

**STRATEGIC PLAN**  
**Santa Fe Conservation Trust**  
**2018-2021 (3 Years)**

**PURPOSE:**

For the next three years the Santa Fe Conservation Trust (SFCT) will focus on the six Goals and associated Objectives described below. Our aim is to move the SFCT to a higher level of performance and community service, and thus, achieve our Vision and Mission in land conservation and community engagement in Northern New Mexico.

**VISION:**

We envision a future where everyone in northern New Mexico cherishes nature and works to preserve it for this and future generations.

**MISSION:**

The Santa Fe Conservation Trust partners with our community to keep northern New Mexico's living lands and people flourishing together. We protect culturally and environmentally significant landscapes, ignite people's passion for nature and enable the continual regeneration of our healthy place.

**GOALS (focus areas for the next 3 years) :**

- 1. Expand Organizational Capacity**—to meet needs and challenges, and embrace opportunities,
- 2. Complete and Implement Strategic Conservation Plan**—to guide and leverage land conservation efforts in order to achieve landscape scale impacts, serve landowner needs and our Community,
- 3. Practice Community Conservation**—to support and expand programs to broader audiences and underserved communities, with the aim of increasing our impact in our service area of northern New Mexico, broadening the diversity of our constituents, and making sure our services are being delivered as equitably as possible.
- 4. Enhance Board and Staff Performance and Development**—to increase effectiveness, efficiency, and capacity to meet needs, and to be sure we are keeping equity, diversity and inclusion in mind in our hiring and recruiting practices. To ensure this, SFCT board will work on writing a value statement for the organization that addresses equity, diversity and inclusion.
- 5. Achieve Land Trust Alliance Re-Accreditation**—to ensure proper governance, fiscal management and legal standing, and strengthen conservation and other program outcomes, and
- 6. Update (rebrand) Our Image**—to increase SFCT visibility & Community awareness and support for our work.

**GOALS & OBJECTIVES:**

- 1. Expand Organizational Capacity**—to meet needs and challenges, and embrace opportunities:
  - A. Fundraising:
    1. Annual Fundraising Plan (*See Appendix A*)—to increase sustainable funding levels:
      - a) Outline current and proposed funding sources:
        - (1) Specific events—annual dinner, Banff, receptions, mailings, etc,
        - (2) Planned Giving Program—Develop and launch,
        - (3) Contracts—Trails program Contract with City of Santa Fe, others,
        - (4) Investments income considerations,
        - (5) Grants, and

(6) Individual donors

- b) Set timelines and income targets by source,
- c) Implement and/or continue fundraising activities as planned.

B. Board Engagement:

1. Board Training (*See Appendix B*):

- a) Reframe fundraising and identify roles,
- b) Involve all Board members in at least 2 of 5 steps in fundraising cycle,
- c) Secure Board pledges to: give, identify potential donors, and participate in cycle.

2. Optimize Database:

- a) Clean up donor and contact lists; add names from event lists, etc,
- b) Analyze lists to identify how they might be used to generate increased income,
- d) Develop fundraising strategies around patterns and ideas gleaned from data analysis,
- c) Coordinate Staff and Board efforts to implement strategies.

C. Strengthen/Build Relationships:

- 1. Plan to personalize Board and Staff outreach efforts,
- 2. Plan to personalize event invitations, thank you notes, letters, etc,
- 3. Develop marketing strategies/formulas that reach all potential audiences.

D. Organizational Management:

1. Staffing Needs:

- a) Address employee performance, clarify roles and responsibilities, and revise as needed,
- b) Evaluate staffing levels to determine best value-added use of any new hire,
- c) Continue Board support and involvement to determine how best to increase organizational capacity. Set timelines and benchmarks to assess progress,

2. Volunteer Management/Strategic Partners—Review practices to optimize use,

3. Board Members and Committees—Maintain, and improve where necessary, focus on stated goals and priorities to prevent Mission-drift.

**2. Complete and Implement Strategic Conservation Plan**—to guide and leverage land conservation efforts to achieve landscape scale impacts, serve landowner needs and our Community:

A. Refine and Finalize—clarify conservation priorities for the next 3 years and beyond,

B. Design and Implement Stakeholder Involvement Process—to obtain community input and feedback; modify draft plan as appropriate,

C. Develop Implementation Plan—with timeline, estimated budget, etc., for priority projects and programs,

D. Strategic Partnerships—Include potential strategic partners in plan development, review and implementation efforts (e.g., landowners, county, city, trail groups, etc., etc.),

E. Continue to steward and monitor all conservation easements with appropriate documentation,

- F. Achieve 100% compliance with conservation easement requirements with all landowners,
- G. Continue to promote public access where possible.

