

Sudbury Valley Trustees

# Strategic Plan

July 1, 2024 – June 30, 2029

## Our Mission

*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 achieves its mission through four interconnected and mutually reinforcing program strategies:

- We conserve land
- We take care of natural areas
- We provide people with opportunities to connect with nature and to act for conservation.
- We build community-centered conservation, fostering a deeper connection between people and nature.

**Diversity, equity, inclusion, justice, belonging, and accessibility are essential values, at the heart of SVT's mission.**

SVT wholeheartedly aims to ensure everyone feels welcome to enjoy nature and can reap the benefits of nature's services. We assert that all people have a right to clean water, fresh air, access to green spaces, and freedom from pollution. Everyone is entitled to feel a sense of belonging in natural spaces and to enjoy the many benefits of spending time in nature.

Recognizing that our board, staff, and supporters do not yet represent the full diversity of our communities, we acknowledge the necessity for change. We are committed to making focused and thoughtful outreach to welcome people of all races, ethnicities, immigrant statuses, socio-economic classes, gender identities, sexual orientations, and physical abilities to a mutually beneficial effort that will strengthen our organization, diversify our reach, and ensure access to nature for all people.

**This strategic plan aims to address the many challenges that SVT faces:**

- Development pressure continues to rise. 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.
- Protecting land is becoming increasingly complex. In the face of increased development pressures and rising real estate costs, the work of land protection requires additional time, partnerships, money, and expertise.
- First class stewardship of our properties and conservation restrictions is complex and resource intensive. To properly steward the lands we protect and provide a high quality visitor experience, we must apply best management practices and support our partners to do so as well. Caring for protected natural areas requires sophisticated intervention to combat threats such as non-native invasive species, disturbance by people, and climate change.

- SVT's membership base has declined in recent years. To protect more land and build a strong conservation movement in this region, SVT must inspire new and diverse people, and reinvigorate former supporters to take a stand for nature.

**At the same time, this plan seeks to take advantage of many opportunities to advance our mission:**

- Analysis shows that there is still very important land protection work to do. We have identified at least 45,000 acres of land that are not yet protected but provide critical habitat, important natural services, community connections or farmland.
- Convening partners is SVT's greatest strength. SVT is positioned to inform and unite conservation strategies throughout the region with our robust network of municipal and nonprofit organizations working to protect natural areas. If equipped with further tools and resources, our partners will become more effective and efficient and significantly increase our joint impact.
- People can and will be inspired to protect and care for nature. Through increased educational programming, innovative outreach strategies, and new marketing strategies, we can engage more supporters and empower more volunteers to protect and care for land.
- Our core supporters are loyal and active. 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 community and expand our impact.

**Given these challenges and opportunities, SVT aspires to achieve long-range conservation goals:**

- Protect an additional 45,000 acres through fee acquisition, purchase of conservation restrictions and direct assists of partner land protection projects.
- Through first-class stewardship, restore and maintain habitats that are important for wildlife and provide people with high quality opportunities to experience nature.
- SVT will build the capacity of our partners through our work with the Metrowest Conservation Alliance that will contribute to the protection of the 45,000 acres and support best management practices in land stewardship.
- As a welcoming and inclusive organization, we will engage more people in the act of conservation; we will increase our strong base of supporters and volunteers and this base will include a diversity of individuals and partners from all parts of the region.
- We will remain one of the best conservation organizations for which to work and volunteer and the makeup of our staff and volunteers will reflect the diversity of the communities we serve.

# Goals, Strategies and Impacts

## Goal 1: Maximize Land Protection Success throughout SVT's Service Region

*Land protection efforts will be focused on SVT's 2022 GIS Priority Analysis that identifies those lands that are top priorities for protection in terms of biodiversity protection and wildlife corridors, farmland protection, maintaining nature's services, and ensuring conservation that supports healthy communities.*

**Strategy #1: Prioritize our land protection efforts in towns with the higher priority land clusters as identified in the 2022 GIS Priority Analysis: Boxborough, Harvard, Littleton, Bolton, Boylston/Shrewsbury, Framingham (southeast), Hopkinton, Sherborn/Holliston, Marlborough, Upton/Grafton, Westford, and Westborough**

### DESIRED IMPACTS:

- SVT is recognized as a strong land protection partner in our 15 targeted communities, and SVT is participating actively in land protection transactions.
- At least 90% of lands identified in the "High Ridge" aggregation project are protected.
- One new aggregation project initiated
- Six town action plans completed and in-progress

### Actions:

- a. Develop a shared land protection vision across multiple communities.
- 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 municipalities.
- c. Complete the "High Ridge" aggregation project.
- d. Identify and initiate one additional aggregation project.

