

# **PALMER LAND TRUST AT ITS FORTY YEAR ANNIVERSARY**

## **STRATEGIC PLAN 2020**

*Updated April 2018*



# VISION

A COMMUNITY UNITED  
AROUND LAND AS ESSENTIAL  
TO OUR IDENTITY, ECONOMY,  
AND QUALITY OF LIFE

# MISSION

TO PROTECT SOUTHERN  
COLORADO'S LANDS FOR  
PRESENT AND FUTURE  
GENERATIONS

## 3 FOCUS AREAS



## 4 GOALS



### LAND

To champion a region characterized by ample outdoor recreation opportunities, robust agricultural communities, and inspiring scenic vistas.



### COMMUNITY

To elevate the importance of land as part of our regional identity, and land conservation as a priority for maintaining a high quality of life and a vibrant economy.



### FINANCIAL RESPONSIBILITY

To develop the financial resources and financial stability to fulfill our goals and objectives.



### GOVERNANCE & MANAGEMENT

To be led by a committed and dynamic group of individuals who work within an internal structure that ensures excellence, commitment, and responsibility.

# Introduction & Context

*“Never let a good crisis go to waste.”* – original attribution disputed, some say Winston Churchill

Land conservation in Colorado and the United States is in crisis. With the value of federal public lands questioned like never before, and the unprecedented reversal of numerous national monument designations, land protection is suddenly on the radar of national news coverage. In Colorado, private and public land conservation has slowed drastically in recent years due to a lack of administrative support at the state level, the complexity of transactions steadily increasing, and shortcomings with the traditional transaction process, such as valuation practices.

At all levels of government, funding for land conservation has been a long-time challenge. Looking at southern Colorado, the Colorado Springs Parks Department survives on less than half the average budget of comparable parks departments elsewhere in Colorado. El Paso County operates on just over \$2 per citizen, per year, when the average is \$7 per citizen for other Front Range counties. The US Forest Service, charged with managing the majority of our amazing backdrop and regional views, has seen its maintenance budget continually slashed and more and more of its funding used for combating wildfires.

It is times of uncertainty and doubt that reveal opportunity and the necessity of innovation. As a voice for the public, land trusts are emerging as our most effective tool for critical land conservation today. It is clear that the front lines of land conservation will not be fought through government entities, but rather through land conservation organizations. Where local, state, and federal agencies are unable to catalyze significant land protection, land conservancies can. As nimble, effective entities that represent the voice of public will, we are uniquely poised to tackle community priorities and achieve results where others have failed.

Through tools we currently have, or need to invent, we can leverage private philanthropy and public funding to accomplish timely projects in the face of immense challenge. As we look to the future we are inspired to think BIG. We must push ourselves to proactively conserve that which we hold most dear – the land. It is our hope that future generations will have the opportunity to get lost amid the ponderosa pines on a trail just minutes from Colorado Springs, where the crunch of leaves under their boots and the crisp smell of mountain air provides a sense of calm and a sense of place that leaves them in awe, wonder, and peace. Or where local food, grown in the lower Arkansas Valley, is abundant. This plan outlines our goals to think big in this time of crisis, to capitalize on the incredible opportunities that inevitably accompany challenge, and to ensure that southern Colorado maintains the quality of life that defines our region.

<b>Why</b>	We believe in a strong, vibrant, and united community
<b>How</b>	By being a champion of our region and exhibiting leadership through excellence and innovation
<b>What</b>	We conserve and steward land and water

## Vision

A community united around land as essential to our identity, economy, and quality of life.

## Mission

To protect southern Colorado's lands for present and future generations.

## Core Values

**Authenticity** in representing the communities of southern Colorado.

**Integrity** in our actions as responsible, caring, and trustworthy partners and advocates.

**Championship** of land conservation within the increasing pressures of population growth and development in southern Colorado.

**Innovation** and vision in our programs and partnerships.

## 4-Year Strategic Imperatives

- Enhance outdoor recreation
- Maintain robust working farms and ranches
- Protect inspiring scenic vistas

# GOAL 1: LAND

**To champion a region characterized by ample outdoor recreation opportunities, robust agricultural communities, and inspiring scenic vistas.**

*Strategic Priorities:*

1. Protect a critical mass of working, irrigated farmland to ensure the viability and sustainability of agricultural communities of the Arkansas River Valley

*We will be successful if we:*

- Increase the amount of permanent farmland conservation in the Arkansas Valley
- Create a conservation framework that can achieve a scale of critical mass
- Establish trust and goodwill with focus farming communities
- Enhance local connection to regional food and the interconnectedness of our region's communities

2. Ensure that opportunities for expanding public open spaces are realized by doing what we can to facilitate and advance tangible and viable projects, and lend our support and expertise to initiatives that further this objective.