**3. Practice Community Conservation**—to support and expand programs to broader audiences and underserved communities with the aim of engaging more people and increasing our relevance in our Community: The Trails Program is an invaluable asset to the organization for Community Outreach. It offers SFCT the opportunity for more community recognition; reaches new and diverse audiences; brings in new donors to SFCT; provides tangible evidence of quality of life and economic impact of our work; connects SFCT to many community partners; generates stories for fundraising, etc.

- A. Community Engagement—Develop programs and outreach efforts for new audiences:
  - 1. Build partnerships with other organizations and community leaders to create mutually beneficial opportunities—e.g., Vámonos!
  - 2. Participate in local events—continue to engage at the Farmers’ Market, other venues, etc,
  - 3. Conduct stakeholder involvement and other focused efforts to stay abreast of constituent interests, needs and opportunities in our Community.
- B. Outreach to diverse audiences—expand outreach efforts, e.g., Passport To Trails and Vámonos!, to target underserved neighborhoods and populations,
- C. Continue to secure appropriate grants and contracts to help fund this effort—e.g., City of Santa Fe Trails Contract, etc.
- D. Work with the City’s Economic Development staff to quantify the economic impact of Santa Fe’s trail system, which will help SFCT in securing more funding for its work.
- E. Finalize the GUSTO implementation plan with community input and work to have the trails it suggests for linkages completed by 2021.

**4. Enhance Board and Staff Development**—to increase effectiveness, efficiency, and capacity to meet Strategic Plan goals:

- A. Reframe fundraising function to increase Board participation,
- B. Develop case statements/story lines/sound bites to focus Board and Staff efforts,
- C. Training—plan to assess needs and take advantage of opportunities. Encourage staff to embrace opportunities and learn new skills.
- D. Board Recruitment—target the talents and diversity needed to achieve these strategic goals. The Governance & Nominating Committee leads this effort with input and help from the full Board, with the aim of having a strong and diverse slate of candidates for the annual Board meeting in December each year.

**5. Achieve Land Trust Alliance (LTA) Re-Accreditation**—to ensure proper governance, fiscal

management and legal standing, and strengthen conservation and other program outcomes—by August 19, 2019:

- A. Create Accreditation Committee—include Committee Chairs when possible to focus on and act upon subject area requirements, documentation and deadlines,
- B. Share LTA Standards & Practices and LTA application and submission deadlines with Board and Staff,
- C. Distribute work and responsibilities via assignments to Committees and Staff,
- D. Develop internal timelines to accomplish tasks and complete required documentation, and complete application and submissions, in a proactive and timely manner to meet LTA deadlines (*See Appendix C*).

**6. Update (rebrand) Our Image**—to increase SFCT visibility, and Community awareness and support for our work:

- A. Develop a New Vision and Mission—Use the 2018 Board and Staff Retreat to begin this process,
- B. Develop a Strong Brand Strategy:
  - 1. Visual Updates—Develop a new SFCT logo and update colors, fonts, design and imagery,
  - 2. Messaging Updates—Design new Marketing & Communications Strategy tied to our other Goals; include written case statements, website design & copy, and other branding materials,
  - 3. Ensure the Stewart Udall legacy, Dale Ball’s and others’ contributions, and other aspects of our history remain prominent,
- C. Optimize database—update, analyze, and further develop ideas about how to use data strategically.

**IMPLEMENTATION:**

Each year an annual work plan will be developed to implement elements of the SFCT strategic plan to accomplish goals and objectives in a logical sequence. These annual work plans will be reflected in annual budget development, committee work, employee performance plans, and existing and new projects.

**Appendix:**

- A. Annual Fundraising Plan
- B. Board Fundraising Training Documents/Handouts
- C. Land Trust Alliance Re-Accreditation Application and Submission Deadlines

## SFCT Strategic Plan

### APPENDIX A—(DRAFT)

The Finance Committee approves the budget for each year. Leading up to this, staff looks at potential grant income, and estimates income from events, grants, individuals, the board, contracts and other sources.

Costs or increases are forecast for rent, health insurance, and other expenses with contracts that expire mid-year.

The Finance Committee assesses these estimates, checks for reality, makes suggestions and approves the budget for full board approval.

