



# *Strategic Plan*

*2017-2020*

December 2016, FINAL

## *Table of Contents*

---

<b>Purpose of Strategic Plan</b> .....	<b>1</b>
<b>Balsam Mountain Trust: Mission, Vision, and Stakeholders</b> .....	<b>1</b>
<b>Governance</b> .....	<b>2</b>
<b>Scene Set: Balsam Mountain Trust Status/Outlook in Context of Balsam Mountain Preserve</b> ..	<b>2</b>
<b>Road Map for Key Focus Areas</b> .....	<b>3</b>
<b>Environmental Education</b> .....	<b>4</b>
<b>Natural and Cultural Resource Stewardship and Research</b> .....	<b>6</b>
<b>Nature Center</b> .....	<b>8</b>
<b>Strategic Initiatives for Essential Support Services</b> .....	<b>9</b>
<b>Fundraising</b> .....	<b>9</b>
<b>Management</b> .....	<b>10</b>
<b>Process for Periodic Review and Updating of Strategic Plan</b> .....	<b>11</b>
<b>Appendix I, Strategic Initiative Metrics</b> .....	<b>12</b>
<b>Appendix II, Strategic Initiative Scorecard</b> .....	<b>16</b>

## **Authors, 2016**

### **Board of Trustees**

Rob Howard, chair  
Janie Stratigos, vice-chair  
Ed James, treasurer  
Linda Outlaw, secretary

Mary Arbaugh, Al Tunstall, Carol Landers, Sheri Straw, Peter Bates, Peter Smith

### **Staff**

Michael Skinner, executive director  
Rose Wall, senior naturalist/education coordinator  
Jen Knight, interim naturalist

## Our Purpose

*As background, in 2015 the Balsam Mountain Trust (BMT) Board and staff began work to develop a Strategic Plan (SP).*

The Purpose of the SP is to provide a perpetual ‘Road Map’ to guide the planning and activities to be carried out by the BMT during the 2017-2020 time frame. The following key points were used in creating the map:

- Our Mission Statement was assessed and a revision was approved that reflects the current focus of BMT
- The SP incorporates inputs of key BMT stakeholders, gathered through structured Focus Group discussions in 2015-2016
- The SP for 2016 identifies opportunities and potential organizational goals to be considered/pursued/measured in the 2017-2020 time frame

## Our Mission

*The Balsam Mountain Trust inspires people to be responsible stewards of the natural and cultural resources of the Southern Blue Ridge Mountains through education and conservation leadership.*

## Our Vision

- Enhance our position as a key environmental education partner with schools, community and government organizations, reaching diverse audiences and inspiring life long stewardship of the natural world.
- Establish BMT as a regional field research site, partnering with universities, regional biological stations and other similar organizations to expand research opportunities in western NC.
- Embrace and practice sustainability in all operations and facilities, serving as a leader for the BMP community.

### Key Stakeholder Groups

Members of the BMP community: by delivering programs that educate and enrich this constituency

Local and regional communities: by delivering Environmental Education (EE) programs to local schools and other related institutions germane to our mission

Research partners: by providing secure and accessible resources (e.g., land, water, flora, fauna, etc.) and supporting the facilitation of research projects on the Preserve

## Governance of the Trust and the Strategic Plan

- A Board of Trustees leads the organization and provides oversight/guidance to the executive director
  - The Board has an Executive Committee (EC) comprised of the chair, vice-chair, treasurer and secretary; BMT executive director serves as ex-officio
- The EC leads development of the SP, reviews and approves the contents and manages the process for periodic review and updating of the plan
- The executive director is responsible for BMT's day-to-day operation and serves as an advisor to the Board of Trustees

## Scene Set: BMT Status and Outlook

### Status and plans for BMP's Development:

- In early 2016 BMP Real Estate Holdings, LLC became the new developer for BMP
- BMP Real Estate Holdings, LLC is owned by BMP residents who have a history of financial support for the Trust
- In 2016 they initiated planning for making BMP a sustainable development
- The developer is working with BMT to find a permanent home for the Nature Center/Trust offices

### Conservation Easement Land:

- Roughly 3,500 of the 4,400 total acres at BMP was placed in conservation easements (CE)
- CE land cannot be used for housing, club facilities, farming, etc., and limited timber harvesting is permitted if done to improve forest health
- The CE was placed, and is held by, the North American Land Trust (NALT), which is responsible for maintaining adherence to the provisions written into the CE documents
- Since formation of the CE, BMT has maintained a productive working relationship with NALT
- David Carlile, dba: BMG, LLC, owns the CE land on BMP
- BMT's ability to influence actions which improve the overall health of CE land requires close cooperation with the CE land owner

