



Sudbury Valley Trustees

Sudbury Valley Trustees Strategic Plan July 1, 2018 – June 30, 2023

Approved by Board of Directors, June 13, 2018

Context for SVT 2023 Strategic Plan

Our mission remains our focus, and we will make clear that our work to protect natural areas also includes farmland, i.e.,

SVT works to protect natural areas and farmland for wildlife and people in the 36 communities that surround the Sudbury, Assabet, and Concord Rivers.

SVT fulfills its mission through three equally important, synergistic program strategies:

- a. We conserve land.
- b. We take care of natural areas.
- c. We provide people with opportunities to connect with nature and to act for conservation.

Today, our region's natural areas face critical **challenges**:

1. Development pressure. At the current pace of land protection and development, we may lose half of the important unprotected habitat, farmland, and recreational areas to development in the next 30 years. In other words, the current pace of land protection by SVT and others is inadequate.
2. The work of land protection has become very complex, requiring additional time, money, and expertise.
3. The work of caring for protected natural areas has also become increasingly complex. Many things threaten our protected natural areas, such as invasive species, misuse by people, and a changing climate.
4. First-class stewardship of our properties and conservation restrictions is a fundamental obligation. While important, the Land Trust Accreditation Commission stewardship standards do not adequately ensure healthy habitats and a high-quality visitor experience. Thus, we work to exceed these basic standards. As we take on more properties and as we address the myriad, complex issues that threaten our natural areas, we must expand our stewardship capacity.
5. Many local land trusts and municipalities lack sufficient resources to ensure high-quality stewardship of the region's other protected natural areas.
6. Our society has largely moved "indoors" and is becoming increasingly disconnected from natural areas and the myriad benefits that these natural areas provide. The result: fewer people are caring and acting for natural areas.
7. SVT has earned and is sustaining a strong base of dedicated members. However, that membership base needs to be refreshed and scaled to the goals and strategies that emerge for both our land protection and stewardship work.

At the same time, our 36-community region offers terrific ***opportunities*** to advance our mission:

1. Analysis shows that there is still very important land protection work to do: we have identified at least 85,000 acres of land that is not yet protected but provides critical habitat, working forests or farms, and/or nature-based recreational opportunities.
2. We have a strong network of municipal and nonprofit organizations that is working to protect natural areas. If equipped with further tools and resources, we feel the collective partnership can significantly increase its impact.
3. SVT is positioned to inform and unite conservation strategies throughout the region. The result: together with our partners, our efforts can become more effective and efficient.
4. Our efforts to expand programming that connects people to natural areas has been well received – despite society’s move “indoors” we are learning that people will re-connect to natural areas if given the opportunity.
5. We have an extraordinary base of members, volunteers, major donors, and staff. Together, this group forms a strong base upon which we can grow our work and impact.

Taking the long view: SVT’s impact in the year 2050:

1. Through fee acquisition, direct assists, and CRs, we will have protected an additional **12,000** acres of land that supports valuable wildlife habitat, farmland, and/or nature-based recreational opportunities.
2. Through first-class stewardship, we will have restored and are maintaining habitat that is important for wildlife and are providing people with high-quality opportunities to experience nature.
3. Through our intentional work to build the capacity of others, our partners will have accelerated their efforts to protect and care for land.
4. As a welcoming and inclusive organization, we will have engaged more people in the act of conservation; we have increased our strong base of supporters and volunteers by 50% and this base includes a diversity of individuals and partners from all parts of the region.
5. We remain one of the best conservation organizations for which to work and volunteer.

The following plan outlines the goals, strategies, and actions that SVT will pursue over the next five years.

Goal A: Accelerate Our Land Protection Efforts

Long-range desired outcome:

At least 12,000 additional acres protected by SVT through fee, CRs, and direct assists.

Strategy #1: Strengthen the ability of local land trusts, municipalities, and other allies to protect vulnerable, high priority lands in their communities.

Actions:

- a. Facilitate the development and adoption of a regional vision for land conservation that unifies the efforts of our 36 communities.
- b. Foster the WSCC's Land Protection Work group to identify subregion priorities and plans.
- c. Expand and improve communications, trainings and other resources that will help our allies protect land locally.
- d. Engage local land trusts and/or key municipal committees individually, as needed, to ensure SVT understands (a) their respective priorities and challenges and (b) how they perceive SVT could be most helpful to them and their communities.
- e. Help local land trusts and/or key municipal committees identify priority properties and conduct outreach to key landowners.
- f. In collaboration with MLTC and several of our established local partners, develop alternative collaborative models that SVT could offer to assist local land trusts or citizen groups.
- g. Establish an external revolving fund.
- h. Enlist new lead partners in the WSCC collaborative effort.