The Marketing Committee plays a key role in working to support existing fundraising effort and helping staff to design new approaches, programs, such as planned giving, etc. Marketing Committee also helps inspire and focus other board member efforts on specific campaigns, such as getting sponsorships for the annual event, Banff, etc.

To expand organizational capacity, SFCT must find new sources of income and the board plays a key role in identifying new funding sources, networking with new constituents, supporting the ED in outreach, and participating in fundraising.

The fundraising plan will consist of:

- a line item annual budget showing expected income and revenue by source.
- a spreadsheet showing timelines and income targets by source, where applicable, but especially for fundraising that can be scheduled, such as mid-year and end of the year appeals, events, and grants.
- New sources of income will be identified with suggestions for board participation on how to secure them.
- Timeline/overview for any specific fundraising campaign designed to be implemented in the fiscal year so the Board knows how to participate in it.

# **Philanthropy in America**

**2016: \$390 billion in private money was given to nonprofits. (Does not include government funding or earned income.)**

***Where did it come from?***

- **Foundations 15%**
- **Corporations 5%**
- **Individuals 72%**
- **Bequests 8%**

**More than half of this money came from middle class, working class, and poor people – in other words, people like you.**

- **68-70% of households contribute**
- **The typical household supports 5-10 organizations per year.**
- **The median amount contributed per household is \$1,300-\$2,000 per year.**

Sources: *Giving USA*, [www.givingusa.org](http://www.givingusa.org); *Grassroots Fundraising Journal*, [www.grassrootsfundraising.org](http://www.grassrootsfundraising.org), National Center for Charitable Statistics, [nccsdataweb.urban.org](http://nccsdataweb.urban.org).

# Income sources for nonprofits

## Grants

- \* Foundations
- \* Corporations
- \* Public charities
- \* Government
- \* Service clubs
- \* Faith-based

## Individuals

- \* Membership
- \* Major gifts
- \* Monthly giving
- \* Online giving/crowdfunding
- \* Benefit events
- \* Workplace giving
- \* Planned gifts