## Road Map for the Key Focus Areas, 2017-2020

**Three Key Focus Areas were identified as critical for carrying out the Trust's mission:**

- Environmental Education
- Natural/Cultural Resource Stewardship and Research
- Nature Center

*For each of these Focus Areas, we have identified Strategic Initiatives to be evaluated and pursued in the 2017-2020 time frame to enhance BMP and improve BMT's performance.*

**Additionally, we rely on efficient and effective Support Services to implement all work, and have identified several Strategic Initiatives for these essential support services:**

- Fundraising
  - Management
-

# Education

**Mission:** Provide cohesive education programming which encourages active environmental conservation in our region.

**Vision:** Enhance our position as a key environmental education partner with schools and community organizations, reaching diverse audiences and inspiring life long stewardship of the natural world.

## **Strategic Initiative #1: Implement core messages into all EE programming:**

- We've identified three key messages:
  - Nature is valuable inherently and for the resources it provides to humans, e.g. food, clean water, medicine, etc.
  - What BMT does to make a difference (BMT mission and our role in conservation)
  - What individuals can do to make a difference (provide direct actions and service options where appropriate)

## **Strategic Initiative #2: Establish BMT as a key environmental education partner in schools and libraries (Public Outreach Services), helping to create an informed and environmentally conscious population:**

- Deliver high quality programming that improves public knowledge and environmental stewardship
- Recruit teachers, county representatives and members of the local school boards to serve on the Education Committee
- Continue curricula evaluation and revision to reflect school standards, teacher needs, etc., as gathered from teacher/curriculum coordinator focus groups; explore possible program offerings for upper grade levels
- Through partnership with AmeriCorps, continue growing our reach to “underserved” community members, including evaluating room for expanding the Adopt-a-School and the 1st and 2nd grade monarch program
- Evaluate possible expansion of library and other public programs with special consideration of staffing
- Work with fundraising committee to search for education grants and sponsors
- Expand partnership with local universities leveraging BMP land as a laboratory for student research projects

**Strategic Initiative #3: Increase member participation in programs, offering a variety of services that expand BMP members' knowledge of their local area and care for the Preserve's natural and cultural resources (BMP member services):**

- Review and revise member programs plan based on focus group feedback to increase participation and support
- Expand and evaluate experiences that may reach a larger audience, such as: member sponsored outings, self-guided tours, and social media based programs, e.g., Facebook, Walk for Wildlife, etc.
- Work under “Balsam Backyards” theme to expand community knowledge of the local area through a schedule of high season offerings including Trust Talks, hikes, private guided walks on members' homesteads, and other novel programs
- Offer twice-seasonal Habitat Workshops, through the Habitat Review Board, whereby BMP members become engaged with the holistic process of building/living in this community
- Encourage and enlist BMP members to participate in Citizen Science initiatives

**Strategic Initiative #4: Determine, and continue to evaluate, the optimal animal collection complement to meet Trust's education needs:**

- Develop an animal program plan: system for selection and acquisition of any new animals wanted/needed to add to the living collection; same process for removing
- Continue to research and implement the best possible care for living collection; implement best practices for animal care in design phase of new nature center

# Natural and Cultural Resource Stewardship and Research

**Mission:** Facilitate platforms for the collection, evaluation and dissemination of scientific research results and best management practices applications, by which stakeholders can cultivate a resource stewardship ethos both on the Preserve and in the Trust's service region.

**Vision:** Establish BMT as a regional field research site, partnering with universities, regional biological stations and similar organizations to expand research opportunities in Western NC.

## **Strategic Initiative #1: Encourage, solicit and implement 1-2 research projects annually through application, interest, evaluation and relevance to BMP and the region:**

(All Strategic Initiatives and metrics correlated to CE land use/access, depend upon permission granted by CE owner of record)

- Continue a mutually beneficial working relationship with CE owner of record
- Expand and encourage partnerships with local/regional institutions of higher learning, ngos, government entities, etc., leveraging BMP land as a laboratory for research projects and general natural and cultural history learning opportunities; work with research principals to seek funding for projects
  - Solicit researchers, students, volunteers, etc., to perform properly constructed projects which can result in factual, relevant and beneficial results and applications
  - Work with BMP developer of record, as well with BMP members/homeowners, to encourage research project start-ups on common property and/or individual homesteads
  - Continue to implement projects funded with the endowed undergraduate research award with UNC-A
  - With funding availability, develop and implement plans for establishing a working Biological Research Station on the property

**Strategic Initiative #2: Evaluate, prioritize and implement routine long-term data collection, inventories, forest health evaluations, etc., relevant to the Trust's mission:**