Strategy #2: Increase our land protection efforts/resources in towns with the most high priority lands. *(Towns with "high priority lands" will be updated annually; today, this includes about 10 of SVT's 36 communities.)*

Actions:

- a. Conduct Cost of Community Services studies to show impacts of unplanned development.
- b. Cultivate key community members who support conservation efforts and with their assistance develop town-by-town multi-year action plans to accelerate conservation in their respective towns, including, e.g., passing CPA, Bond Bills, landowner seminars, local land trust assistance.
- c. Complete the "High Ridge" aggregation project.
- d. Scope out and initiate one additional aggregation project.

Strategy #3: Acquire fee reservation(s) and CRs.

Actions:

- a. Complete a comprehensive inventory of high priority properties and landowners based on our most recent priorities map; develop and implement a prioritized action plan for their protection.
- b. Identify the potential "flagship" properties across watershed and develop/initiate an action plan for their acquisition.

Goal B: Provide excellent care for SVT's properties, and facilitate the delivery of improved stewardship at the region's other natural areas so that they:

- a. Provide quality habitat for our region's wildlife.
- b. Provide people with a high-quality opportunity to experience nature.
- c. Strengthen our region's ability to withstand and adapt to climate change.

Strategy #1: Strengthen the ability of established collaborations (the West Suburban Conservation Council – WSCC; and the Cooperative Invasive Species Management Area – CISMA) to advance the shared goal of providing excellent stewardship of the region's natural areas.

Actions:

- a. Assume the role of CISMA administrative “coordinator” to sustain this collaborative's good work.
- b. With members of CISMA and the WSCC, explore and implement ways to unify the work of these collaboratives.
- c. Facilitate the development and adoption of a shared vision that sets the standard for stewardship success and help identify key strategies for pursuing this vision.
- d. Facilitate the development (where needed), adoption, and sharing of best practices.
- e. Invite other lead organizations to become active participants in these collaboratives.

Strategy #2: Provide exemplary stewardship of SVT's properties.

Actions:

- a. Maintain stewardship procedures for fee properties in accordance with LTA Standards and Practices.
- b. Create new management plans for newly acquired fee properties and keep current all other plans.
- c. Address at least all moderate and high priority action items outlined in established management plans.
- d. Update SVT's priorities for biodiversity projects and address at least the top 5 projects.
- e. Provide visitors with a high-quality experience by making sure that all SVT properties with trails have a roadside sign, current trailhead information, current accessible (online and/or paper) trail map, and a well-maintained and marked trail system.
- f. Implement the landscape plan for Wolbach Farm.

Strategy #3: Ensure the protection of conservation values on CRs.

Actions:

- a. Maintain stewardship procedures for CRs in accordance with LTA Standards and Practices.
- b. Pilot an effort to help landowners improve the conservation values of CRs: enlist 2-3 CR landowners to create and implement a management plan for their property.
- c. Engage CR landowners through a variety of methods: develop and distribute a landowner booklet; host two CR landowner events.

Strategy #4: Directly assist others to improve stewardship of high priority habitats and/or recreational trails on high value lands where SVT can add significant values AND where there is a strategic advantage in providing that assistance.

Actions:

- a. Provide access and trail management on high value lands (e.g., Mainstone).
- b. Establish working agreements with municipal partners or other conservation land owners that enables SVT to advance conservation benefits and other organizational priorities on high value lands. (e.g., Horse Meadows Knoll).
- c. Jointly prepare management plans with abutting conservation land owners for natural areas whose stewardship clearly depends upon a joint, integrated approach; work with partners to raise funds and carry out the shared plan (e.g., Greenways).

Goal C: Engage and activate more champions for the conservation of the region's natural areas.

Strategy #1: Improve SVT's brand so that it is more visible to and better understood by a broader audience.

Actions:

- a. Develop and deliver communication & outreach plans that have been tailored primarily to high priority land protection communities, property visitors and urban audiences.
- b. Continue to co-brand SVT/Sudbury Valley Trustees and create a succinct tag line that communicates the essence of our work.
- c. Expand SVT's Social Media and E-News Presence and convert followers/subscribers to active supporters and/or volunteers; implement and assess at least 1-2 new social media or on-line tactics annually and adapt SVT's approach based on that experience.

Strategy #2: Sustain and grow our network of volunteers.

Actions:

- a. Develop a robust network of SVT Volunteer Community Ambassadors.
- b. Survey our volunteers biennially [See Goal D; Strategy #3] and develop actions to address any outstanding issues or opportunities associated with the program's administration.

Strategy #3: Expand SVT's non-partisan work to advocate for policies and funding that advance land protection and stewardship.

Actions:

- a. Assist with CPA passage (or another local funding mechanism such as an open space bond) in six of the region's communities.
- b. Provide outreach and advocacy support around local land protection or stewardship campaigns.

