



2021-2025 STRATEGIC PLAN



Our Mission/Vision

MISSION:

To **restore, protect** and **promote** the Pheasant Branch Conservancy and watershed for today and tomorrow. This drives our programs and decisions as we advocate for the Conservancy, and do our physical, informational, and educational work.

HINDSIGHT: (2016-2021)

Following our 2016 plan, we strove to become increasingly effective at restoring, protecting, and promoting the Conservancy as an ecological whole.

VISION: (2021-2025)

To **foster** and **enhance** recognition by the community of our sustained stewardship of the Conservancy, and our expertise in **restoring, protecting and promoting** the Conservancy and its watershed.

Plan approved on May 17, 2021, Friends of Pheasant Branch Conservancy, Board of Directors

Cover photo: Song Sparrow by Gail Smith, used with permission.

The Conservancy, Our Organization

Pheasant Branch Conservancy is a regional treasure, a natural haven in the midst of a growing urban area. As a mosaic of marshlands, springs, prairies, meadows, lowland forest and wooded hills, it offers peace and respite to the individual, as well as educational opportunities for all ages. It is part of the 25 square-mile Pheasant Branch Watershed, which includes thousands of acres of fertile farmland as well as urban and suburban development. It is also part of the larger Yahara River Watershed.

A complex set of jurisdictions and interests affect the Conservancy and its watershed –state, city, county, townships, neighborhood and condo associations and other environmental organizations. **The Friends of Pheasant Branch Conservancy (The Friends) is the only voice speaking on behalf of this land and water system as an ecological whole.** We are vital and unique stewards of an increasingly fragile ecosystem.

Our responsibility requires systematic and agile leadership. We will be *systematic* in pursuing goals that are fundamental to our responsibility and objectives that are essential to our goals. We will be *agile* in pursuing unanticipated opportunities to enhance or protect the Conservancy and the Pheasant Branch Watershed.

We are volunteer and committee driven, managed by a board of directors and supported by members and donors. We collaborate with other stakeholders, including neighbors, the City of Middleton, the Middleton-Cross Plains School District, Dane County, the Clean Lakes Alliance, Madison Metropolitan Sewerage District, the Rock River Coalition and the Wisconsin Department of Natural Resources. We seek to be transparent and open in our planning and actions.

Our organization recognizes that the land where Pheasant Branch Conservancy is located is the traditional territorial land of several native peoples including the Ho-Chunk. In the spirit of the native peoples, we continue to discover and acknowledge the gifts the earth gives us. We cannot just take these gifts. We must give back by making the places we touch better than how we find them.

The results of our work with this collaborative network over the next five years will be measurable. We will collaborate, connect, and sustain our organization as we continue to restore, protect and promote the Pheasant Branch Conservancy.

Our Values

We advocate an urban land ethic

We operate in keeping with Aldo Leopold's advocacy of a land ethic, "which enlarges the boundaries of community to include soils, waters, plants and animals."

- We believe in the importance of the distinction between parks, which are landscaped and recreational, and conservancies, which are managed to achieve a healthy ecosystem, while providing reasonable public access.
- We believe in restoring the native ecosystems of the Conservancy by removing invasive species, gathering and planting native seeds, conducting prairie burns, and monitoring the health of all flora and fauna in the Conservancy.
- We believe in the importance of environmental education, using the Conservancy as a unique local laboratory.
- We believe in the importance of science, data and measured results in assessing our effectiveness as an organization.
- We believe that this iconic green corridor is immeasurably important to the quality of life in Dane County, to its attractiveness as a place to live and work and, accordingly, to its economic future.
- We believe in protecting and improving the water quality and environmental health of the Pheasant Branch Watershed in partnership with local governments, state and county agencies, non-profit environmental groups and water advocacy groups.
- We believe our organization must be open and accessible to all members of the community and we will achieve our greatest successes when our organization represents this entire community.

Strategic Goals

During the next 5 years our organization will take specific and planned actions that lead to the successful completion of the following goals.

Goal #1. Collaborative Management of Conservancy

The Friends will become true and equitable partners with the City and County in developing, revising, and implementing City and County plans, activities, and projects in the Conservancy.

Goal #2. Connection to Members and Users

The Friends will strengthen and foster connections with our members, Conservancy users, and stakeholders to ensure they understand and value the Conservancy and the role the Friends play in its stewardship.

Goal #3. Financial Capacity

The Friends will generate sustainable revenue sources to support ecological restoration efforts, environmental education programs, and management activities to expand its professional support team.

STRATEGIES, METRICS

For each strategic goal, the Friends have identified specific strategies and metrics for accomplishing these goals.

Goal #1: Collaborative Management of Conservancy

Strategies

The Friends will become true and equitable partners with the City and County in developing, revising, and implementing City and County plans, activities, and projects in the Conservancy.

- 1 Achieve and maintain a three-way partnership with the City and County for the benefit of the Conservancy and resulting in complementary plans and goals.
- 2 Expand and upgrade our capabilities by encouraging members to volunteer for City and County committees with decision making power for Conservancy activities.
- 3 Develop a volunteer handbook for adoption by the City, using the County volunteer handbook as a template.
- 4 Develop a catalog of resources we can offer that demonstrates the benefit of our volunteer services.
- 5 Expand land manager(s) position for work within the City portion of the Conservancy.

