



# 2017 – 2022 Strategic Plan

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**Harford Land Trust, Board of Directors**  
**April 2017**

## INTRODUCTION

As Harford's only countywide land trust, the Harford Land Trust (HLT) serves a vital role in preserving our rural heritage. The organization was founded in 1991 by a group of local residents who wanted to ensure that land with significant environmental, cultural, historical, or scenic value remained intact. Since its inception, HLT and our partners have helped protect more than 11,000 acres of farms, forests, and wetlands. HLT currently owns or holds permanent conservation easements on nearly 1,500 acres of land throughout the county.

The HLT Board of Directors, staff, and key stakeholders met in February 2017 to review our vision, values, and mission and outline our goals for the next five years. The 2017 – 2022 Strategic Plan summarizes these seven goals along with a series of strategies and activities for achieving each goal.

Our primary goal of preserving and stewarding land in Harford County remains unchanged. Over the next five years, we also plan to increase awareness of our mission and opportunities for community recreation, stewardship, education, and volunteering. We intend to establish a Development Committee to oversee and direct our donor and membership programs to ensure a stable and growing base of financial support. A notable inclusion in the 2017 – 2022 Strategic Plan is a goal to attain accreditation through the *Land Trust Accreditation Commission*. While HLT already follows the *Land Trust Standards and Practices*, accreditation is an important next step to formalize our commitment to operating with the highest standards.

On behalf of the Board of Directors, we look forward to continuing to work hand-in-hand with Harford County residents to preserve our open space.

Benjamin A. Lloyd, President

## **OUR MISSION**

To work with landowners, private and public, to conserve land and protect its natural resources, scenic beauty, rural character, and promote a healthy quality of life in Harford County.

## **OUR VALUES**

- HLT believes its effectiveness depends on maintaining the highest levels of credibility, confidence, and trust within the community it serves. For this reason, we hold ourselves to the highest performance standards and employ the most advanced and innovative practices in the conduct of our work.
- HLT believes it has a primary responsibility to the community at large and because of this we are obligated to consider, evaluate, and discuss the needs of that community in relation to our mission.
- HLT believes that we must consider the full implications of our actions. We recognize that we must meet our ethical obligations to the public, our donors, landowners, taxpayers, the land, our mission, the land trust community, and the community at large. Our ability to fulfill our mission depends on people trusting us to care for the land and invest our time and resources in efforts that promote the public good.
- HLT seeks to instill a conservation ethic by connecting people with land. Conserving land through legal means alone does not ensure that society will value and support ongoing care for these lands in the future. We seek to foster a conservation ethic by providing opportunities for people of diverse backgrounds to experience the restorative and intrinsic values of conserved land so that they will better understand and appreciate its many benefits and, in turn, become advocates for its preservation.
- In our work we look for opportunities to assist similar organizations in accomplishing their goals. We work collaboratively to assist our partners and to help craft conservation solutions that best serve the needs of involved parties, promote the realization of shared objectives, and create lasting value for the people of Harford County and beyond.

**OUR VISION FOR HARFORD COUNTY**

Our vision is for all Harford County residents, present and future, to have access to open space. We want our landscape to continue to be characterized by forests, fields, and farms and well-planned, diverse communities bordered by a healthy Susquehanna River, Gunpowder River, and Chesapeake Bay. Additionally, we envision a future where citizens' lives are enriched by the abundance of natural areas in our county. We hope that Harford's residents, particularly youth, are also educated and inspired to become active stewards of the land.

**OUR VISION FOR HLT**

Our vision is for HLT to be a model community-based conservation organization. We aim to be widely known for our action-oriented, nonpolitical approach to land preservation. HLT will continue to be attentive stewards of Harford County's natural resources through alliances and partnerships with other nonprofit organizations, governmental entities, businesses, and a broad segment of the Harford County community. Under the direction of a diverse team of leaders, HLT will be a robust and financially secure organization that Harford County residents depend on to protect our open space.