*We will be successful if we:*

- Spearhead a vision for the Pikes Peak region
- Add an average of one new public open space per year within El Paso or Teller counties
- Achieve permanent conservation protection of open spaces not permanently conserved
- Advance public open space throughout our region in partnership with communities

3. Maintain the natural character, identity, ecological integrity, and quality of life of our region through the conservation of working ranches, projects that contribute to landscape-scale conservation, and other strategic projects or partnerships that further conservation.

*We will be successful if we:*

- Increase the amount of conserved land in our region
- Form strategic alliances with partners to achieve greater scale, pace, and impact
- Cultivate strategic alliances with business, development, and municipal interests to include conservation into planning discussions
- Complete projects that "fill the gaps" and contribute to existing conserved acreage

4. Ensure that our stewardship program is characterized by excellence, technological innovation, and efficiency.

*We will be successful if we:*

- Maintain a low number of conservation violation occurrences
- Achieve a 100% success rate in conservation defense cases
- Operate within a risk management plan
- Achieve increases in program efficiency

## GOAL 2: COMMUNITY

To elevate the importance of land as part of our regional identity, and land conservation as a priority for maintaining a high quality of life and a vibrant economy.

*Strategic Priorities:*

1. Build a network of land conservation advocates that provides vocal and financial support for permanent land protection in southern Colorado.

*We will be successful if we:*

- Develop a community engagement initiative rooted in a comprehensive communications framework
  - Create a strong business partnership program
  - Launch and cultivate a robust and ever-expanding monthly giving program
  - Increase the number of donors at least 10% year over year
  - Advance an urgent conservation initiative (e.g., parks funding) within our community that addresses some of the challenges that conservation faces in our city and county
2. Participate in public policy initiatives that maintain or strengthen land conservation at the local, state, and federal levels.

*We will be successful if we:*

- Defend state and federal tax incentives for conservation
  - Expand funding for land conservation at the local, state, and federal levels
  - Advance industry changes within Colorado that enhance conservation for the future
3. Enhance awareness and understanding of the role land conservation plays in a high quality of life.

*We will be successful if we:*

- Advance a flagship, signature project that highlights the intersections between land conservation, a healthy community, and a vibrant economy
- Engage the community in an active land conservation project through fundraising, volunteering, and other engagement avenues
- Grow the Southern Colorado Conservation Awards event 10% year over year

# GOAL 3: FINANCIAL RESPONSIBILITY

**To develop the financial resources and financial stability to advance land conservation priorities**

*Strategic Priorities:*

1. Create a budget that supports the successful execution of the strategic plan.

*We will be successful if we:*

- Diversify funding avenues
- Reduce reliance on uncertain revenue streams by augmenting project fees with increased unrestricted giving
- Operate annually under a comprehensive fundraising plan
- Build and consistently grow a major gifts program

2. Obtain the financial resources to complete land conservation goals.

*We will be successful if we:*

- Leverage funding from market-based frameworks and ecosystem services for land conservation and stewardship
- Explore project-based individual giving fundraising through a pilot project (e.g. Maytag Ranch or The Abbey in Fremont County)
- Establish organizational project cost data and project fees to better support the organization

3. Build a robust Stewardship Fund that will serve as a strong foundation to serve both the current needs and those of perpetuity.

*We will be successful if we:*

- Build a strong planned giving program
- Balance investment expenses with appropriate level of service
- Establish a Stewardship Fund fee policy that better supports the organization
- Utilize opportunities for closing the Stewardship Fund funding gap

# GOAL 4: GOVERNANCE & MANAGEMENT

**To be led by a committed and dynamic group of individuals who work within an internal structure that ensures excellence, commitment, and responsibility.**

*Strategic Priorities:*

1. We will strictly follow industry best practices and standards, and exceed or lead in innovating those practices where applicable.

