

FINAL 10-2-09

Virginia Outdoors Foundation 2010-2013 Strategic Plan

Introduction

Mission

The mission of the Virginia Outdoors Foundation is to promote the preservation of open-space lands and encourage private gifts of money, securities, land or other property to preserve the natural, scenic, historic, open-space and recreational areas of the Commonwealth.

Strategic Planning Context

The Virginia Outdoors Foundation played the leading role in achieving Governor Kaine's 400,000 acre goal for land conservation, placing over 70% of the 400,000 acres under easement over the last four years. The foundation is committed to protecting as much valuable open space land as possible across the Commonwealth, but the recent dramatic growth in conservation activity throughout the state has pushed VOF's capacity to the limit. Over the next four years, it will be critical for VOF to maximize management efficiency and secure additional revenue to maintain its lead role in conserving new land and carry out its stewardship responsibilities.

Stewardship responsibilities are multiplying, as a result of the success of the easement acquisition program and the transfer of land already under easement to new owners. Current staff levels are inadequate to meet this growing need, especially in light of the strong ongoing interest from new landowners in placing their land under conservation easement. It is essential that VOF keep pace with long-term responsibilities for stewardship of the land placed in its trust at a time when these activities are receiving considerable national scrutiny.

Land conservation in Virginia is a partnership effort and VOF is committed to strengthening its working relationships with other state land conservation agencies, local governments and private land trusts. Collaboration among partners must be strengthened to achieve local, state and regional land conservation goals with the finite resources available.

Long-term vision

As part of the strategic planning process, the VOF Board developed the following long-term vision for the organization to guide current and future planning.

- VOF will be a model statewide program that is a national leader in land conservation.
- VOF will function primarily as a state agency, but it will retain the flexibility and agility provided by its public/private status.
- VOF will be strategic, using its conservation easements to complement publicly protected land and maximize public benefits on privately owned land.
- VOF will work with individual landowners to protect open space, valuable habitats and watersheds, and to provide public access and outdoor recreation opportunities where possible, while keeping working land in productive use.
- VOF will operate a model stewardship program that protects conservation values and includes monitoring, outreach and education for landowners/donors.

- Conservation easements and their management will continue to be the central focus for VOF, but limited land acquisition and other activities will play roles as well in carrying out the mission.
- VOF will have sustainable funding sources to support its work that will include additional state revenues and a mix of private support and earned income.
- VOF will work with a network of strong partners to help carry out its mission and will work to enhance the capacity of all of its public and private partners.

Four-Year Priorities

The plan includes the following strategic priorities:

- Secure financial sustainability for VOF.
- Work with landowners to maximize land protection, emphasizing lands with the greatest public value and benefits as determined by VOF and its partners.
- Provide quality stewardship of all lands placed under easement and owned by VOF.
- Raise public awareness of the importance of protecting valuable lands for future generations and VOF's role in accomplishing this.
- Strengthen all aspects of organizational functioning to increase efficiency and employee satisfaction.

The plan is organized into five sections:

- Land Conservation
- Land Stewardship
- Outreach and Communications
- Financial Sustainability
- Organizational Development

It contains goals, priorities and activities in each of these five areas and assigns responsibility and, where appropriate, benchmarks for implementing the plan. All sections of the plan are important and inter-related, but high priority must be given to achieving financial sustainability because this is critical to the long-term success and integrity of the organization in all aspects of its work.

I. Land Conservation

GOALS:

- Play a lead role in meeting state land conservation goals.
- Maximize public benefits from land placed under conservation easements while keeping agricultural and forestal land in productive use.
- Diversify land conservation activities when appropriate to meet Commonwealth and VOF goals.

4-Year Priorities	4-Year Activities	Responsibility	Timeframe
A. Maximize the amount of new land placed under VOF easements in ways that provide the greatest public benefit.	1. Invite local and regional land trusts to recommend Special Project Areas in their regions for consideration in setting VOF easement processing priorities.	VOF in collaboration with VaULT	January 2010
	2. Develop a methodology for evaluating projects based on acreage, conservation attributes, state, regional and local conservation priorities, and the degree of protection provided.	Easement staff, Executive Director and Board	January 2010
	3. Prioritize easements to bring before the Board based on this methodology.	Easement staff	2010, 2011, 2012, 2013
	4. Strive to hold at least one easement in every county in the state by 2012 to reinforce the statewide nature of VOF's work.	Executive Director, Communications and Outreach Manager and Easement staff	2010, 2011, 2012, 2013
	5. Work with Virginia cities to identify permanent natural and cultural open space opportunities and seek to add easements in at least one new Virginia city every calendar year.	Executive Director, Communications and Outreach Manager and Easement staff	2010, 2011, 2012, 2013