- c. Lobby legislators for increased state funding for conservation programs, and through WSCC encourage coordinated effort to do the same by regional allies.
- d. Research, develop, and communicate a short list of legislative priorities and ask our members to support these.

Strategy #4: As part of a collaborative effort to “green” Framingham, champion the protection and stewardship of natural areas and other open spaces throughout the City, and engage Framingham’s urban residents in this work.

Actions:

- a. Collaborate with Green Framingham United and other key community members who support conservation efforts and with their assistance develop a vision and multi-year action plans to accelerate the protection and improved stewardship of open spaces in all of Framingham.
- b. Help Framingham pass CPA and/or increase open space funding via another mechanism.
- c. Based on the plan in Step One, carry out at least one project annually in “urban” Framingham that protects more land, improves stewardship of a natural area, and/or connects urban residents to open spaces and to SVT’s work.

Strategy #5: Increase and focus SVT’s current level of public programming and outreach to advance other objectives in this plan.

Actions:

- a. Allocate 25% of SVT’s programming and outreach to communities where SVT has an established presence to sustain and energize our existing strong support in those towns.
- b. Allocate 65% of SVT’s programming and outreach to SVT’s “new” communities to build awareness of the benefits of land protection and stewardship. These are towns where we have recently become active (since 2013) or where we are focusing our new land protection and stewardship efforts.
- c. Allocate 10% of SVT’s programming and outreach to the remaining communities in SVT’s service area.

Strategy #6: Nurture SVT’s strong membership base

Actions:

- a. Establish 1-2 signature events that celebrate and energize SVT’s membership community and which provide a high profile program for engaging new supporters.
- b. Strengthen and further customize communications with existing supporters so as to:
 1. Recognize SVT members at significant milestones.
 2. Relate SVT’s work to a member’s reason for supporting SVT.
 3. Recognize and celebrate our members’ support.
- c. Survey SVT members every five years and update our engagement strategies based on what these surveys tell us.

Strategy #7: Establish, implement, and based on a cost/benefit analysis, continually adapt a suite of membership recruitment tactics.

Actions:

- a. Initiate or expand an established relationship with youth & family organizations that work with teens/young adults in out-of-classroom settings.
- b. Implement and assess at least 1-2 new recruitment tactics annually and adapt SVT's approach based on that experience.
- c. Conduct an annual review of all of SVT's recruitment tactics and update workplans to reflect results.
- d. Evaluate, revise, and test SVT's Business Membership program.

Goal D: Strengthen SVT's capacity to protect and care for our region's natural areas – today and in perpetuity.

Strategy #1: Grow SVT's major giving program.

Actions:

- a. Create and implement a "moves" plan for SVT's existing major donors.
- b. Develop a plan for identifying, cultivating, and recruiting major donor prospects.

Strategy #2: Market (and possibly expand) SVT's Legacy Giving program (aka Living Waters Society).

Actions:

- a. Determine the feasibility of providing the full array of legacy giving options and if practical, include these in the Living Waters Society.
- b. Market this program to SVT's members, volunteers, and professionals (financial advisors, lawyers) who specialize in estate planning.

Strategy #3: Ensure that SVT is one of the best conservation organizations for which to work and volunteer.

Actions:

- a. Survey staff and volunteers biennially to monitor and track feedback across a wide range of issues and work to address priority issues.
- b. Continue to evaluate and adjust our overall compensation packages to ensure that we attract and retain the best staff possible.
- c. Strengthen our work planning and evaluation program to establish clear goals, foster collaboration, facilitate professional growth, and reward exceptional performance.
- d. Continue to evaluate and, where necessary, adjust our human resources policies to ensure that they are fair, transparent and well-understood.

Strategy #4: Diversify the Board, Committees, Staff, and volunteers so that the “face” of SVT provides a reasonable representation of the cross-section of the region’s population.

Actions:

- a. Research and apply a suite of communication tools to attract and engage a more diverse constituency.
- b. Recruit and retain staff and governing volunteers from varied and traditionally under-represented backgrounds.
- c. As part of our Framingham Strategy, reach out to minority communities to learn about the role that natural and cultural resources play in their lives and use this new-gained knowledge to shape our messages and engagement tactics. [See Goal C, Strategy #1.]

Strategy #5: Overhaul SVT’s information systems so that they support secure, efficient, and accurate tracking of information about SVT’s work and its supporters.

Actions:

- a. Acquire and launch Locate (a new database for Stewardship & Land Protection).
- b. Completely “clean” and update SVT’s donor and constituent database (Raiser’s Edge [RE]).
- c. Assess alternatives for integrating data that is in Locate, RE, Constant Contact, and Google Contacts and develop a plan for eliminating/reducing redundancies.
- d. Migrate SVT’s image library to a new database.
- e. Conduct a thorough review of SVT’s technology systems once every three years and implement changes as needed.