## Strategy #2: Grow SVT's land portfolio: Acquire fee properties and CRs

### DESIRED IMPACT:

- 90% of new SVT acquisitions are within the SVT "gold" priorities map (this represents the highest ranked parcels of land in the 2022 GIS Priority Analysis).
- 5 new fee properties acquired, including one flagship property, totaling 250 acres.
- 12 new CRs (approximately 700 acres total).
- 200 priority landowners personally engaged.

### Actions:

- a. Further refine SVT's land protection priorities with the 2022 GIS Priority Analysis and develop a landowner outreach plan:
  - i. Coordinate with local partners and municipalities.

- ii. Engage in direct outreach to 600 landowners through invitations to workshops or through direct mail that touts the economic, tax, and environmental benefits of conservation.
  - iii. Develop an outreach packet of educational materials about conservation.
  - iv. Identify community connections of priority landowners
  - v. Host educational workshops for landowners where experts will discuss conservation strategies, including legal and tax issues.
  - vi. Conduct individual meetings between SVT Land Protection Specialists and landowners who show an interest in conservation.
- b. Identify potential “flagship” properties across the watershed and develop and initiate an action plan for the acquisition of at least one such property.

**Strategy #3: Facilitate and strengthen the ability of local land trusts, municipalities, and other allies to protect vulnerable, high-priority lands in their communities.**

**DESIRED IMPACTS:**

- A full and active Metrowest Conservation Alliance (MCA) Advisory Committee
- At least three collaborative landscape-scale and/or multi-municipality projects completed; three additional initiated
- Five community-led projects completed (indirect or direct assist through MCA/SVT)
- Community leaders recognize the value of protecting and providing nature’s services through land conservation.

**Actions:**

- a. Coordinate and strengthen the Metrowest Conservation Alliance (MCA).
  - i. Fill vacancies on Advisory Committee and establish roles and responsibilities.
  - ii. Invite participation of Department of Conservation and Recreation (DCR), MassWildlife, MassAudubon, and Trustees.
  - iii. Lead strategic planning effort for the MCA: Identify goals and strategies for next 5 years.
  - iv. Continue to bring MCA members and partners together on a common vision for land protection and stewardship.
  - v. Expand and improve communications, trainings, and other resources that will help our allies protect land locally.
- b. For any interested communities, engage each individual community’s stakeholders/decision-makers (local land trusts and key municipal staff and committees) in meetings to:
  - i. Ensure that the stakeholders understand SVT’s mission and expertise.
  - ii. Identify land protection priorities in each community using the 2023 GIS Priority Analysis and incorporate community-based priorities.
  - iii. Understand local obstacles to, and opportunities for, land protection.
  - iv. Provide education around what a CR is, what a baseline report is, and what roles they play in conservation work.

- v. Identify the roles of each community player and SVT in achieving community land protection goals.
- c. Conduct community outreach to share the Massachusetts Land Conservation Trust's "Valuing Nature's Services" toolkit that describes the economic benefits of using land conservation as a way to protect nature's services in a community.
- d. Through the MCA strategic planning process, determine if SVT should offer additional services to build the capacity for community land protection and to also determine what those services should be.
- e. Share the 2023 GIS Priority Analysis maps with local municipal planning staff and watershed groups and engage these stakeholders in discussions about how the maps may be used to inform planning that increases the pace of land conservation and protects land with important conservation values.

## **GOAL 2: Provide some access to land and nature to the full diversity of people and communities in our service area**

### **DESIRED IMPACTS:**

- Indigenous peoples have access to and feel welcome to use land for spiritual and cultural practices, including harvest, gathering, and ceremonial practices.
- Trusted relationships with local tribal groups and affiliated organizations that are directly engaged with native historic preservation and land rights.
- In an urban, environmental justice neighborhood: Parcel of land has been protected for outdoor space/natural area/farmland and is available to the community according to community needs.
- Farmland access secured for at least three members/families of historically underserved communities.

### **Strategies:**

- a. **Build relationships with these other constituencies and work to understand community needs.**
- b. **Build relationships with other organizations that serve minorities and other under-represented constituencies.**
- c. **Promote Indigenous access to land. Evaluate the potential of each land transaction to provide access to local indigenous peoples.**
- d. **Provide access to nature in an urban setting: Determine community needs to design the project.**

## **Goal 3: Provide excellent care for SVT's properties, and facilitate the delivery of improved stewardship at the region's other natural areas so that they:**

- Provide quality habitat for our region's wildlife.

