



Five Year Strategic Plan

January 1, 2015 - December 31, 2019

Ozark Regional Land Trust

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Message from the Board

The Ozarks bio-region is endowed with a wealth of natural resources – rivers, streams, lakes, woodlands, working farms and forests, prairies, caves and innumerable species of wildlife. The majority of natural lands in the region are held in private ownership. If these lands are to be protected for future generations, conservation must be practical and attainable for the individuals and families who own the land. Land trusts have emerged as a very important stewardship tool for the permanent protection of important conservation properties.

The Board of Directors of the Ozark Regional Land Trust (ORLT) is absolutely committed to providing access to *conservation easements* and other innovative programs to protect and conserve land. This Strategic Plan is evidence of that commitment. It details our plans to operate this important land trust in a responsible and sustainable manner. We have identified our areas of focus over the next five years, our operating priorities, and our governance principles. We intend this document to serve as a blueprint for our day-to-day decision-making, as well as providing insight into our growth plans for our members, our benefactors, and the landowners in the Ozarks.

The Board is proud of our history and what we have accomplished in our first thirty years. We are even more excited about what the future holds for ORLT, and the opportunities to conserve the beautiful lands of the Ozark region. We are deeply appreciative for your interest in our work.

This Plan, approved by the Board on December 6, 2014 identifies goals and objectives that will guide ORLT over the next five years. The goals and objectives are further supported by an internal operational plan that will be evaluated and modified over time as needed. Staff use goals, objectives and the operational plan as the basis for development of annual work plans and accomplishment reporting.

Strategic Planning - *Anticipatory decision-making meant to establish a framework for making day-to-day decisions, and a means by which those decisions may be evaluated.*

Goals - *Generalized directional statements for an intended purpose (e.g., to improve, increase, maintain, decrease, provide, etc.); qualitative and usually not quantified.*

Objectives - *Concise statements of what will be accomplished.*

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Introduction

The Ozark Regional Land Trust (ORLT) is a non-profit, 501(c)(3) organization that began in 1984 and is dedicated to protecting the land, water, and unique character of the Ozark region through voluntary, cooperative conservation programs. ORLT works with landowners to permanently conserve their land primarily by holding conservation easements and accepting ownership of qualifying lands. When we assist landowners to protect their lands, we are also investing in the future by conserving productive soils, clean water and air, and opportunities for future generations to use and enjoy the precious benefits that nature provides us. As of early 2015, ORLT has helped to protect over 26,000 acres of working farms, forests, river banks and streams, caves, springs, and beautiful Ozark views.

This five-year strategic plan will guide our work as we seek to build our programs and capacity to assist landowners interested in land conservation options, thereby increasing the pace of land conservation in the Ozark region.

The Mission of Ozark Regional Land Trust

Our mission is to help people protect and conserve the natural resources and beauty of the Ozarks through conservation programs consistent with landowner goals, and to be an exemplary land steward and advocate of land conservation.

Geographic Area of Operation

The Ozarks Bio-region (also known as the Ozark Mountains) extends across five states and contain urban areas, farms, ranches, forests, glades, savannahs, and prairies. For the last 30 years, the conservation focus of ORLT has been in Arkansas and Missouri which is renowned for clear streams, rugged hills, and diverse and unique plant and animal life. The Missouri/Arkansas Ozarks are also a popular recreational destination for hiking, biking, paddling, fishing, and hunting, and a tourist attraction for the scenic views of one of the oldest mountain ranges in the US.

