Overview of the Planning Process

In February 2016, the Placer Land Trust Board of Directors and staff initiated development of an updated strategic plan. A strategic planning facilitator, Coleen Morehead, was secured to assist in the planning process. The strategic planning process began with a review of the most recent Strategic Plan for 2010-2013, as well as the Fundraising Plan for 2012-2015. The facilitator then interviewed each member of the Board and staff in Spring 2016. During those interviews an organizational assessment and environmental analysis was conducted as a method of identifying considerations to be included in the new strategic plan. The assessment is on file at the PLT office for reference; it resulted in an affirmation of the mission statement and laid the groundwork for an update to the vision statement and new strategic goals and objectives to be supported by specific implementation strategies. A Board and staff workshop was held in April 2016, to review and evaluate a preliminary draft of the strategic plan, ultimately leading to approval of this new Strategic Plan in December 2016. Implementation plans will be developed in 2017 and annually (or as needed) to fulfill the Strategic Plan through specific, measurable goals, timelines, and accountability. The Strategic Plan is intended to be a 5-year plan covering calendar years 2017-2021.
Vision and Mission Statements

Placer Land Trust (PLT) believes that the preservation of wild open spaces, farms and ranches, natural resources, and natural playgrounds are vital to our quality of life today and in the future. Protecting these landscapes is essential to successfully build and sustain connections among people, their community, and the natural environment.

Our mission is to work with willing landowners and conservation partners to permanently protect natural and agricultural lands in Placer County for current and future generations.

Plan Goals

To guide our work to achieve the vision and mission, this Strategic Plan articulates five goals for our 2017-2021 Strategic Plan:

1. **LAND CONSERVATION:**
   PLT will work with landowners, public agencies, private organizations, and local communities to permanently protect natural and agricultural lands. Priorities for protection will be determined by a wide range of factors, including ecological uniqueness and value, habitat value, scenic attributes, benefits to water quality, recreational opportunities, and compatible agricultural value. Protection may be achieved by acquisition and ownership of property in fee title or a perpetual conservation easement, or by facilitating ownership of fee title or conservation easement by another compatible organization.

2. **STEWARDSHIP:**
   PLT will manage and monitor properties that it has protected in perpetuity through ownership of land or a conservation easement. Each property will have a management plan designed for its specific characteristics, while also responding to the evolving requirements of watershed, forest and range management, climate change, and threats from growth. PLT will also seek appropriate opportunities for enhancement of protected lands.
3. **CONNECTING LAND AND PEOPLE:**
   PLT will provide environmentally appropriate public access where it will be a benefit to the community, including trails, viewpoints, guided tours, and expanded public awareness, education, and support, and will enhance the connections between people and preserved lands.

4. **COMMUNITY OUTREACH AND SUPPORT:**
   PLT will continue and expand community outreach efforts to ensure that the public understands its vision and mission, its accomplishments, and the public benefits of its conservation success. PLT will relate its accomplishments to community enrichment as the foundation of its strategic approach to maintaining and expanding membership, donor, and volunteer support.

5. **MAINTAIN A SOLID AND SUSTAINABLE ORGANIZATION:**
   PLT will ensure that it has: (a) an effective staff and board, and the operational systems throughout the organization to provide the necessary leadership, resources, and execution to implement its mission, and, (b) a solid and sustainable financial foundation, including long-term endowment funds that will adequately support perpetual stewardship responsibilities, ongoing attention to building membership and donor support, and a proactive fund development and grant program.

Each of these five Strategic Plan goals has a number of specific objectives. These objectives are outlined below as part of the Strategic Plan and will subsequently be used as the basis for developing implementation plans. The implementation plans will identify the specific performance targets, tasks, assignments, resource requirements, and timing associated with addressing each objective.
Goal 1: Land Conservation

PLT will work with landowners, public agencies, private organizations, and local communities to permanently protect natural and agricultural lands. Priorities for protection will be determined by a wide range of factors, including ecological uniqueness and value, habitat value, scenic attributes, benefits to water quality, recreational opportunities, and compatible agricultural value. Protection may be achieved by acquisition and ownership of property in fee title or a perpetual conservation easement, or by facilitating ownership of fee title or conservation easement by another compatible organization.