	6. Negotiate all easements consistently to maximize conservation benefits and facilitate stewardship while respecting the needs of donors.	Easement staff in collaboration with Stewardship staff	2010, 2011, 2012, 2013
B. Coordinate with other state agencies to identify local, regional and state land conservation priorities and work with these partners to maximize efficiency and effectiveness in conserving priority lands.	1. Work with partners to review and integrate existing conservation land databases and historical planning documents to identify areas where VOF and others should give priority to new conservation projects.	VOF, DCR, VaULT and other partners with a consultant if needed	as soon as possible
	2. Incorporate these priorities into VOF's easement evaluation process as soon as they become available.	Easement staff	as soon as possible
	3. Collaborate with DCR's Office of Land Protection and other partners to refer potential easements to the most appropriate holder.	VOF, state land conservation agencies and other partners	2010, 2011, 2012, 2013
C. Pursue land donations and acquisition opportunities that serve Commonwealth and VOF goals, including new conservation lands and trade lands.	1. Adopt clear policies for when VOF will consider accepting gifts of land or funds for acquisition.	Board and staff	June 2010
	2. Evaluate acquisition opportunities when they arise based on adopted policies and criteria.	Board and staff	2010, 2011, 2012, 2013
	3. Pursue opportunities for receipt of trade lands, life estates and other gifts that could provide financial support for VOF and its mission.	Board and staff	2010, 2011, 2012, 2013

D. Build staff capacity to meet landowner demand for easement donations that meet VOF guidelines and established priorities.	1. Periodically evaluate and reallocate easement staff county assignments to respond most efficiently to the demand for new easement donations.	Deputy Directors for Easements	2010, 2011, 2012, 2013
	2. Continue pilot program for volunteers and evaluate opportunities to use them in responding to new easement requests.	Easement staff and Stewardship staff	2010, 2011, 2012, 2013
	3. Expand staff to respond to landowner interest in easement donations, especially in priority areas.	Board and Executive Director	as soon as funding allows

II. Land Stewardship

GOALS:

- Ensure consistent, effective and sustainable stewardship of VOF easements.
- Provide exemplary management of all VOF owned properties.
- Maintain positive relationships with VOF easement landowners.

4-Year Priorities	4-Year Activities	Responsibility	Timeframe
A. Develop and implement a comprehensive stewardship program for all VOF easements.	1. Develop a methodology and criteria for determining monitoring frequency based on property characteristics.	Stewardship staff, Executive Director and Board	April 2010
	2. Develop an internal process to guide VOF's response to landowner requests and complaints in a timely, professional and consistent manner.	Executive Director and Stewardship staff	June 2010
	3. Conduct regular monitoring visits for all VOF easements consistent with the methodology and criteria.	Stewardship staff	2010, 2011, 2012, 2013
	4. Explore the use of aerial photography and other technologies to enhance monitoring and reduce costs.	Stewardship staff	end of 2010
	5. Develop a system to contact new VOF landowners within one year of easement recordation and provide information on VOF.	Stewardship Staff and Communications and Outreach Manager	2010
	6. Operate a pro-active enforcement program that includes regular monitoring, landowner outreach, and enhanced relationships with local governments to anticipate problems before they arise.	Stewardship and Legal staff	2010, 2011, 2012, 2013

B. Develop and implement an effective landowner relations program.	<ol style="list-style-type: none"> 1. Develop stewardship outreach materials for newsletters, brochures and handouts. 2. Coordinate with partners to participate in at least one education workshop per year on topics like wildlife corridors and special bird areas. 3. Inform easement landowners about other state/local, non-profit programs and events related to responsible stewardship. 	<p>Stewardship staff and Communications and Outreach Manager</p> <p>Stewardship staff and Communication and Outreach Manager with partners</p> <p>Communications and Outreach Manager and Stewardship staff</p>	<p>2010, 2011, 2013, 2014</p> <p>2010, 2011, 2012, 2013</p> <p>2010, 2011, 2012, 2013</p>
C. Serve as a model steward of VOF owned land.	<ol style="list-style-type: none"> 1. Develop a plan for monitoring and maintaining VOF owned lands on a regular basis. 2. Implement the monitoring and maintenance plans. 3. Develop one additional management plan for a VOF owned property per year and implement management plans as resources allow. 	<p>Stewardship staff, Executive Director and Board</p> <p>Stewardship staff</p> <p>Stewardship staff and Easement staff</p>	<p>January 2010</p> <p>2010, 2011, 2012, 2013</p> <p>2010, 2011, 2012, 2013</p>
D. Develop a sustainable stewardship program that will provide adequate staff capacity to accommodate growing stewardship demands.	<ol style="list-style-type: none"> 1. Continue pilot program to use volunteers to enhance VOF's stewardship capacity and evaluate and revise the program as needed. 2. Periodically evaluate and re-allocate staff assignments to respond most efficiently to stewardship needs and demands. 3. Increase stewardship staff to maintain the ability to effectively manage VOF easements and owned property. 	<p>Stewardship staff and VaULT</p> <p>Stewardship Deputy Director</p> <p>Executive Director and Board</p>	<p>2010, 2011, 2012, 2013</p> <p>2010, 2011, 2012, 2013</p> <p>as soon as funding allows</p>

