



# Strategic Plan

## 2020-2025

Compiled and adopted by the Board 10/10/2019



Lily Pond from Churchland Preserve, by Woodley Osborne

### Board of Trustees:

Bill Wiegmann, *Chair*  
Woodley Osborne, *Past-Chair*  
Karen Hill, *Treasurer*  
Elke Dorr  
Mickie Flores  
Stephen Rowan  
Doug Wilson  
Bert Yankielun

### Staff:

Paul Miller, *Executive Director*  
Julia Zell, *Development Director*  
Tenley Wurglitz, *Land Steward*  
Martha Bell, *Environmental Educator*  
Jacob McCarty, *Volunteer Coordinator*  
& *Office Manager*  
Terry Real, *Stewardship Assistant*



## Background

Island Heritage Trust (IHT) was founded in 1987 in order, among other things, “[t]o promote . . . the preservation of natural resources . . . [t]o use all [its] property . . . for charitable, educational, recreational, conservation, scientific or historical purposes . . . [and] [t]o preserve access to the shore for fisherm[e]n, clambers and other members of the community for public use and enjoyment now and for generations to come.” According to its mission statement, IHT contributes to the well-being of the island community by conserving its distinctive landscapes and natural resources, maintaining public access to valued trails, shoreline and islands, and by providing educational programming for all ages. As of September 2019, IHT owns 29 properties, including 24 open to the public as preserves or publicly accessible islands, helps manage four preserves held by other entities and holds 38 conservation easements and similar arrangements.

## Goals and Strategies

### 1. Overall Goal

#### a. Strategy: Excellence in all that we do

- Action: Formulate all Goals and pursue all Strategies with a view to achieving the overall Goal of Excellence in all that we do
- Action: Conduct ourselves as a responsible and well-run organization pursuing its mission diligently and with sensitivity to community needs
- Action: Apply for and receive Land Trust Alliance Accreditation as a sign of our adherence to the highest standards in the Land Trust community
- Action: Review all activities and practices for sustainability and environmental sensitivity



## 2. Stewardship Goals

### a. Strategy: Responsible stewardship of current properties

- Action: Have in place comprehensive Management Plans for each fee property and manage properties in accordance with such Plans
- Action: Continue to ensure compliance with the terms of all conservation easements
- Action: Monitor each fee property and conservation easement at least annually
- Action: Update Management Plans as needed and in any event at least every ten years
- Action: Recruit additional monitoring volunteers for fee properties
- Action: Maintain preserve trails, bridging, parking, etc. on an annual basis
- Action: Complete Kiosk construction and trail signage for preserves in accordance with IHT Branding Policy
- Action: Develop comprehensive preserve brochure and update preserve map
- Action: Continue to make available to the public information on preserve history, ecosystems and topography, primarily in digital format

### b. Strategy: Selective acquisition of new fee properties and conservation easements

- Action: Proactively use the IHT Project Selection Criteria and Checklist and available GIS-based tools to identify and prioritize Island land for conservation
- Action: Work with The Nature Conservancy to transfer ownership of Barred Island and Crocket Cove preserves to IHT
- Action: Review each proposed new acquisition for compliance with Project Selection Criteria and absence of significant conservation obstacles
- Action: Secure stewardship defense and maintenance funding for each new fee property or conservation easement
- Action: Seek opportunities to partner with other Island organizations to conserve land



### 3. Organizational Goals

- a. Strategy: Enhance community involvement and responsiveness to community needs
  - Action: Revive a permanent Community Advisory Committee
  - Action: Organize community “visioning” forums to obtain input on IHT’s mission and Goals
  - Action: Maintain public communications channels to Island community
  - Action: Continuously maintain IHT website with up to date information
  - Action: Conduct programs of interest to year-round residents in the off-season
  - Action: Conduct programs and schedule events targeted at Islanders under age 40
  - Action: Resume publication of Annual Report
  - Action: Improve Islander understanding of IHT mission and Goals
  - Action: Emphasize habitat preservation, shore access, water and air quality protection, view preservation and hunting access in communications materials
  - Action: Prepare concise description of IHT and its mission and Goals for consistent use in communications materials
  - Action: Provide letters to towns for inclusion in town meeting materials
  
- b. Strategy: Diversify Board of Trustees and Committee membership
  - Action: Add Island natives to Board of Trustees and Committees
  - Action: Recruit additional—and younger—members to Committees and eventually to the Board of Trustees
  - Action: Explore innovative recruitment strategies
  - Action: Require all Board of Trustees members to participate in appropriate Committees





c. Strategy: Strengthen Staff and Volunteers

- Action: Maintain core professional staffing for executive, development, stewardship and volunteer coordination functions
- Action: Recruit new volunteers for Preserve monitoring, trail work, shop staffing, Committees and other functions
- Action: Seek opportunities to get input from staff and volunteers about the organization's direction and performance
- Action: Seek to maximize staff engagement, professional development and retention, including by review of culture, compensation and benefits policies

## 4. Financial Goals

a. Strategy: Build Stewardship Defense and Support Fund

- Action: Build funding for accreditation requirements (or have a credible plan to do so) by accreditation application date
- Action: Seek to release restrictions on existing dedicated stewardship funds to allow use for all Stewardship needs

b. Strategy: Build Endowment and other funding sources

- Action: Build endowment to enable IHT to have financial resilience and a secure future
- Action: Continue Board of Trustees, staff and volunteer training for Development activities
- Action: Set specific Development goals and timelines for all Board Members and Development volunteers
- Action: Secure long-term funding to cover IHT's staff and operating costs
- Action: Develop a 35<sup>th</sup> Anniversary fundraising strategy
- Action: Dispose of Fiori artwork



## 5. Infrastructure Goals

- a. Strategy: Equipment acquisition to enable staff to carry out essential Stewardship, Education, Development and Administrative responsibilities without use of their own equipment
  - Action: Own or lease truck, boat, trailer and other essential equipment
  - Action: Acquire necessary office equipment and software
  
- b. Strategy: Rehabilitate Heritage House to make it a warm, safe and legally-compliant work- and meeting-place for Board of Trustees, staff and community members
  - Action: Organize a Heritage House Committee to spearhead planning and implementation
  - Action: Review building structure and grounds and devise plan for rehabilitation
  - Action: Seek membership endorsement of plan and budget
  - Action: Conduct capital campaign to raise funding
  - Action: Make Heritage House a model for environmentally sensitive and energy-efficient building practices



Barred Island Preserve, by Julia Zell