- Work with the BMP developer of record, NALT and CE owner of record to steward the health of the natural and cultural resources on BMP
  - Determine the appropriate suite of data to collect annually that will: a) support the stewardship of BMP land, b) support education programs, and c) serve as a resource for researchers to utilize
  - Create a user-friendly database that can be used in-house for: writing grants, evaluating forest health, and supporting education programs; and, externally as a resource for researcher partners
  - Work with WCU's Natural Resources department (Pete Bates, et al faculty/students) and other potential partners to encourage field laboratory work
-

## Nature Center

### **Strategic Initiative #1: Establish the permanent home for the Trust (Nature Center and offices):**

- Maintain close working relationship with developer in selecting the site
  - Develop plans for the new nature center
    - Requisite project management roles assigned to complete team
    - Select key service providers (e.g., architect, prime contractor)
    - Determine needs for capital campaign and implement if required
    - Obtain board approval for final cost and schedule estimates prior to commencement of work
  - Implement during design process for the new Nature Center
    - Create a sense of place and a conservation ethos in owners and visitors
    - Use sustainable design techniques as practical (these can serve as a model for BMP members to implement into their homes)
-

## Essential Support Services: Fundraising

### **Strategic Initiative #1: Increase the income for the Trust in order to support the educational programming, natural and cultural resources, and management and facilities initiatives:**

- Compare/contrast list of donors for each giving year
- Construct metric to measure past donors who gave but did not continue to donate
- Determine the best person to investigate the reason for no donation in a given year
- Explore why some members who utilize BMT services do not donate
- Increase the number of homeowners who donate to the Trust annually
- Increase the number of Boarding House partners who donate annually
- Continue to host annual Labor Day Trust Party fundraiser

### **Strategic Initiative #2: Build awareness of BMT's value and importance to the owners at Balsam Mountain Preserve and its considerable public outreach to surrounding communities:**

- In conjunction with Environmental Education committee, develop programs that will interest and educate owners at Balsam who do not typically, participate in programs

### **Strategic Initiative #3: Expand outside funding through grant applications and increasing Adopt-a-School business sponsor support:**

- Work with the executive director and Education Committee to apply for 1-3 outside grants to support the BMT's Environmental Education programming
- Work with the Environmental Education Committee to build local business support of the Trust to provide environmental education programs to students in Jackson and Haywood Counties

### **Strategic Initiative #4: Consider feasibility of a capital campaign for a new Nature Center:**

- Work with the Facilities Committee on the design of the new Nature Center
- If considered feasible, then determine best strategy, and develop and implement a capital campaign for a new Nature Center

## Essential Support Services: Management

### **Strategic Initiative #1: Ensure the continuous high-value staff support necessary to allow all BMT's expanding programming to be delivered:**

- Build BMT's relationship with AmeriCorps by providing quality project opportunities to each service person, coupled with superior mentoring by BMT staff
- Continue/improve volunteer recruitment, training and recognition processes

### **Strategic Initiative #2: Continue to improve efficiency and effectiveness of BMT operations:**

- Initiate the first review and updating of the Strategic Plan
- Cultivate positive working relationships with other organizations/departments at BMP, e.g., Developer, Club, Community Association (CA) Maintenance/Security, Boarding House, etc., by participating in coordinated forums, efficient exchange of information, solving communication issues, etc.
- Continue close engagement with NALT in all areas of mutual interest; maintain NALT representation on the BMT Board and develop face-to-face contacts with NALT leaders whenever practical
- Evaluate creation of "Green Team" concept at BMP, including members of the Trust, CA and various BMP departments – Trust to help lead improved sustainability efforts
- Explore methodology/metrics for conducting 'self-evaluations' of the BMT Board, with the goals of identifying potential improvements in how we carry out our Mission
  - Refer to materials collected in 2015 that describe some concepts for doing this

## Method for Periodic Review and Updating of the SP

### The Board will conduct a yearly review of the SP in order to:

- Assess metrics to evaluate meeting of key goals (see Appendix I and II)
- Help identify and define critical Goals for the Trust for the next year
- Evaluate changes in the ‘external environment’ of BMT’s operations to determine the impacts of these changes in defining future goals

### The following process is proposed for reviewing and updating the SP:

- At three of the four Board meetings each year, the Board will have a brief discussion of progress on key SP strategies and tactics, and they will identify any initiatives that need special attention, additional resources, or a re-formulation of the initiative (see Appendix II)
- At one meeting each year, the Board will conduct a more extensive review of progress on the SP, discussing each initiative, reviewing the progress metrics and deciding on follow-up actions required (The desirability of future formal updates to the SP can be discussed as well)

## Appendix I: Metrics

The following metrics will be used as a method for assessing progress toward achieving the SP initiatives. Each strategic initiative has a specific metric(s).