*We will be successful if we:*

- Maintain accreditation status with the Land Trust Accreditation Commission and certification with the State of Colorado
  - Participate in initiatives (whether internal or through partnerships) that push our industry to improve or innovate how we do business
  - Share our expertise through leadership opportunities, speaking engagements, conference presentations, etc.
  - Exhibit leadership through actions, initiatives, and projects at both the regional and state levels that allows land conservation to operate from a position of strength, trust, and goodwill across the state
2. Provide a supportive work atmosphere, competitive salaries and benefits, and professional development and leadership opportunities to staff in order to attract and retain excellent employees.

*We will be successful if we:*

- Strive for turnover rate of <10%
  - Grow salaries to “above average” based on benchmark compensation reviews
  - Exceed standards for employee benefits
  - Provide financial support for leadership development opportunities for all staff (based on a plan created by the ED)
3. The Board of Trustees will operate in a framework that enhances Trustee engagement, improves accountability, and builds Board leadership.

*We will be successful if we:*

- Create an appropriate committee and governance structure that supports the goals of the organization
- Have a board composition that supports the goals of the organization
- Exhibit high levels of trustee engagement, initiative, and self-education in serving the organization (e.g. attending conferences, hosting fundraising events, etc.)

# Strategic Challenges and Emerging Opportunities

This plan assumes eight major internal and external challenges for Palmer Land Trust over the next four years.

- 1. Creating advocates in local and state government.** Recent events within the Colorado Conservation Easement Tax Credit Program and local opportunities for conservation underscore the importance of our relationships with state and local government. It is incumbent on us to create champions within these governmental sectors who understand our work and the importance of what we do within the community. *Opportunity: Greater engagement with state and local government*
- 2. Sustaining funding for the Lower Arkansas Valley office.** FY2017 is the final year of a 4-year capacity building funding stream to open the Rocky Ford office. We need to explore and pursue how to sustain funding for the Lower Arkansas Valley office for FY2018 and beyond. *Opportunity: Deepen funder engagement in the LAV; cue up funder interest in innovative LAV projects*
- 3. Managing increasing stewardship demands and costs, such as violations.** We must remain proactive and forward-thinking in order to ensure that we control stewardship costs to the best of our abilities now and into the future. *Opportunity: Position Palmer for a successful future; streamline and economize the monitoring process; deeper analysis of actual costs and common violations*
- 4. Examining the financial position of the organization in the current financial landscape.** Multiple factors, such as a reduction in the amount of annual property transactions, diminishing grant sources, and a heavy reliance on a handful of major donors, underscore the importance of close scrutiny of our financial positioning. *Opportunity: Broaden and deepen donor base; capitalize on passive income opportunities; identify a sustainable and realistic stewardship fund goal from which we can launch a fundraising campaign*
- 5. Understanding the costs, demands and complexities of protecting public properties.** Public properties often require a disproportionate amount of staff time. This resource demand is endemic to the complicated nature of public property transactions. *Opportunity: Analysis and revision of fee structure; a more active management role; enhance our relationships with land managers; public education and outreach that will in turn yield greater reach in the community*
- 6. Creating a budget that ensures the successful execution of the strategic plan.** We need to ensure that our budget can support the successful implementation of the strategic plan. Ultimately, our budget must be created in such a way that it can evolve to meet the growing needs of the organization. *Opportunity: Build a strong financial foundation; not rely on a budget deficit to fund programs, but instead ensure that programs are sustainable*
- 7. Solving the challenges to conserving land and water in the Lower Arkansas Valley.** As we have learned over the last couple of years, tying water to the land in the Lower Arkansas Valley is a critical component to conserving irrigated farmland. In order to do this, we need to develop and utilize tools other than the traditional tools, such as conservation easements. *Opportunity: Broaden our array of conservation tools that we can apply to fulfill our mission*
- 8. Understanding and responding to external conservation needs such as orphan easements.** As a regional land trust with a strong financial position, we must examine our role and be prepared to respond to land conservation needs such as orphan easements and land trust consolidation. *Opportunity: A more comprehensive vision of the needs of the region and a potential consolidation of resources in order to meet those needs*

## APPENDIX

### Strategic Planning Process

In FY2015, senior staff and the Board decided to undertake a new strategic planning process a year earlier than originally planned. This was due to a number of factors, including the following: significant staff turnover including a leadership transition and subsequent hiring of new staff; the opening of a field office in Rocky Ford; new, unanticipated challenges in the Lower Arkansas Valley; pressures at the state level with the Colorado Conservation Easement Tax Credit program; and unplanned complexities that required greater resource allocation for public properties.