- Provide all people with a high-quality opportunity to experience nature.
- Strengthen our region's ability to withstand and adapt to climate change.
- Provide sustainable land access to Indigenous people and to others who have been historically underserved by land conservation efforts

### **Strategy #1: Provide exemplary stewardship of SVT's properties**

#### **DESIRED IMPACT:**

- The Land Trust Alliance (LTA) Standards & Practices are met or exceeded.
- Effective management of stressors from climate change.
- All SVT properties are being managed to maximize ecological, scenic, and recreational values.
- At sites with high biodiversity value, inventories demonstrate improved or maintained high-biodiversity value (measured according to the goals in each property's plan).
- More diversity of people observed using SVT properties.
- Indigenous people have access to and make use of SVT land(s).

#### **Actions:**

- a. Maintain stewardship procedures for fee properties in accordance with LTA Standards & Practices
- b. Create new management plans for newly acquired fee properties and keep current all other plans. All SVT Land Management Plans will include a climate-resiliency component.
- c. Implement at least all moderate and high-priority action items outlined in management plans.
- d. Implement the high priority biodiversity projects (2023 revised priorities document).  
SVT's overall biodiversity goals are to protect the rare species and natural communities, high-quality representative communities, and the ecological functions of our service region.
- e. Engage volunteers in meaningful ways to 1) achieve our mission and stewardship excellence and 2) increase stewardship capacity and improve community engagement
- f. Mentor youth volunteers (teens and 20s) through participation in SVT stewardship activities.
- g. Reach out to and engage organizations not historically represented at SVT properties.
- h. 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 trail map (online or paper), and a well-maintained and marked trail system.
- i. Improve land access for all people and increase the diversity of users by removing barriers to finding and enjoying conservation properties. Conduct an accessibility audit of all SVT-managed lands and facilities to identify and address barriers to access.
- j. Develop and implement a plan to enhance physical accessibility, including but not limited to wheelchair-accessible trails, sensory gardens, and ADA-compliant facilities.
- k. Provide direct access for Indigenous peoples to their ancestral homelands and seek meaningful input from Indigenous peoples on land management.
- l. Continue to implement the Wolbach Farm Landscape Plan.
- m. Inventory SVT's land portfolio and identify properties to be developed as flagship sites. Make a significant investment in visitor experiences at two of those properties.

## **Strategy #2: Ensure the protection of conservation values on CRs**

### **DESIRED IMPACT:**

- Ten CR landowners implementing habitat- or recreation-management plans that maintain or improve conservation values.
- 90% response rate to communications from SVT staff.
- No major CR violations
- High-quality visitor experiences at publicly accessible CRs

### **Actions:**

- a. Maintain stewardship procedures for CRs in accordance with LTA Standards & Practices.
- b. Help landowners improve and maintain the conservation values of CRs. Provide management-planning support.
- c. Engage CR landowners through a variety of methods, distribute the CR landowner booklet to all CR landowners, and provide opportunities for CR landowners to participate in SVT events.

## **Strategy #3: Directly assist others to improve stewardship of high-priority habitats and recreational trails on high-value lands where there is a strategic advantage in providing that assistance.**

### **DESIRED IMPACT:**

- High-value non-SVT conservation lands meet the same Standards & Practices as SVT lands.
- Increased profile of SVT in community

### **Actions:**

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

## **Strategy #4: Strengthen the ability of established collaborations (the MCA and the SuAsCo Cooperative Invasive Species Management Area – CISMA) to advance the shared goal of providing excellent stewardship of the region's natural areas.**

### **DESIRED IMPACTS:**

- Communities that contain BioMap Forest Cores are pro-actively managing for forest health (have forest stewardship plans that include forestry for the birds; invasive plant and insect management; deer management. etc.).
- 90% of conservation land owners/land managers are knowledgeable about field-management techniques and are able to apply them for the benefit of field-associated wildlife.



- All 36 communities have established native pollinator habitat, and native pollinator planting sites have increased from 26 to 60.
- The number of Weed Warrior host organizations has increased from 12 to 20.

**Actions:**

- Continue to serve as the coordinator of both the MCA and the CISMA to sustain the collaborative partnerships.
  - Facilitate MCA strategic planning.
  - Expand and improve communications, trainings, and other resources that will help our allies protect and steward land locally.
  - Continue to bring members and partners together on a common vision for stewardship.
- Facilitate the development, adoption, and sharing of best practices.
- Provide informational resources and trainings on how to mitigate and address the consequences of climate change.
- Evaluate opportunities for collaborative stewardship initiatives, such as in field and forest management.