I. Objective: Strategic Conservation Planning
   - Create specific and quantifiable criteria for initial prioritization of any particular parcel in Placer County and its classification by conservation objective (i.e., agriculture, American River Watershed protection, Big Hill trail connection, etc.).
   - Apply prioritization criteria to create a priority listing of selected large Placer County parcels to be used as a decision making tool for long-term strategic planning analysis within specific geographic areas with critical conservation land characteristics (i.e., valley, foothills, Sierra).
   - Develop a comprehensive plan to identify and promote, probably one at a time, high-profile conservation projects that will stand out as high priorities for the region and engage broad-based community support.
   - Rely on established conservation standards and scientific considerations when prioritizing, assessing, and protecting land.

II. Objective: Engage Local Partners
   - Continue to work with Placer County on the Placer County Conservation Plan (PCCP) and the Placer Legacy Program.
   - Continue to participate in the PG&E/Stewardship Council program and follow through on commitments as an easement holder.
   - Seek out additional opportunities to engage other complementary conservation organizations and stakeholders.
   - Maintain and enhance working relationships with state, federal, County, and other government entities (i.e., cities, water districts, utility districts, etc.).
III. Objective: Strategic Development of Innovative Opportunities
   • Concentrate PLT’s efforts on state funding via cap and trade, and healthy forests and watersheds.
   • Explore innovative ideas that may attract funding, such as carbon farming.
   • Seek opportunities to protect critical endangered species habitat.

IV. Objective: Maintain PLT as a Respected Resource for Land Conservation
   • Be a reliable resource for land conservation information.
   • Educate land owners on the benefits of preserving lands, as well as offering technical assistance and land conservation expertise while raising community awareness of the benefits of voluntary land conservation.
   • Take full advantage of opportunities presented by landowners, conservation partners, and funders that may lead to protection of high value and high priority properties.
Goal 2: Stewardship

**PLT will manage and monitor properties that it has protected in perpetuity through ownership of land or a conservation easement. Each property will have a management plan designed for its specific characteristics, while also responding to the evolving requirements of watershed, forest and range management, climate change, and threats from growth. PLT will also seek appropriate opportunities for enhancement of protected lands.**

I. Objective: Ensure that Long-Term Stewardship Obligations Are Met
   - Seek a broad spectrum of grants to support operations, programs, projects, and stewardship.
   - Utilize resource-based, market-based, revenue generation opportunities when appropriate.
   - Incorporate advanced ecology-based land management principles into PLT’s stewardship practices and staff training.
   - Develop annual work plans consistent with funding availability.

II. Objective: Ensure Adequate Capacity within Stewardship Staff and Supporting Resources
   - Review annual stewardship schedule, ongoing management and maintenance needs, identify priorities, and adjust workload as needed.
   - Seek additional local partners and volunteers to assist in stewarding PLT’s properties, especially to meet seasonal demands.
   - Develop a sustainable stewardship strategy for volunteer recruitment and training that will integrate new technologies.

III. Objective: Restore and Enhance PLT-protected lands
   - Restore and enhance PLT-protected lands, when appropriate and funding is available, to enhance existing conservation values, restore natural attributes and/or provide additional public benefit.
   - Seek opportunities to create resilient ecological communities and mitigate threats and adverse effects of drought and climate change.
Goal 3: Connecting Land and People

PLT will provide environmentally appropriate public access where it will be of a benefit to the community, including trails, viewpoints, guided tours, and expanded public awareness, education, and support, and will enhance the connections between people and preserved lands.

I. Objective: Provide Greater Public Access
   - Provide environmentally appropriate public access where it will benefit the community.
   - Seek areas of Placer County where access is needed or wanted, but barriers to access exist.
   - Identify areas with the greatest potential for expanded public access. Seek to collaborate with landowners, agencies and other complementary partners to implement strategies for areas with the greatest potential for expanded public access.
   - Integrate a prospective trail mapping system by which recreation priority areas are identified separate from other conservation acquisition priorities.
   - Work with Placer County and others to complete an approximately 50-mile continuous trail system stretching from Hidden Falls Regional Park at Coon Creek to the Bear River.
   - Increase PLT’s visibility with more trails and access to trail information (i.e., website, maps, brochures).
   - Increase number of docent led hikes and offer more specialized hikes featuring critical habitat, and land-use and conservation practices.
   - Assess PLT’s public access plans for initial and ongoing liability, risk, and known and potential costs associated with providing greater public access. Ensure these considerations and costs are adequately addressed in implementation.
   - Pursue a wide array of public access projects and benefits to serve a wide array of interests and a diversifying constituency.