## **GOVERNANCE AND MANAGEMENT OF HLT OPERATIONS**

### **Goal 1. To maintain an effective and efficient operation, guided by the *Land Trust Standards and Practices*, within the approved annual budget.**

#### *Strategy 1.1. Maintain and enhance good governance practices.*

- 1.1.1. Review vision and mission and make adjustments as needed (at least once every five years).
- 1.1.2. Establish strategic goals for implementing the mission and review and update as needed (at least once every five years).
- 1.1.3. Evaluate progress against the strategic goals, including programs and activities, and make adjustments as needed (at least annually).
- 1.1.4. Continue to follow the 2017 *Land Trust Standards and Practices* as HLT's ethical and technical operating guidelines (ongoing).

#### *Strategy 1.2. Ensure adequate planning, capacity, and organizational structure to sustain and continually improve operations.*

- 1.2.1. Review committee charters, leadership, and members, and adjust as needed to carry out functions (annually, following completion of the annual workplan).
- 1.2.2. Increase Board membership, with a focus on including individuals with diverse skills, backgrounds, and interests (approximately 15 individuals by 2022).
  - Conduct an assessment of current Board members' skills, backgrounds, and interests; identify gaps and develop a recruitment plan (2017).
  - Establish an orientation program for new Board members (e.g., land trust functions, HLT history, responsibilities, and policy review) (2018) and assign a current Board member as a mentor (ongoing).
  - Develop a succession plan for Executive Board positions (ongoing).
  - Consider establishing an emeritus or honorary Board of former Board members and other key stakeholders with advisory, community engagement, and fundraising responsibilities (2018).

#### *Strategy 1.3. Develop an annual workplan, to include personnel and/or committee responsibilities and goals, in conjunction with the annual budgeting process (annually, during the fourth quarter).*

- 1.3.1. Before revising the annual workplan or undertaking any significant new actions, determine whether adequate human resources and funding are available (ongoing).
- 1.3.2. Review progress against annual workplan and take corrective action or make amendments as needed (quarterly).

#### *Strategy 1.4. Consistently maintain the highest financial management standards and operate HLT within the agreed annual budget.*

- 1.4.1. Develop an annual budget, in conjunction with the annual workplanning process (annually, during fourth quarter).

- Committee chairs submit financial needs for inclusion in the annual budgeting process (annually, during fourth quarter).
  - Limit growth of operating budget to 10% per year (ongoing).
- 1.4.2. Review budgetary position and take corrective action or make amendments as needed (quarterly).
  - 1.4.3. Review investment funds performance (quarterly) and evaluate relationship with contracted broker (annually).
  - 1.4.4. Maintain a contracted or staffed bookkeeping position as funds allow (2018).
  - 1.4.5. Revise current Gift Policy for land and other tangible gifts to limit reputational and financial liability (2017).

## **Goal 2. To attain LTA accreditation.**

*Strategy 2.1. Prioritize accreditation at the Board level and devote required resources to the accreditation process.*

- 2.1.1. Assign an accreditation champion (e.g., Executive Director, Board member, former Board member) and team to manage the accreditation process and delegate work (2017).
- 2.1.2. Develop a multi-year workplan for achieving accreditation, including a budget and human resources plan (2017).
  - Secure LTA accreditation preparation grant (2018).
  - Solicit support from a trained assessor (i.e., through LTA or Maryland Environmental Trust [MET]), if available, to facilitate the pre-assessment (2018).
  - Board to review and approve workplan and budget (2018) and review progress thereafter (quarterly).

*Strategy 2.2. Implement accreditation workplan.*

- 2.2.1. Complete self-assessment (2018).
- 2.2.2. Delegate identified deficiencies to appropriate committee for corrective action (2018 and 2019).
- 2.2.3. Register for accreditation (2019).
- 2.2.4. Submit pre-application (2020, three months before application); apply for accreditation (2020); and attain accreditation (2021).