**Goal 4: Engage more communities and inspire more supporters in the conservation of the region's natural areas and farmland.**

**DESIRED IMPACTS:**

- Deep community connections,
- Accelerated fundraising, and
- Increased awareness of SVT's conservation impacts.

**Strategy #1: Enhance community engagement and foster a more diverse, equitable, and inclusive movement.**

**DESIRED IMPACTS:**

- Staff, board, supporters, and program participants reflect the demographics of the communities we serve.
- Increase general participation in programming and events by 25%.
- Increase family, children, and youth participation in programming and events by 50%.
- At least 5 community partners—such as other nonprofits, schools, youth groups, churches, and community centers—are engaged deeply and meaningfully with mutually beneficial joint programs.

**Actions:**

- Offer a wide range of inspiring, joyful, and educational community programming and events designed to foster a connection with nature and each other, while experimenting with innovative experiences.

- b. Collaborate creatively with community partners such as other nonprofits, schools, youth groups, churches, and community centers, especially with a genuine focus on listening to racially and ethnically diverse communities, embracing learning opportunities, and working equitably together.
- c. Empower volunteers to contribute meaningfully and more deeply to our cause and to build fellowship with each other.
- d. Expand programs for children and youth to inspire the next generation of conservationists.

**Strategy #2: Change our donor engagement model from a membership model to a supporter model.**

**Desired Impacts:**

- Individual supporters become inspired to give more according to their means, rather than an obligation to continue the same level of support. This should increase overall individual giving.
- Enhance the focus on our mission. Direct more communication toward the impact of donations and less on membership logistics, helping donors feel more directly connected to the work their money supports.
- Encourage spontaneous giving. Make it easier for supporters to contribute as they are motivated to do so, especially in response to urgent appeals or specific projects, which can boost overall fundraising.
- Simplify the donation process by removing the complexities associated with membership and benefits, we will provide donors with a better understanding of how their contributions are used and the direct impact they have on our cause. This transparency can enhance trust and engagement from our supporters.
- Enable individuals from all financial backgrounds to participate by removing the upfront cost of membership fees, ensuring that anyone motivated by our cause can participate in free programming and contribute according to their means.
- Reduce the administrative burden by eliminating the need to manage membership benefits, which are not central to our cause, so we may focus our resources on creating impactful fundraising campaigns.
- Improve donor retention. Build longer-lasting relationships based on donors' commitment to the cause rather than on the perks of membership, potentially increasing repeat donations.

**Actions:**

- a. Improve content of appeals and other communications. Experiment with increasing the number and frequency of donation appeals to deeply engage segments of supporters.
- b. Send renewal notices exclusively to individuals who have not contributed within the past year, or are at risk of lapsing. Eliminate standard annual membership renewal notices.
- c. Provide free access to programs for all when possible. When a program has a fee, the fee will be the same for current supporters and the general public.
- d. Include a donation request at the time of registration for programs and in the walk leaders' introductory remarks.
- e. Explore and resolve implications related to governance and the annual meeting vote for board of directors.

### **Strategy #3: Expand and accelerate financial support for the organization.**

#### **Desired Impacts:**

- Major donor support increased by 40%
- Donor supporter base has increased by 20%.
- Annual Fund Revenue has increased by 40%
- Foundation support increased by 100%;
- Corporate support increased by 10X
- Documented planned gifts increased by 20%, and

#### **Actions:**

- a. Inspire new donors to join our conservation movement by investing resources in new communities.
- b. Deepen our relationships with existing major donors through personalized engagement strategies, exclusive updates, and opportunities to see firsthand the impact of their support.
- c. Top 250 major donors and major donor prospects receive regular “insider” updates.
- d. Cultivate planned gifts from key, dedicated supporters.
- e. Expand foundation fundraising by increasing the quality and quantity of grant applications.
- f. Top 250 planned giving prospects receive regular touches throughout the year, including customized print mailings and in-person visits, as appropriate.
- g. Engage corporate sponsors with a focus on companies headquartered in our service area.

### **Strategy #4: Revitalize our brand identity and communication strategies, significantly increasing awareness of our conservation efforts and highlighting the organization as a key conservation leader across the region.**

#### **Desired Impacts:**

- The name of the organization reflects the diversity of our work and does not create a barrier to building community.
- The organization has a fresh, modern, strong, and clear brand identity and increased brand awareness in the communities we serve.
- Marketing materials serve and communicate with all people inclusive of race, ethnicity, immigrant status, socio-economic class, gender identity, sexual orientation, and ability.