II. Objective: Evaluate Feasibility and Characteristics of a Potential Future Activity Center
   - Evaluate the need for and feasibility of a future activity center and develop a conceptual plan. Determine how it could increase the connection between land and people.
   - Evaluate how an activity center could also contribute to meeting PLT’s other needs and objectives, such as for example, office space, event barn, storage, equipment yard, temporary housing, trailhead parking, or leased space for complimentary activities.
Goal 4: Community Outreach and Support

*PLT will continue and expand community outreach to ensure that the public understands its vision and mission, our accomplishments, and the public benefits of its conservation success. PLT will relate its accomplishments to community enrichment and this will be the foundation of its strategic approach to maintaining and expanding membership, donor, and volunteer support.*

I. Objective: Expand Outreach Efforts

- Create a well-defined communications plan to ensure that PLT’s existing and potential supporters and partners are inspired to support or continue supporting our work.
- Enhance, diversify and utilize PLT’s network of standing and ad hoc committees, expert advisers and informed consultants.
- Explore opportunities and increase engagement with youth and diverse membership, with an emphasis on western Placer County.
- Expand outreach to partners in West Placer County to help identify major donors and institutional donors (i.e., major new corporations, retailers, educational institutions).

II. Objective: Ensure Capacity for a Financially Self-Supporting Fundraising Program

- Measurably define “financially self-supporting” and set aspirational yet realistic goals for achievement.
- Develop a yearly schedule of events and review use of both staff time and dollars, as well as financial and social return on investment, on an annual basis.
- Increase PLT’s membership and major donor base (i.e., individuals, businesses and organizations) and increase the scale of annual giving through donor cultivation and solicitation.
- Enhance PLT’s stewardship of existing donors and volunteers, including recognition and retention.
- Increase funding from private and public grants.
- Create an effective planned giving program and implement through a sustained effort by board and staff.
- Investigate and implement diverse other fundraising strategies (i.e., funding agreements, fee-for-service) to supplement operational and program funding.
- Ensure that the Board of Directors is actively and successfully involved in fundraising.

III. Objective: Ensure the Effectiveness of Fundraising Efforts

- Periodically review and evaluate the Strategic Fundraising Plan, and revise and adapt strategies as needed.
Goal 5: Maintain a Solid and Sustainable Organization

PLT will ensure that it has: (a) an effective staff, board, and operational systems throughout the organization to provide the necessary leadership, resources, and execution to implement its mission, and, (b) a solid and sustainable financial foundation, including long-term endowment funds that will adequately support perpetual stewardship responsibilities, ongoing attention to building membership and donor support, and a proactive fund development and grant program.

I. Objective: Develop Strategies to Address Long-Term Capacity Needs
   • Create yearly opportunities (i.e., field trips, board and staff retreats, shared events) where board and staff can share ideas, strategize on moving PLT forward, and address any ongoing concerns or challenges.
   • Develop a comprehensive technology plan, including upgrades, functionality and security.

II. Objective: Ensure PLT has an Effective Staff
   • Invest in beneficial new technologies and physical assets.
   • Ensure professional staff development, including investment in staff training.
   • Enhance the process for annual reviews.
   • Develop a systematic process and schedule for compensation adjustments that is predictable and adapts to changing workloads.
   • Ensure competitive staff compensation.
   • Create a Succession Plan for senior staff.

III. Objective: Ensure that PLT has an Effective Board of Directors
   • Continue efforts to recruit more diverse board members, and diversify and increase the Board’s circles of influence.
   • Increase the capacity of PLT’s Board of Directors through training, education and other ongoing board development activities.
   • Develop a Succession Plan for Board leadership.

IV. Objective: Improve Volunteer Management Program
   • Identify and prioritize PLT’s new and ongoing needs that can be met with volunteers.
   • Enhance existing volunteer training program, create volunteer leadership program, and increase volunteer and membership involvement to help meet PLT’s needs.
   • Improve volunteer tracking and stewardship.
   • Develop affiliations and alliances with organizations that can help PLT succeed.
V. Objective: Retain PLT’s Regional and Statewide Status as an Effective and Respected Land Conservation Organization

- Continue to respond to the evolving stewardship requirements of watershed management, forest management, range management, climate change, and risk management.
- Demonstrate PLT’s capacity to acquire, manage/monitor, enhance and defend critically important conservation lands, utilizing both fee title and conservation easements.
- Continue to assess and get involved in appropriate inter-organizational efforts, such as the Stewardship Council and the Northern Foothills Partnership.

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