*Strategy 2.3. Use LTA and other peer land trusts' resources and contacts for advice and example documents/processes wherever possible.*

- 2.3.1. Use LTA Pathways intranet to organize accreditation efforts and facilitate delegation of deficiencies among HLT Board members and staff (2017).
- 2.3.2. Utilize LTA online resources (e.g., Policy Builder and examples of required documents) wherever possible (ongoing).
- 2.3.3. Establish a mentor relationship with a similar land trust in Maryland that recently attained LTA accreditation (2017).

## LAND ACQUISITION, PRESERVATION, AND MANAGEMENT

### **Goal 3. To preserve land in Harford County, according to our mission, through acquisitions, easements, and partnerships.**

*Strategy 3.1. Strategically pursue land preservation projects that meet our land preservation criteria and are within our target preservation areas.*

- 3.1.1. Review and revise land preservation criteria (e.g., contiguous properties, at-risk properties, and high quality environmental value) and target preservation areas (e.g., Deer Creek watershed) and make adjustments as needed (annually).
- 3.1.2. Identify and prioritize projects (i.e., property “wish list”) within target preservation areas that meet land preservation criteria (ongoing).
- 3.1.3. Utilize all available preservation programs such as the Maryland Program Open Space, Maryland Rural Legacy Program, and the Harford County Agricultural Preservation Program as well as MET resources (ongoing).

*Strategy 3.2. Review and revise project selection, acceptance, and disposal criteria.*

- 3.2.1. Consider revising project selection criteria to include potential indirect benefits of land protection (e.g., community support and involvement, public access, and education opportunities) (2017).
- 3.2.2. Where projects meet selection criteria, prioritize projects that may lead to funding opportunities to support forest, wetland, and habitat restoration and mitigation (ongoing).

*Strategy 3.3. Selectively engage in partnerships that support land preservation in the county.*

- 3.3.1. Work with federal, county, and state governments (e.g., U.S. Army, Harford County Parks and Recreation, Harford County Planning and Zoning, and MET) to advance shared objectives (ongoing).
- 3.3.2. Work with existing non-governmental partner organizations (e.g., Susquehannock Wildlife Society, Chesapeake Conservancy, and The Nature Conservancy) and seek new partnerships with values similar to HLT to preserve targeted properties (ongoing).
  - Consider developing a process to evaluate potential new partners and/or a partnership policy (2018).
- 3.3.3. Support private landowners interested in land preservation (ongoing).
  - Participate in county-sponsored landowner meetings (ongoing).
  - Meet with individual landowners that express interest in land preservation (ongoing).
  - Update “Landowner Options” handout and other related material as needed (ongoing).

*Strategy 3.4. Evaluate future participation in the Army Compatible Use Buffer (ACUB) Program.*

- 3.4.1. Conduct an analysis of the human resource capacity required to continue ACUB participation (upon ACUB continuation).
  - Should ACUB participation continue, explore options for funding a

part-time contractor to manage day-to-day requirements and to liaise with ACUB counterpart (2017 and 2018).

- 3.4.2. Should ACUB participation continue, complete preservation of remaining priority properties in the ACUB areas as quickly as possible (ongoing).

**Goal 4. Manage all lands, structures, and waters for which HLT is responsible in a sustainable manner, protecting both the natural and cultural resources for the benefit of current and future generations.**

*Strategy 4.1. Be effective and model stewards of all land for which HLT is responsible.*