#### **Actions:**

- a. Create a brand that highlights our strong championship of the natural world and our service to the community.
- b. Partner with a reputable marketing and branding firm that specializes in non-profit organizations to develop a comprehensive re-branding strategy.
- c. Initiate an exhaustive research phase to evaluate the potential for renaming the organization. This will involve stakeholder surveys, focus groups, and market analysis to understand the impact of our current name and the opportunities a new name could present. The goal is to

- ensure that our name accurately reflects our mission, resonates with our audience, and distinguishes us in the conservation field.
- d. Critically review our marketing materials to ensure our branding is modern, compelling, inclusive and cohesive across all platforms and materials and that our branding effectively communicates our values and mission to a diverse audience.
- e. Refine our communication approach to ensure we are engaging with our key audiences in the most effective manner, including analyzing communications channels, frequency, and content.
- f. Develop a comprehensive communication plan that includes translation services and materials in accessible formats (e.g., Braille, large print).
- g. Train staff on best practices for inclusive communications, including the use of clear, jargon-free language.

**Strategy #5: Investigate and develop a plan to diversify revenue streams to grow and stabilize the organization.**

Desired Impact

- Increased revenue from sources beyond direct donations, planned gifts, foundations, and corporate partnerships.

Actions:

- a. Study the feasibility of using the Wolbach barn as a rental property for paid community events, such as weddings, celebrations, and meetings. If such use is deemed feasible, implement a development and rental plan.
- b. Study the feasibility of initiating a conservation destination travel program for donors. If such a program is deemed feasible, plan and conduct at least one such trip as a pilot program.
- c. Seek additional creative funding sources.

**Goal 5: Strengthen SVT's financial and organizational capacity to protect and care for our region's natural areas – today and in perpetuity.**

**Strategy #1: Ensure that SVT is one of the best conservation organizations for which to work and volunteer.**

Desired Impacts

- The organization is welcoming and inclusive.
- The organization retains high-quality staff.
- The organization offers excellent compensation packages.
- All staff members have clear workplans and understand how their work fits into the strategic plan.
- Volunteer pool becomes more diverse and volunteer engagement is increased by 20%.

Actions:

- a. Survey staff and volunteers annually 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 and benefit packages to ensure that we attract and retain the best staff possible. Work to address any pay equity or barrier to entry issues within the organization and industry.
- c. Strengthen our work planning and evaluation program to establish clear goals, foster collaboration, facilitate professional growth, and reward exceptional performance.
  - i. Implement quarterly informal assessments to review progress toward individual work plan goals and team priorities.
  - ii. Recognize successes. Foster a culture of meaningful appreciation and recognition so that staff and volunteers feel valued. Goals are for it to be - Inclusive, Missional aligned, Public, Authentic, Consistent, Timely, Fun, Uplifting, Leveraging external and internal stakeholders.
  - iii. Address any challenges by updating work plans, clarifying priorities, and assessing and adding necessary training such as one-on-one coaching and professional development.
- d. Continue to evaluate and adjust our human resources policies to ensure that they are fair, transparent and well-understood.

**Strategy #2: 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.**

Desired Impacts:

- Organization has a culture of trust, inclusivity, and recognition for all those who work to further its mission.
- Organization attracts and retains a diverse staff.
- Staff and volunteers from under-represented backgrounds are engaged with SVT.

Actions:

- a. Research and apply how to attract and engage a more diverse constituency.
- b. Recruit and retain staff and governing volunteers from varied and traditionally under-represented backgrounds.

**Strategy #3: Ensure long term financial strength of the organization**

Desired Impact:

- To provide a strong financial foundation for the organization to carry out its mission of protecting and preserving land.

Action Steps:

- a) Provide annual 5-year rolling projections showing the sources and uses of funds to demonstrate the organization's financial stability.

- b) Maintain the strength of the organization's investments following the organization's long-term investment policy.
- c) Assess the feasibility and sustainability of new initiatives, demonstrating a positive return on investment. New initiatives should align with the organization's mission.
- d) Develop and monitor metrics and dashboards aligned with strategic goals to help the organization stay adaptable, make informed decisions, and maintain financial health.
- e) Provide timely financial reporting following generally accepted accounting principles to the finance committee and Board to help the organization make informed decisions.

Definitions:

Membership Model: Donors become members of an organization, receiving specific benefits and a sense of community in exchange for their financial support, often structured into various tiers.

Supporter Model: Donors contribute financially to an organization without the expectation of tangible returns, motivated by belief in the cause and maintained through ongoing communication about the organization's impact.

Access: ability to approach or enter; ability to view and/or use and/or visit and/or enjoy land and nature.

Flagship: Properties that are large enough, interesting enough, parking, varied geography and easy access for the public and group outings.