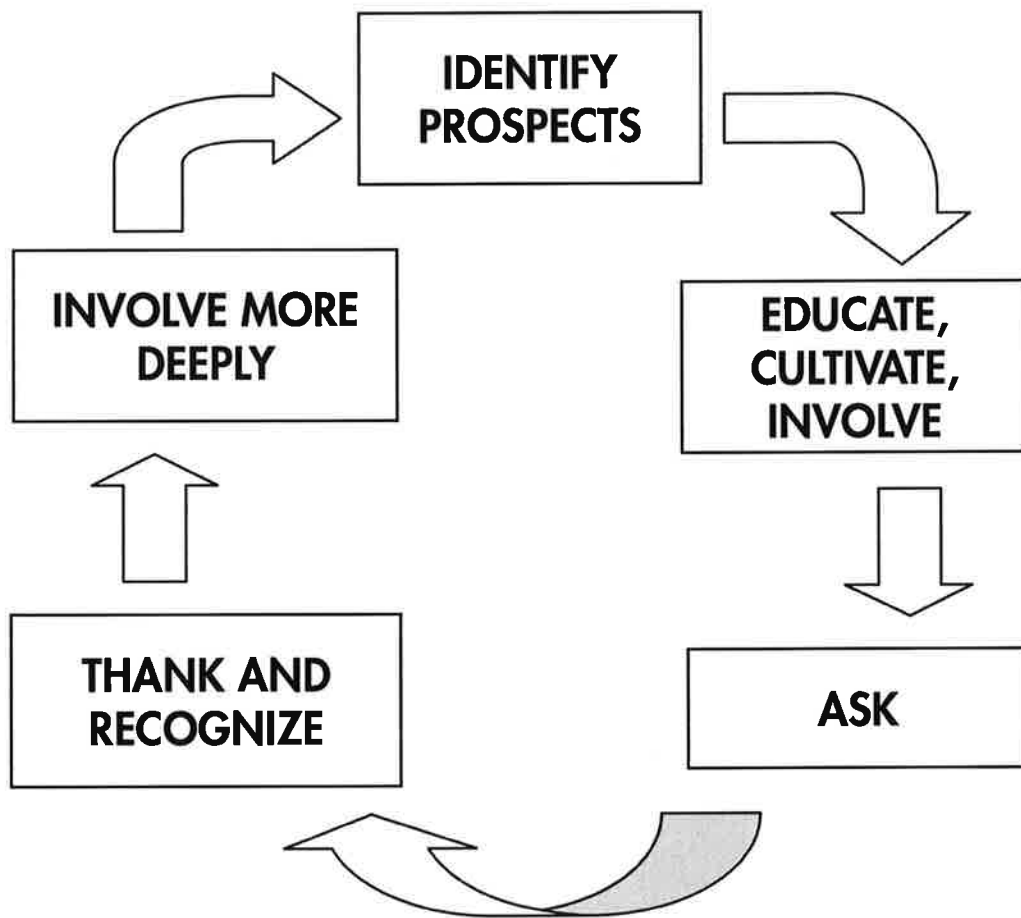
## Earned

- \* Goods
- \* Services
- \* Publications
- \* Investment income
- \* Cause-related marketing

Adapted from Andy Robinson, *Selling Social Change (Without Selling Out): Earned Income Strategies for Nonprofits*, Jossey-Bass, 2002.