- 4.1.1. Ensure that stewardship requirements are considered and documented upon acceptance of any new lands or conservation easements (ongoing).
- Within one year of each new fee simple acquisition, develop an individual land management plan that describes the resources in need of protection, identifies HLT's long-term objectives for the property, and includes an implementation plan for the management activities recommended (ongoing).
  - For each new conservation easement, a baseline documentation report is prepared prior to closing and signed by the landowner at closing to document the important conservation values and condition of the property (ongoing).
- 4.1.2. Monitor each property for which HLT is responsible (at least annually).
- Monitor each fee simple property for potential management problems, keep a permanent record of monitoring reports, and promptly take action to rectify management problems discovered during monitoring visits or in response to neighbor complaints and/or suggestions (at least annually).
  - Monitor each conservation easement property (including those co-held with MET), keep a permanent record of monitoring reports, and promptly take appropriate enforcement steps in the event of any violation of the easement (annually, between January 15 – March 30 if possible).
- 4.1.3. Implement management plans on HLT-owned properties, using volunteers and/or contractors (ongoing).
- Maintain prioritized "wish list" of projects relating to invasive control, habitat restoration, and structure stabilization (ongoing).
  - Utilize Land Stewards' volunteer time to support ongoing stewardship needs (ongoing).
  - Continue Deer Herd Management Plan on designated properties (ongoing).

*Strategy 4.2. Encourage environmentally sustainable public access on HLT managed lands.*

- 4.2.1. Maintain adequately marked boundary lines for fee simple properties and identify each fee simple property with an HLT sign (ongoing).
- 4.2.2. Explore options for developing a pilot public trail system (and potential bike path) on one HLT-owned property (e.g., Monks Creek, Otter



Creek) (2018).

- Design the trail system, engaged professional support as necessary (2018).
- Consider partnering with a community organization (e.g., Eagle Scouts, outdoor clubs) that is committed to mobilizing volunteers for trail development and ongoing maintenance (2018).
- Develop a project plan, to include funding and resource requirements, and present to HLT Board for approval (2019).

*Strategy 4.3. Keep agriculture and forestry on properties under HLT management (both fee-simple and conservation easements) in production, where feasible and appropriate.*

- 4.3.1. Ensure that land management plans include the use of agricultural and forestry best practices, if applicable (ongoing).
- 4.3.2. Seek to establish and maintain agriculture, forestry, and aquatic enterprises through leases as an income stream for HLT, where feasible and permitted (ongoing).
- 4.3.3. Encourage conservation easement holders to continue agricultural and/or forestry production on the land, where feasible and appropriate (ongoing).

## OUTREACH AND FUNDRAISING

### Goal 5. Increase local awareness and visibility of HLT’s mission and impact.

*Strategy 5.1. Develop a communications strategy and an annual communications program/calendar to guide all public relations activities.*

- 5.1.1. Develop a multi-year communications strategy, to include an audience and communication channel analysis, brand guidelines, key messages, and digital strategy (i.e., website, social media) (at least once every five years).
- 5.1.2. Develop an annual communication program/calendar aimed at allincreasing HLT’s profile in the community and attracting new individual and corporate members and volunteers (annually).
- 5.1.3. Develop a suite of communication materials, including tailored material for Board members to conduct outreach and publicize events (2018).

*Strategy 5.2. Refresh HLT website and social media presence.*

- 5.2.1. Migrate HLT website to new platform that is more mobile responsive (2018).
- 5.2.2. Per communications strategy, revise and/or launch new social media accounts (2018).
- 5.2.3. Develop and implement a social media content schedule (2018).
- 5.2.4. Review Google analytics metrics regularly to evaluate effectiveness of communication campaigns (quarterly).

*Strategy 5.3. Increase HLT mentions in the press.*

- 5.3.1. Develop relationships with relevant media outlets (ongoing).
- 5.3.2. Draft and disseminate press releases (at least quarterly).
- 5.3.3. Aim to be seen as a “go-to” resource for the media for objective information related to land preservation and open space in Harford County (ongoing).

### Goal 6. Support opportunities for environmental stewardship, education, and outdoor recreation as a means to encourage community appreciation and support for HLT’s mission.

*Strategy 6.1. Ensure appropriate capacity to oversee and coordinate community engagement activities.*

- 6.1.1. Increase Outreach and Membership Committee size to ensure appropriate capacity to oversee all public engagement activities; consider including non-Board members on committee (2018).
- 6.1.2. Expand and improve volunteer program.
  - Identify a volunteer leader and team of community engagement volunteers; consider increasing paid staff time to provide support for implementation if funds allow (2018).
  - Consider recruiting a team of approximately ten volunteer monitors from HLT members and utilize MET’s volunteer stewardship and easement monitoring training for volunteers (2018).