III. Outreach and Communications

GOALS:

- **Build increased understanding of and appreciation for VOF’s goals and contributions to land conservation in the Commonwealth.**
- **Enhance the capacity and effectiveness of the state’s private land trust community.**
- **Build strong working partnerships with other state land conservation agencies to advance state goals.**
- **Build strong working partnerships with local governments, regional planning bodies, and other public and private partners crucial to achieving state land conservation goals.**

4-Year Priorities	4-Year Activities	Responsibility	Timeframe
A. Increase visibility for VOF goals and accomplishments and for the value of land conservation in the Commonwealth.	1. Continue to have the Executive Director attend legislative committee meetings, brief legislators, and serve as the face of VOF in the legislature.	Executive Director	2010, 2011, 2012, 2013
	2. Track bills of interest during the legislative session and attend committee meetings as appropriate.	Legal staff	2010, 2011, 2012, 2013
	3. Create fact sheets and talking points about VOF’s accomplishments and the importance of land conservation that can be presented to members of the General Assembly and others to encourage support for VOF’s work.	Communications and Outreach Manager	2010, 2011, 2012, 2013
	4. Analyze conservation values of VOF conserved lands and transform this information into talking points and reports to be used in presentations, news releases, newsletters, fundraising appeals and on the website.	Communications and Outreach Manager and GIS staff	2010, 2011, 2012, 2013

	5. Identify target audiences and use the website, quarterly newsletter, event displays, presentations, brochures and other avenues to reach these target audiences.	Communications and Outreach Manager with input from staff and Board	2010, 2011, 2012, 2013
	6. Produce and distribute press releases about projects that highlight VOF's work.	Communications and Outreach Manager and staff	2010, 2011, 2012, 2013
B. Work with local and regional governmental entities to increase their understanding and involvement in land conservation activities.	1. Develop a presentation that shows local government officials how to establish easement donation programs, using existing county programs as models.	Communications and Outreach Manager, Easement staff, Stewardship staff	2010
	2. Share this presentation with local government officials at VACo and VML and in individual counties where easement demand is highest to get more localities to develop such programs.	Executive Director in collaboration with DCR Land Use Coordinator	2010, 2011, 2012, 2014
	3. Collaborate with partners to produce articles about easement donation programs and purchase of development rights programs for VML and VACo publications.	Communications and Outreach Manager in collaboration with DCR Land Conservation Coordinator and VDACS Office of Agricultural Preservation	2010, 2011, 2012, 2013
C. Partner with other public and private organizations to enhance land conservation activities in Virginia.	1. Work with partners to develop educational sessions for VaULT conferences and other tools to increase easement capacity and expertise in private non-profit organizations.	Communications and Outreach Manager in partnership with DCR Land Conservation Coordinator and VaULT	2010, 2011, 2012, 2013
	2. Attend meetings of key partner agencies and organizations to stay up to date on their activities, share what VOF is doing, and look for ways to enhance collaboration.	Communications and Outreach Manager and Executive Director, individual Board members, and other staff as appropriate	2010, 2011, 2012, 2013

IV. Financial Sustainability

GOALS:

- Achieve near-term budget goals in a challenging economy.
- Provide sound fiscal management of the organization.
- Secure sustainable long-term funding from a variety of public and private sources.
- Preserve and rebuild the easement defense fund.

4-Year Priorities	4-Year Activities	Responsibility	Timeframe
A. Secure adequate funds to allow VOF to operate at current levels through the current economic downturn.	1. Create a 2011-2012 base budget that strives to maintain current VOF activities and services.	Executive Director, Financial Manager, Deputy Directors and Board	2010
	2. Seek legislative action to increase the amount of funding VOF receives from the recordation fee, including expansion to all jurisdictions.	Board and staff in collaboration with DCR, VaULT and other key partners.	2010
	3. Initiate a private fundraising plan to help close the revenue/expense gap.	Executive Director, Development Assistant and Board	2010
	4. Make every effort to conserve as much of the easement defense fund as possible.	Executive Director and Board	2010
	5. Explore the benefits and liabilities of service fee structures to support easement and stewardship activities.	Executive Director, Deputy Directors for Easements and Stewardship, and Board	2010
B. Provide sound fiscal management of the organization.	1. Create annual balanced budgets using a combination of state and private resources.	Executive Director and Board	2011, 2012, 2013