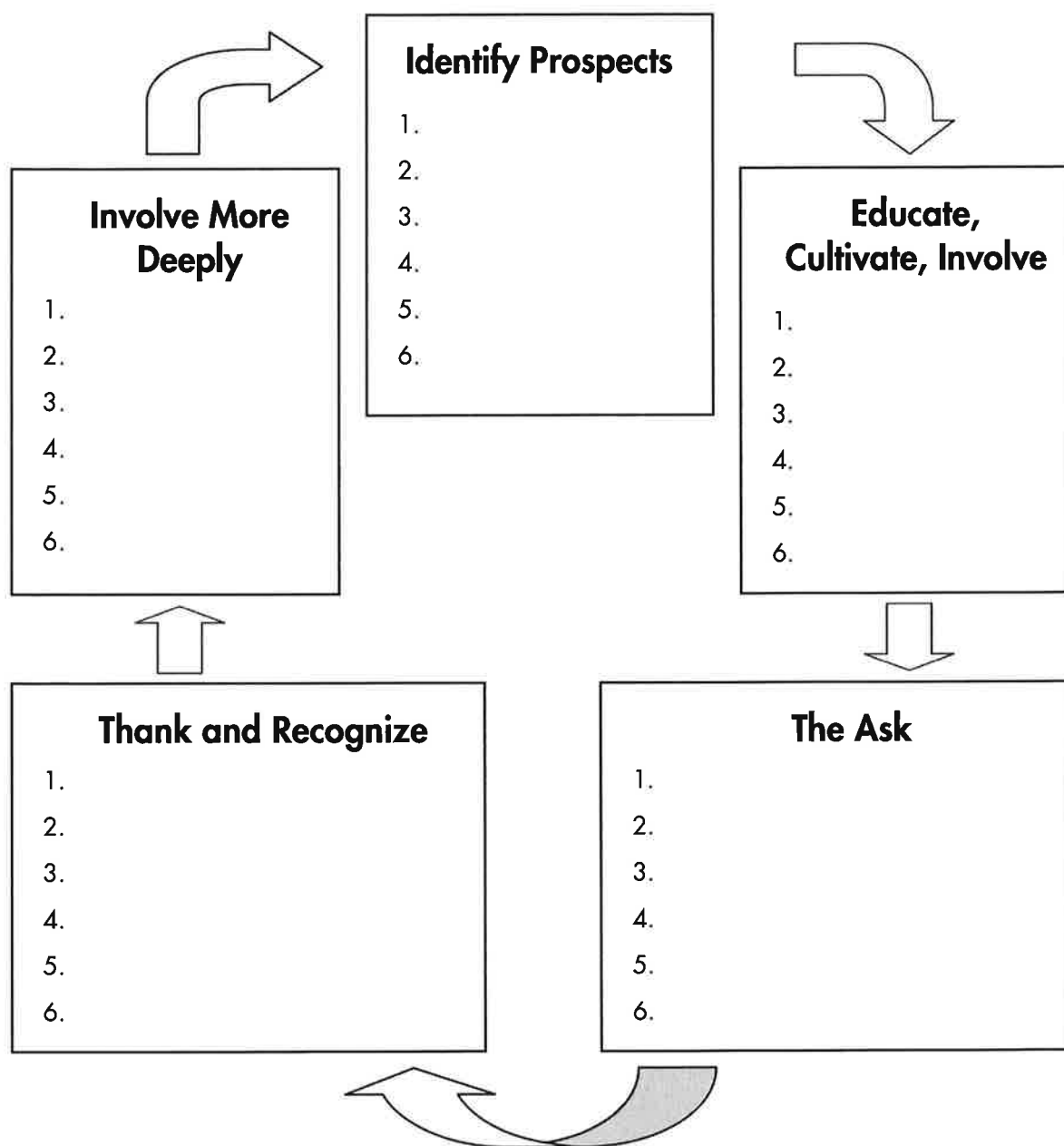
## Cycle of Fundraising

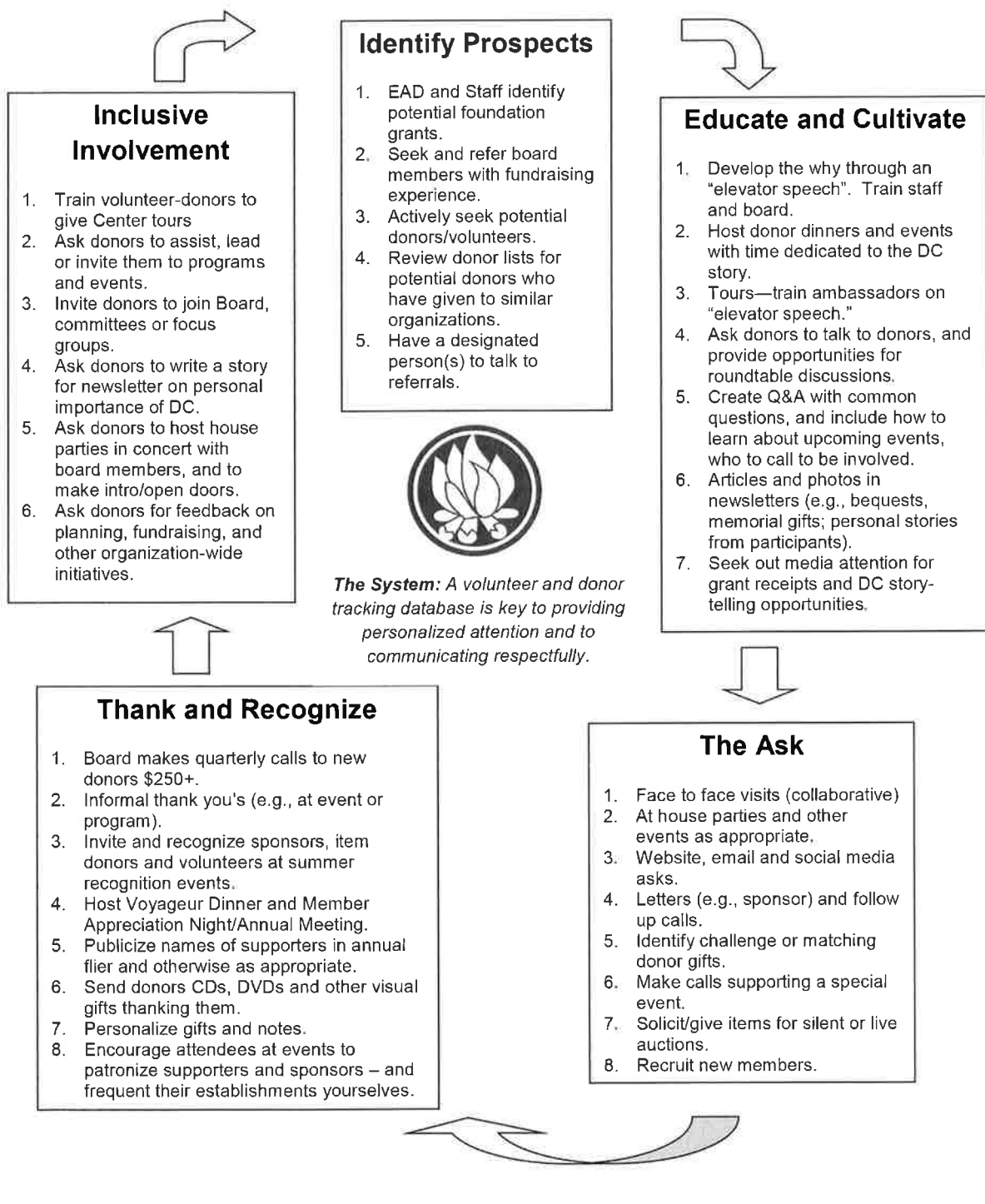


# Cycle of Fundraising

## BUILDING A DONOR ENGAGEMENT MENU

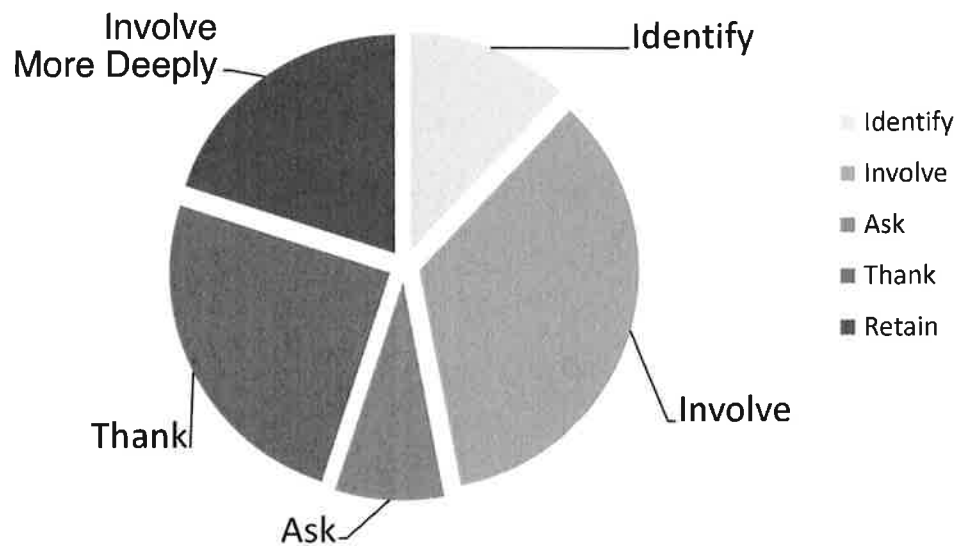
Create a menu of activities for each stage of the relationship:





## Cycle of Fundraising Time Allocation

### Breakdown of Time Spent on Each Phase of Fundraising Cycle



Adapted from Tina Cincotti, Funding Change Consulting.  
Used with permission. Thanks, Tina!

# Structuring “the ask”

1. Build rapport
2. State your goals for the meeting
3. Uncover the donor’s needs and interests
4. Present your work (the pitch)
5. Ask for the gift!
6. Respond to any objections
7. Close the meeting; restate any agreements

## The Case, Simplified -- Worksheet

### What are we selling? In other words, what do we do well?

Write down three things about our organization -- accomplishments, structure, the people involved, etc. -- that you're most proud of:

- 1.
- 2.
- 3.

### Differentiation: What makes our group unique?

What do we *have* or *do* that no one else has or does? It's OK to think about this geographically: "We are the only group in Washington County that..."

- 1.
- 2.
- 3.

### Market segmentation: Who are we trying to reach?

List the audiences we want to reach for any purpose: education, service delivery, fundraising, advocacy, collaboration, etc.

- |    |     |
|----|-----|
| 1. | 6.  |
| 2. | 7.  |
| 3. | 8.  |
| 4. | 9.  |
| 5. | 10. |