Metrics:

- ✓ Our goals, objectives, projects and priorities are reflected in City and County plans
- ✓ Our priorities are included in City and County budgets.
- ✓ A memorandum of understanding (MOU) outlining the relationship between the City of Middleton and the Friends for the management and utilization of volunteers is adopted by both parties.
- ✓ A MOU is established with the City of Middleton regarding a Land Manager position.
- ✓ A regular schedule of meetings are held between the Friends and City and County staff and decision makers.
- ✓ The Friends play an active role in the rewrite of the County Pheasant Branch Conservancy master plan, measured by our goals and objectives being included in the final plan.
- ✓ Friends provide comments on the City of Middleton Comprehensive Plan, measured by our goals and objectives being included in the final plan.

Goal #2:**Connection to Members and Users****Strategies**

The Friends will strengthen and foster connections with our members, Conservancy users, and stakeholders to ensure they understand and value the Conservancy and the role the Friends play in its stewardship.

- 1 Develop and utilize concise, mission-driven talking points that express the Friends' brand.
- 2 Increase collaboration with the City and County on brand strategy and messaging pertaining to the Conservancy.
- 3 Identify specific procedures and resources to assist other committees in use of digital communications to improve outreach and communications.
- 4 Identify and collaborate with other organizations aligned with Conservancy goals to pool resources and activities.
- 5 Develop user-engagement activities for all ages and underserved populations.
- 6 Expand Friends' presence on the annual city survey and explore opportunities to solicit community input.
- 7 Expand board member demographic, diversity, and skill set.
- 8 Encourage Board committee participation to both current and potentially future members.

Metrics:

- ✓ Increase membership to 1,000 by 2025 with a target of 5% of the Middleton population.
 - ✓ Achieve an annual retention rate of 80% among members.
 - ✓ Increase participation at education and restoration events.
 - ✓ Make the Friends brand and messages accessible and prominent in the Conservancy and community.
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Goal #3:**Financial Capacity****Strategies**

The Friends will generate sustainable revenue sources to support ecological restoration efforts, environmental education programs, and management activities to expand its professional support team.

- 1 Develop a fundraising strategy for operations, major projects, and endowments targeting major gifts, businesses, foundations, grants, and members.
 - 2 Once the pandemic is over, continue (and develop) in-person Conservancy events.
 - 3 Establish a “Pheasant Branch Conservancy Day” for the greater Middleton area.
 - 4 Plan for sustainable organizational financial health.
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Metrics:

- ✓ Growth and expansion of financial ability allows improved stewardship of PBC.
 - ✓ 10% increase in large donations over \$1000.
 - ✓ 5-10% increase year over year in sustainable donations.
 - ✓ Increased growth in endowment funds.
 - ✓ New fundraising sources identified and implemented.
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2021 STRATEGIC PLANNING ACTION PLAN

Priority/initiative: Strategic Plan Goal #1 Collaborative Management of Conservancy	Indicators of progress/success: <ul style="list-style-type: none"> ● High priority items completed in 2021 <ul style="list-style-type: none"> ○ City Volunteer Handbook ○ Monthly/Annual Report ○ Secure PBC Master Plan timeline
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Action steps	Lead/others involved	Time frame/Dates
Revise County Volunteer Handbook for use with City of Middleton	R&M, Education	June 2021
Present Volunteer Handbook to City	Board, Public Lands staff	August 2021
Approve Volunteer Handbook	Board, CLC, PRFC, City Council	December 2021
Develop volunteer portal on our website	Admin. Asst.	June 2021, ongoing updates
Develop inventory of skills and capabilities of the Friends		
Document volunteer accomplishments and post to website	Secretary, Admin. Asst.	Monthly
Produce annual report of volunteer accomplishments	Admin. Asst.	Prior to Annual meeting
Share annual report of accomplishments by volunteers with stakeholders	Board	As needed
Prepare draft e-mails to members for when City and County announce openings on committees		
Initiate DC Parks revision to PBC master plan	Board, DC Parks, City of Middleton	
Offer naturalist services to DC and City	Education, DC Parks	

Priority/initiative: Strategic Plan Goal #2 Connection to Members and Users	Indicators of progress/success: 1. High priority items completed in 2021 Brand messaging Enhanced digital presence Best practices/process for brand assertion defined and used 2. Solid plan and action steps to support phase 1 strategies in place.
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Strategy #1 – Flesh out the Friends brand story by developing and utilizing concise mission driven talking points.