	2. Continue to minimize withdrawals from VOF's easement defense fund and rebuild this fund as soon as possible.	Executive Director and Board	2010, 2011, 2012, 2013
C. Secure sustainable long-term funding for VOF from a variety of sources.	1. Seek additional state appropriations to meet the exponential growth in VOF's stewardship responsibilities and growing landowner interest in placing land under easement.	Executive Director, Board and other staff as appropriate	2010, 2011, 2012, 2013
	2. Seek increases in other forms of state funding that do not require annual appropriations.	Executive Director, Board and other staff as appropriate	2010, 2011, 2012, 2013
	3. Develop and implement a private fundraising strategy that can produce 10% of VOF's budget annually.	Executive Director, Development staff and Board	2010, 2011, 2012, 2013

V. Organizational Development

GOALS:

- Provide strong leadership that sets clear policies and priorities and maintains sound fiscal oversight.
- Ensure effective communication and collaboration across offices and Divisions within VOF.
- Maintain VOF's quality staff and achieve high levels of employee retention and satisfaction.
- Make effective use of technology to increase the quality and efficiency of all VOF work.

4-Year Priorities	4-Year Activities	Responsibility	Timeframe
A. Set clear goals and priorities for the next four years and provide effective management oversight.	1. Adopt a four-year strategic plan.	Board	2010
	2. Develop annual workplans with clear and measurable objectives based on the priorities set forth in the strategic plan and revisit the plan annually to assess progress.	Executive Director, managers and staff	January 2010, 2011, 2012, 2013
	3. Set performance measures at the Division level that will enable employees and the Division to contribute to the realization of strategic goals.	Executive Director and Division managers	February 2010, 2011, 2012, 2013
	4. Maintain clear policy and procedure guidance for decision-making within the organization and ensure consistent application of these throughout the organization.	Board and Executive Director	2010, 2011, 2012, 2013
	5. Identify strategies that will strengthen channels of communication to allow the entire organization to understand the opportunities and challenges confronting the organization.	Executive Director and Human Resource Manager	Develop strategy by January 2010 and implement in 2010, 2011, 2012, 2013
	6. Hold monthly leadership team meetings to ensure coordinated management and oversight.	Executive Director and designated leadership team	2010, 2011, 2012, 2013

<p>B. Strengthen central management systems to support high performance.</p>	<ol style="list-style-type: none"> 1. Create detailed annual line-item budgets that enable costs to be linked to performance goals. 2. Review human resource policies, benefit plans and compensation packages on an annual basis to ensure they are fair and financially responsible. 3. Establish a finance manual that clearly outlines financial/procurement policies and procedures for the entire organization. 4. Develop a detailed information technology strategic plan that outlines steps and priorities for developing future databases and applications. 5. Create an integrated database that includes landowner information, property characteristics, and special data to use for fundraising, outreach, stewardship and data analysis based on the IT strategic plan. 6. Provide technical training and support to allow all staff to make maximal use of technology, including the integrated database when available. 	<p>Financial Manager and Executive Director</p> <p>Human Resource Manager, Executive Director and Board</p> <p>Financial Manager, Executive Director and Board</p> <p>Technology Manager, Easement and Stewardship Deputy Directors, appropriate public and private partners and outside contractors as needed</p> <p>Technology Manager, appropriate public and private partners and outside contractors as needed.</p> <p>Technology Manager & GIS Team</p>	<p>March 2010, 2011, 2012, 2013</p> <p>2010, 2011, 2012, 2013</p> <p>July 2010</p> <p>as soon as funding allows</p> <p>as soon as funding allows</p> <p>2010, 2011, 2012, 2013</p>
<p>C. Enhance employee satisfaction and retention.</p>	<ol style="list-style-type: none"> 1. Establish annual training and development goals for staff and a training budget to support this. 2. Provide employees opportunities for career advancement within the organization when possible. 	<p>Executive Director and managers</p> <p>Executive Director and Deputy Directors</p>	<p>March 2010, 2011, 2012, 2013</p> <p>2010, 2011, 2012, 2013</p>

	<p>3. Set annual performance goals for employees and have employee reviews to assess progress.</p> <p>4. Continue the Employee Recognition program and look for additional ways to reward exceptional performance.</p>	<p>Executive Director, managers and Board</p> <p>Human Resource Manager, Executive Director and Deputy Directors</p>	<p>January 2010, 2011, 2012, 2013</p> <p>2010, 2011, 2012, 2013</p>
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