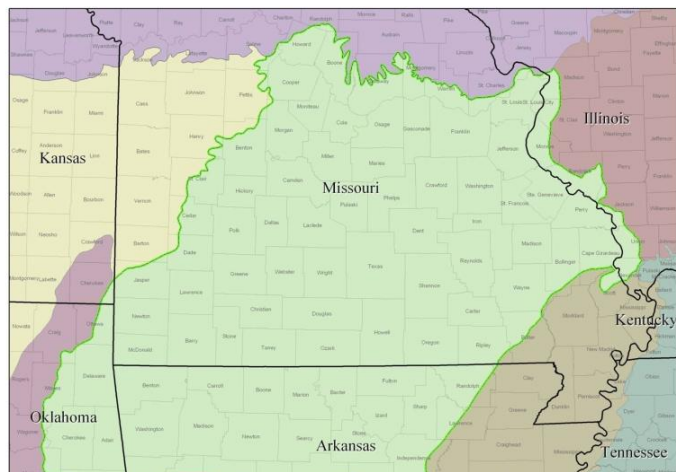


Figure 1 - Ozarks Bio-region covers primarily central and southern Missouri, northern Arkansas, and small portions of Oklahoma, Illinois, and Kentucky. ORLT's primary area of operation is Missouri and Arkansas.

In addition to innumerable caves and springs that produce hundreds of millions of gallons of water daily, the Ozarks is considered to be one of the most significant centers of biodiversity in North America, supporting more than 400 species considered globally significant, including 160 species that occur no other place on Earth.

Land Conservation

Our approach to land conservation is multi-faceted with an overarching purpose of protecting and conserving lands and natural resources of a quality and quantity that contribute to the long-term health, beauty, and integrity of the Ozark region. We achieve this by working with private landowners in a voluntary, non-regulatory way through the use of conservation easements, fee title ownership, or simply encouraging conservation and better land use practices consistent with landowner goals and desires. We also actively seek opportunities to work with other land trusts, foundations, businesses, communities, and state and federal agencies with the understanding that the reward is greater when a common goal is shared among and between partners.

ORLT's areas of emphasis include but are not limited to projects that promote the following:

- ❖ Clean and abundant water
- ❖ Working farms, ranches, and forests
- ❖ Recreational and educational values
- ❖ Scenic views and open spaces
- ❖ Culturally and historically significant lands
- ❖ Clean air
- ❖ Conservation of sensitive species, habitats, and biological diversity

RIVERS AND WATERSHEDS PROGRAM - Our Rivers and Watersheds Program is designed to maximize efforts by working with landowners and partners within key watersheds for the primary purpose of enhancing, restoring, and protecting lands to safeguard water quality, biological diversity, and scenic beauty. Our *Priority Focus Areas* include the –1) Meramec, 2) Lower Missouri, 3) Gasconade, and 4) White river watersheds. Other *Important Areas* include Bryant Creek, Niangua/Little Niangua, Upper Current, Elk, and Buffalo river watersheds.

GOAL - To protect lands of a quality and quantity that meaningfully contribute to long-term maintenance of water quality, biological diversity, and scenic views.

Objective A. Permanently conserve at least 1,000 acres in each of the *Priority Focus Areas* over the next five years.

Objective B. Permanently conserve at least 1,000 acres within the *Important Areas* over the next five years.

WORKING LANDS PROGRAM - Working lands (farms, ranches, and forests) provide important economic and conservation benefits to the people of the Ozark region. In addition to providing food, fuel, and fiber, these lands support local economies and help to maintain culturally rich traditions and regional characteristics. Moreover, working lands support fish and wildlife and their habitats, provide diverse recreational opportunities, and can be a source of renewable energy.

GOAL - To assist landowners and communities in protecting and keeping working lands productive, while helping to maintain the rural character, beauty, and health of the land.

Objective A. Permanently conserve 1,000 acres of quality agricultural lands along the Katy Trail focus area over the next five years.

Objective B. Permanently conserve 1,000 acres of working lands within the ORLT region over the next five years.

OUTSTANDING CONSERVATION LANDS PROGRAM -The Outstanding Conservation Lands Program allows us to respond to important conservation opportunities that may not neatly fit within the Rivers and Watersheds or Working Lands programs. Generally, lands falling into this program would address preservation of undeveloped land for conservation of open space to protect the aesthetic, recreational, cultural, educational, scientific, natural, and scenic resources of the region. Eligibility is determined through established criteria, and acceptance of lands for this program is based on the likelihood of fulfilling a well defined, long-term need.