### What's your favorite story?

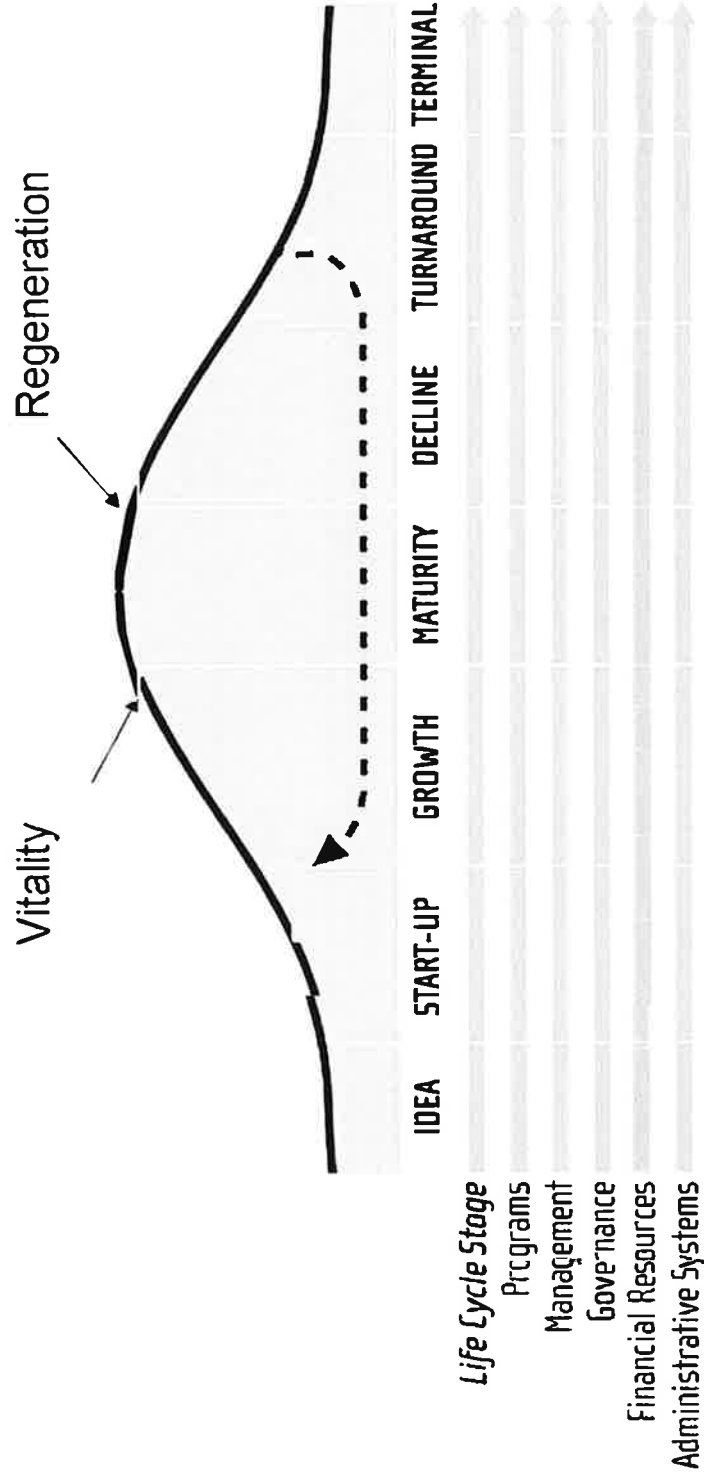
Write notes about your favorite anecdote or example that describes the impact of our work. Remember, "Statistics raise eyebrows but emotions raise money" – so go easy on the data and jargon. Pretend you're talking to a friend or neighbor.

## **Financial management 101**

### **What every board member should know...and probably doesn't**

Can you answer these questions without referring to your board materials?

1. What's your organization's annual budget?
2. What are the current sources of income for the organization – and what would be the *best* mix of income?
3. What are your largest expenses? What percentage of the budget do they consume?
4. Does your organization have a reserve fund? How much money is in it, and under what circumstances can it be used?
5. What are your organization's biggest financial risks?
6. How do you use financial management tools to measure your organization's impact?  
Does your organization compute the cost per unit of service; for example, for each client you help, audience member you entertain, or acre you protect?
7. What would help you to better understand your organization's financial status?







# Menu of 2017 Fundraising Opportunities

Board Member: \_\_\_\_\_ Date: \_\_\_\_\_

*This is an "all you can eat" menu!*

*We ask you to commit to as many items as you like – but at least one per category.*

## Appetizers

- ☐ Provide names of donor prospects
- ☐ Personalize letters to current and prospective donors
- ☐ Attend and mingle with donors at a House Party
- ☐ Introduce development staff to members of the business community

## Entrees

- ☐ Host a House Party
- ☐ Arrange a site tour for some of your friends, conducted by the Executive Director
- ☐ Accompany the Executive Director or other staff on donor visits
- ☐ Organize a 2-hour volunteer party with friends or colleagues
- ☐ Recruit new board members with fundraising experience and connections
- ☐ Recruit Wintergreens or Farm Party sponsors
- ☐ Volunteer to help at Wintergreens or the Farm Party

## Desserts

- ☐ Collect copies of other organizations' solicitations and annual reports for GCH staff
- ☐ Make thank you calls to donors
- ☐ Promote and attend one of our annual events and mingle with donors

## SFCT Strategic Plan

### Appendix C— Land Trust Alliance Re-Accreditation Application and Submission Deadlines

1. Register for Re-Accreditation November 12, 2018
2. Submit the Pre-Application March 21, 2019
3. Final application due May 16, 2019