Action Steps	Lead/Others Involved	Time frame/Dates
Develop concise, mission driven talking points to express brand.	Martha/Kaya	2021

Strategy #2 – Increase collaboration with the City and County on messaging pertaining to the Conservancy (postponed for now)

Strategy #3 – Focus on enhancing digital presence and adding additional platforms-Instagram, LinkedIn and Yelp

Action Steps	Lead/Others Involved	Time frame/Dates
Recommend to D&M Committee we add Instagram, LinkedIn and Yelp with an associated plan for account management	Kaya to start draft of recommendation including overview, work plan and estimated level of effort for group review.	2021
Look into Facebook Business Suite for streamlining social media posting.	Administrative Assistant to provide input and assistance	
Use NextDoor as a communication tool.		

Strategy #4 – Develop list of organizations (partner database) aligned with our goals for pooling resources and doing activities, if there are existing relationships to leverage; note them.

Action Steps	Lead/Others Involved	Time frame/Dates
Develop a list of organizations (partner database) aligned with our goals for pooling resources and doing activities if there are existing relationships to leverage; note them e.g. Audubon. (includes City and County?)	Committee leaders/John	Late 2021 or early 2022
Look at list of businesses that have done workdays and look to engage them further.	Chris/Pete/Gary	2022 (post-COVID)
Consider brand audit by leveraging Chamber membership and “office”	Lisa/Janet	2021

Strategy #5 – Develop engagement activities for all ages and underserved populations.

Action Steps	Lead/Others Involved	Time frame/Dates
Develop message/messaging and materials to attract members. Use the kiosks.	Lois/Goal 2 team	2021 (ASAP)
Make the Friends more visible in the Conservancy itself.	Pete/Chris	2021-ongoing
Using the expertise of our members, master naturalists, committee members etc. continue and grow educational activities to increase community understanding of the value of the Conservancy.	Education Coordinator and Education Committee	2021
Reach out to Spanish-speaking community – TWI outreach curriculum.	Kaya	2022 or 2023
Restoration workdays for families. R&M for young adults--join with OFS, Urban League, AvidTops	Chris/Pete/Gary/John	2022
Partner with Lussier Center for activities-kids paired with seniors.	John	2022 or 2023

Strategy #6 – Expand presence in City and County communications/surveys/etc. Use neighborhood newsletters and schools to communicate our activities.

Action Steps	Lead/Others Involved	Time frame/Dates
Regular communication with Mayor and City Administrator.	Co-presidents/others	2021
Have neighborhood captains that thank people for joining, give out maps, etc.	Martha/Lois	2021 or 2022
Have a script to answer questions such as “Why should I join the Friends”.	Martha/Kaya	2021
ID apartment complexes near the conservancy to post information.	Chris	2022
Have new member orientations twice per year.	Lois/Martha	2022 or 2023
Develop affinity (social) groups – birding, photography, drawing, etc.	Kaya/Chris/Pete	2022
More aggressive marketing of workdays/team building activities with businesses and corporations.	Chris/Pete/Gary	2022
Senior coffee once/year – education and social and promote legacy giving.	Martha/John	2022

Strategy #7– Expand member demographics and skill set diversity by encouraging committee participation to members and potential future members.

Action Steps	Lead/Others Involved	Time frame/Dates
Look to grow connections to diverse communities.	Kaya/John	2022
Trail ambassadors to welcome and educate trail users.	Lois/Martha	2022
Add Committee information to new member orientation, Annual meeting etc.	Lois/Committee leaders	2022
Plant seed about committee membership when people are new.	Lois/Committee leaders	2021
Request in 1-on-1 conversations to join Friends or join committees.	Martha	2021
Add committee information and promote project work – kiosks.	Committee leaders/TBD	2021-ongoing

Strategy #8 – Further brand development

Action Steps	Lead/Others Involved	Time frame/Dates
Brand Assertion – “Friends are the only voice speaking on behalf of Pheasant Branch ecosystem as a whole”.	Kaya/Lois/Martha/Lisa	2021
- Develop logo and tag line related to land and habitat preservation.	Kaya/Lois/Martha/Lisa	2021
- Reiterate Mission, Vision and Values	Kaya/Lois/Martha/Lisa	2021
- Look for ways to strengthen our brand – define our role as guardian of habitat.	Kaya/Lois/Martha/Lisa	2021

Priority/initiative: Strategic Plan Goal #3 Financial Capacity	Indicators of progress/success: Sustainable revenue growth
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Strategy #1- 10% increase in large donations (\$1,000)

Action Steps	Lead/Others Involved	Time frame/Dates
Large donor strategy		
Other strategies		

Strategy #2- 5-10% increase year over year in sustainable donations

Action Steps	Lead/Others Involved	Time frame/Dates
Establish captains in different neighborhoods and compete for the most donations/new members		

Strategy #3- Develop additional fundraising capacity

Action Steps	Lead/Others Involved	Time frame/Dates
Establish a fundraising schedule and develop additional events throughout the entire fiscal year		
Growing endowments		
Develop schedule of grant and foundation giving cycles.		

Strategy #4- Plan for sustainable organizational financial health

Action Steps	Lead/Others Involved	Time frame/Dates
Develop a 3-5 year financial pro forma to demonstrate the income and fundraising requirements to satisfy our operational goals on a sustainable basis.	Jim and Finance Committee	3 to 5 years
Delay the hiring of a development director for at least three years.	Board of Directors	