GOAL - To conserve land that has unique or exceptional features warranting long-term protection and are worthy of consideration as an exceptional and outstanding property.

Objective A. Permanently conserve 3-5 high quality conservation properties over the next five years.

Objective B. Proactively identify desirable properties for potential consideration under this program, and contact and inform landowners of these properties about ORLT program options.

Stewardship and Management

ORLT's top priority is to ensure that we are an exemplary steward and manager of the land we have promised to protect whether through conservation easements, ownership, or other means. These responsibilities demand substantial commitment of staff time and supporting funds. For these reasons, we must ensure that each project is supported with a contribution to ORLT's Stewardship Fund sufficient to cover long-term responsibilities and potential liabilities (i.e., monitoring, management, and legal defense). This is the best way to ensure that a landowner's desire for permanent protection of their land is achieved.

CONSERVATION EASEMENTS - Our responsibilities for conservation easements include annual monitoring, responding to questions from landowners, processing reserved rights, and addressing violations.

GOAL I - To Maintain a positive, respectful relationship with the owners of lands on which we hold conservation easements.

Objective A. Annually contact all landowners of properties where ORLT easements exist to maintain relationships, identify issues, and determine landowner satisfaction.

GOAL II - To ensure conservation easements maintain the values and public benefits they were designed to protect.

Objective A. Stewardship of all conservation easements follow Land Trust Standards and Practices.

ORLT OWNED PROPERTIES - For lands owned by ORLT, responsibilities include regular inspections, management, boundary marking, and responding to trespass concerns.

GOAL - To be an exemplary steward and manager of all ORLT lands thereby maintaining public confidence, trust, and interest in the ORLT programs and efforts.

Objective A. Review and update all management plans for ORLT properties by December 2017 including revised implementation schedules.

Objective B. Identify ORLT lands needing management activities and implement priority management actions on each property by January 1, 2020.

Objective C. Identify and prioritize for disposal by June 2015 any ORLT properties that do not meet the mission and goals of the organization and established programs.

Outreach and Marketing

Fundamentally, our business is about people, relationships, and legacy. For some people, ORLT is a means to an end - a way to protect land and resources to be appreciated by future generations. For others, ORLT is a gateway or connection to something bigger; a set of values or common good they believe important. And to all, it's about promises and commitments.

For ORLT, cultivating and nurturing new relationships, building trust, and growing public support equals success. All of this is best accomplished through a blend of face-to-face interaction and respectful use of state-of-the-art tools for informing and engaging people. Whether you call it outreach, education, or marketing it all comes down to effective communication with a purpose.

GOAL I - To be recognized by landowners, communities, public officials, and the general public as a leader in private land protection and conservation in the Ozark region.

Objective A. Conduct frequent, regular outward communications about programs, projects, successes, and funding needs via newsletter, website, social media, presentations, and other appropriate methods.

Objective B. Develop and implement a comprehensive outreach and marketing strategy by June, 2015.

Objective C. Enhance our organizational profile and presence in the Arkansas/southwest Missouri portions of the ORLT region.

Objective D. Increase membership annually, achieving 1,000 members by January 1, 2020.

Objective E. Beginning in 2015, initiate formation of an advisory board consisting of key regional/community leaders for the purpose of increasing ORLT's public recognition and reputation as a high quality conservation organization.

GOAL II - To successfully advocate for the advancement of important conservation tools and policies at the local, state, and federal levels.

Objective A. Monitor legislative initiatives at the state and federal levels, and engage and inform legislators about issues related to land trusts and conservation easements.

Funding and Finances

The work of the Ozark Regional Land Trust is supported mostly through a combination of donations, fees, revenue from investments, and various grants. In the future, we need to seek innovative ways to diversify revenue, create sustainable funding sources, and continue to seek significant benefactors. Fundraising and seeking other appropriate sources of revenue is a continuous challenge for the organization and dictates our ability to succeed and grow in the future. For as much time as we spend working to protect important lands in the Ozark region, we must also invest significant effort to create opportunities for people who want to support land conservation and are able to generously contribute funds to sustain our mission.

