow our membership by 30% and maintain a 66% annual membership retention rate
- iv. Strengthen relationships with our membership to grow the Land Legacy Society by 35%, increasing our proportion of unrestricted support
- v. Maintain existing restricted funding for our programs and projects and grow grants support by 5% by building and strengthening relationships with private foundations, corporate donors, and government agencies
- b. Maintain current levels of marketing of the Sustainers Circle, but by the end of the plan period, determine whether we'd like to be more proactive and consider an endowment campaign. (e.g. Publish periodic planned giving features in Crosscurrents, maintain a planned giving page on our website, etc.)
- c. Continue to pursue opportunities to cooperatively fundraise with land trusts
 - i. Organize a minimum of three co-hosted events per year
 - ii. Enact a GW/LT cooperative fundraising policy
 - iii. Commit to growing our presence at land trust board meetings and events
 - iv. Further develop our value proposition messaging to land trusts
 - v. Work cooperatively with land trusts to cultivate their supporters, as appropriate and when it doesn't interfere with support of the land trust
- d. Under the leadership of the finance committee, invest our funders' contributions wisely and adhere to operating budgets that maintain unrestricted reserves equaling roughly 70% of the annual operating costs of the organization
- e. Evaluate and, if found to be beneficial, implement, fee for service options and dues structure to maximize the benefits of our services to Wisconsin land trusts while maintaining judicious and resource-efficient annual budgets. [cross-reference with direct services to land trusts strategic actions]
- f. Prioritize personal interactions and create meaningful and strategic

opportunities to engage and recognize donors.[cross-referenced with outreach strategic actions]

- i. Assign VIPs contacts to board and staff and develop a tracking tool to ensure 4 6 meaningful contacts with each VIP per year
- 2. Gathering Waters will maintain a knowledgeable and engaged Board of Directors who reflect the diversity of constituencies across Wisconsin and who are committed to providing leadership in pursuit of our mission.

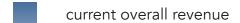
In pursuit of this goal, GW will:

- a. Charge the executive committee with creating and maintaining biennial leadership succession plans
- b. Recruit committed, well-connected, and strong leaders to fulfill the board composition goals defined by the governance committee
- c. Pursue opportunities to maintain a stronger connection with the land trust community (e.g. Invite the Land Trust Council to attend one board meeting a year.) Strive to offer board members training in areas in which they would like to contribute but are unsure how
- d. Provide board members and advisors with a variety of engagement opportunities and offer an active and effective slate of committees on which to serve
- e. Review the role of the Advisory Council and make necessary changes
- 3. Gathering Waters will maintain a driven, talented staff, as well as cutting edge technology and infrastructure to operate efficiently and effectively to meet the changing needs of GW and the Wisconsin land trust community.

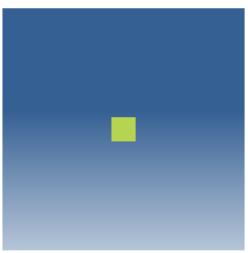
- a. Hire the best and the brightest from interns to directors, foster their professional development, maintain the standard for competitive compensation in our field, and prioritize opportunities to promote from within
- b. Maintain a productive work environment by nurturing a flexible, supportive, creative and fun atmosphere through semi-annual fun days, lunch bunch, "good things," etc.
- c. Review and invest in technology and infrastructure needs to meet the industry standard and ensure the staff's unfettered ability to successfully fulfill their responsibilities
- d. Develop a staff succession plan, including an evaluation of staff roles and responsibilities and cross-training needs per the parameters of the strategic plan
- e. Pursue an objective review of our personnel policies

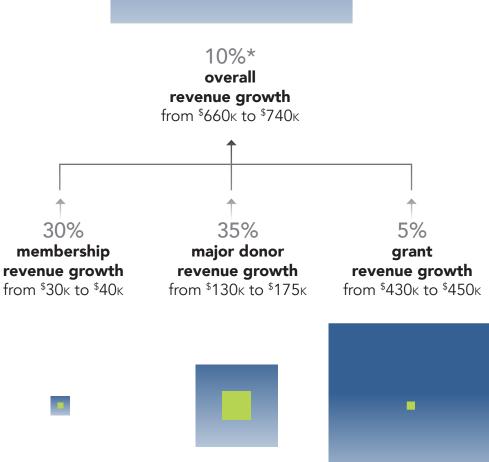


DESIRED REVENUE GROWTH 2015 - 2017



desired revenue growth shown as a percentage of the current revenue







^{*} Revenue categories do not add up to equal the whole because there are smaller sources of revenue not represented here