- Identify opportunities to engage members as volunteers (ongoing).
- Provide HLT-branded apparel (or other visible items) to volunteers to promote HLT in their communities (ongoing).

*Strategy 6.2. Sponsor education, stewardship, social, and fundraising events that bring together existing and potential HLT members, supporters, and volunteers.*

- 6.2.1. Hold the HLT annual meeting, ensuring that it is both an informative and social event (annually).
- 6.2.2. Continue to strategically host fundraising events; evaluate the cost/benefit of each effort before committing to the event (ongoing).
- 6.2.3. Utilize HLT-owned property for events to encourage public awareness and enjoyment of HLT's land and mission (ongoing).
  - Explore adding a fundraising event that takes place on an HLT-owned property (e.g., 5k run or adventure race) (ongoing).
  - Encourage the use of HLT-owned lands for scientific and cultural research and maintain copies of all final research reports produced in the HLT files and library (ongoing).
  - Facilitate community groups and partners' use of HLT-owned lands for educational, scientific, and recreational purposes (ongoing).

## **Goal 7. Ensure a stable and growing base of financial support.**

*Strategy 7.1. Create a donor-centric culture within HLT that engages everyone (i.e., Board members, staff, and volunteers) in fundraising activities under the direction of a Development Committee.*

- 7.1.1. Establish a Development Committee to drive and oversee all fundraising and membership activities; consider including non-Board members on the committee (2018).
- 7.1.2. Incorporate fundraising responsibilities into the Board member job descriptions and recruitment process (2017).
- 7.1.3. Incorporate fundraising responsibilities into the Executive Director job description and evaluate during annual performance review (2017).
- 7.1.4. Develop a Fundraising Plan (2018, reviewed annually).
- 7.1.5. Provide information sessions for the staff, Board members, and volunteers about fundraising (semi-annual).

*Strategy 7.2. Build strong, engaged relationships with current and potential supporters.*

- 7.2.1. Conduct an analysis of individual and corporate membership trends, including renewals, over the past ten years (2017).
- 7.2.2. Create a plan to address lapsed membership, encourage greater giving, and attract new members (2018).
  - Explore creating a "sustaining" member category of donors committed to annual giving (2018).
  - Explore creating an "HLT Protector" or "HLT Ambassador" category of committed annual donors with responsibilities for networking on behalf of HLT and advising on membership engagement (2018).
- 7.2.3. Develop a calendar of membership engagement, to include virtual and

face-to-face interaction (annually).

- Increase the number of personal interactions by Board members with key donors (e.g., call plan) (ongoing).
- Develop a periodic newsletter; distribute via email and hard-copy by request; and, post on HLT website (at least quarterly).

7.2.4. Establish a mentor relationship with another Harford County membership-based nonprofit with a successful fundraising track record (2018).

*Strategy 7.3. Explore opportunities to diversify funding sources.*

7.3.1. Increase focus on grant opportunities, particularly unrestricted grants to fund operating costs (ongoing).

- Identify grants and make a calendar of deadlines (annually).
- Ensure that HLT has sufficient grant writing skills, either through paid staff or volunteers (2018).

7.3.2. Prioritize earned income opportunities (e.g., agriculture leases, monitoring fees, and public programs) (ongoing).

- Consider the development of income streams from volunteer-led field activities such as hikes and bird-watching, utilizing a donation-based fee system (2020).

7.3.3. Explore options to grow the Johnston Hegeman Land Fund (ongoing).

- Calculate LTA recommended defense and stewardship funds for fee simple properties and conservation easements (2017).
- Develop a disposal plan for surplus land to reduce management responsibilities and generate revenue (2018).

7.3.4. Promote HLT's Planned Giving Program to select civic groups and businesses (ongoing).