GOAL I - To diversify revenue sources and aggressively increase ORLT fundraising for the purpose of significantly enhancing our conservation programs; annual income from all sources supports and sustains the operational needs of the organization.

Objective A. Develop and implement a 5-year fund raising strategy by March, 2015, followed by an annual fundraising work plan each year.

Objective B. By 2017, ORLT has at least ten new major donors (\$1,000+), and 3 major donors (\$5000-\$10,000).

Objective C. The Operating Endowment balance is at least \$500,000 by January 1, 2020.

Objective D. The unrestricted reserve fund is sufficient to cover operational expenses for at least one year.

Objective E. Double unrestricted annual operating revenue within next five years (~\$600,000).

Objective F. The Stewardship Fund continues to grow at a pace necessary to generate income to cover all costs of stewardship of both easement and owned properties.

Objective G. For selected watersheds, raise dedicated funds to cover stewardship contributions for donated conservation easements, for acquisition of land or conservation easements, and for implementation of best management practices.

Objective H. Develop a Legacy Program to promote bequeaths and estate planning that would encourage members to include ORLT in wills, trusts, or as the beneficiary to life insurance policies, IRAs, etc.

GOAL II - To ensure ORLT's financial management system follows Land Trust Standards and Practices.

Objective A. Review accounting system to prepare for future growth and ensure transparency.

Objective B. Complete an annual audit by the 2nd quarter of the following budget year.

Organizational Development

Our success has been largely due to the passion, energy, and commitment of a dedicated core of individuals. Over time, we matured from an organization powered by a few volunteers to one managed by a full-time professional staff and an active, engaged board. We have successfully developed necessary tools and procedures for continuing our work into the future, and along the way achieved a degree of recognition and respect in the conservation and land trust community. However, we clearly recognize that future success depends on our ability to improve, grow, and further develop. This means continuously improving how we do business, make decisions, and manage our assets and liabilities. In addition, we recognize that our future is greatly limited unless we can grow our organizational capacity.

GOAL I - To build organizational staff capacity to fully accomplish our mission and enhance ORLT's stature and operational ability.

Objective A. Develop and annually submit at least one capacity-building proposal to potential funders.

Objective B. Develop a prioritized, position-based staffing strategy; recruit and hire the top-priority position by July 1, 2015.

Objective C. Create and effectively engage a volunteer land stewardship support team.

GOAL II - To ensure the organizational structure of ORLT is stable and prepared for future growth.

Objective A. All priority organizational policies and procedures are approved by the Board by December 2016.

Objective B. Apply for Land Trust Accreditation within the next five years.

Governance

An organization's success can often be traced back to three critical factors: 1) clear purpose and direction, 2) leadership that is an engaged and capable of anticipating the horizon, and 3) dedicated, passionate staff. Over the years, ORLT has been fortunate in all three areas; however, meeting organizational needs and future challenges requires us to continuously improve leadership and management as well as our supporting processes and procedures. As we move forward and grow, we must give special attention to keeping board members diverse and enthusiastic, staff roles and responsibilities clearly defined, and governing processes and procedures up-to-date.

GOAL - To maintain a diverse, dedicated, and active board of directors engaged in leadership of the organization and ensuring that sufficient resources exist to carry out its programs.

Objective A. Conduct regularly planned board (at least quarterly) and committee meetings for purposes of conducting ORLT business, training, and maintaining organizational cohesiveness and collegiality.

Objective B. To maintain and regularly update a succession plan for board members and officers, including a list of potential, future board members.

Objective C. By the end of 2017, ORLT will have in place an updated set of comprehensive governance policies that clearly identify board and executive director roles and authority.

Acknowledgments

This strategic plan would not be possible without the hard work and dedication of the following individuals: Ginger Allington, Nicole Blumner, Margo Heekin, Peggy Horner, Abigail Lambert, Jeff Rosenblum, David Watson, and Lois Wyman. Dan Zekor served as planning coordinator and facilitator.



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