### Education

#### **Strategic Initiative #1: Implement core messages into all EE programming:**

- All programs have standardized written curriculums that include how these three messages will be addressed by the end of 2017

#### **Strategic Initiative #2: Establish BMT as a key environmental education partner in schools and libraries (Public Outreach Services), helping to create an informed and environmentally conscious population:**

- Bi-annual meetings held with key partners for our "flagship" public school programs to review programming, discuss revisions/updates and explore new opportunities (will have 2 meetings in year 2018 and each consecutive year)
- 30% increase in number of public programs by end of 2019 (use 2016 numbers as baseline, can include education programs using new methods such as education bins)
- Minimum of 3 students (high school or college) complete a field biology-based internship with BMT by the end of 2019
- 90% of all public programs rated at excellent or good
- Pre/post tests consistently show improvement in environmental knowledge and attitude (have greater knowledge of and more positive attitude about the subject material after BMT has delivered program; will be evaluated on sub-set of flagship programs)

**Strategic Initiative #3: Increase member participation in programs, offering a variety of services that expand BMP members' knowledge of their local area and care for the Preserve's natural and cultural resources (BMP member services):**

Note: For member metrics, we will adjust for the increase in number of homeowners

- 20% more members participating in programs by the end of 2019 (use average across 2013-2016 as a baseline)
- 20% more new people participating in programs by the end of 2019 (use Trust Talks and Treks as subsets with baseline to be created in year 2017)
- 20% more participants engaged in BMT social media by end of 2019 (measured differently in different social media platforms, using average across 2014-2016 as a baseline for Facebook and Walk for Wildlife and 2016-2017 as a baseline for Project NOAH and website)

**Strategic Initiative #4: Determine, and continue to evaluate, the optimal animal collection complement to meet Trust's education needs:**

- Animal program plan completed and used for all animal collection decisions by end of 2017

---

## Natural and Cultural Resource Stewardship and Research

Note: All Strategic Initiatives (SI) and metrics correlated to conservation easement (CE) land use/access, depend upon permission granted by CE owner of record

**Strategic Initiative #1: Encourage, solicit and implement 1-2 research projects annually through application, interest, evaluation and relevance to BMP and the region:**

- 1-2 scientific (field-based) research projects started annually (must complement Trust mission, accommodate appropriate stakeholders on BMP, e.g., Community Association, etc., will be dependent on funding, relevance to BMP, best practices, etc.)
- Final paper provided by research principle(s) for Trust's permanent records at completion of project

**Strategic Initiative #2: Evaluate, prioritize and implement routine long-term data collection, inventories, forest health evaluations, etc., relevant to the Trust's mission:**

- Data collection plan developed and implemented annually
- 

## Nature Center

**Strategic Initiative #1: Establish the permanent home for the Trust (Nature Center and offices):**

- Project Management Team in place prior to start of work with all key contractors selected
  - Final cost at/below budgeted amount
  - Nature Center in permanent location by end of 2019
- 

## Essential Support Services: Fundraising

**Strategic Initiative #1: Increase the income for the Trust in order to support the educational programming, natural and cultural resources, and management and facilities initiatives:**

- Trust income increased by 10% each year, excluding developer sales donations

**Strategic Initiative #2: Build awareness of BMT's value and importance to the owners at Balsam Mountain Preserve and its considerable public outreach to surrounding communities:**

- Number of donors to Trust increased 10% each year

**Strategic Initiative #3: Expand outside funding through grant applications and increasing Adopt-a-School business sponsor support:**

- 1-3 outside grants submitted by Executive Director/staff each year
- Business sponsors committed for all Adopt-a-School program schools

## **Strategic Initiative #4: Consider feasibility of a capital campaign for a new Nature Center:**

- If determined a capital campaign is needed, the plan is developed and implemented by the start of 2019
- 

## **Essential Support Services: Management**

### **Strategic Initiative #1: Ensure the continuous high-value staff support necessary to allow all BMT's expanding programming to be delivered:**

- Service Person from AmeriCorps or similar organization engaged with BMT each year
- Number of Volunteers at or above 2016 baseline each year

### **Strategic Initiative #2: Continue to improve efficiency and effectiveness of BMT operations:**

- Formal review of Strategic Plan performed annually
- NALT rep on BMT Board; good relationship maintained with NALT
- "Self-Assessment" of the Board to determine effectiveness completed by 2018

## Appendix II: Strategic Initiative Scorecard

Note: This will be added after board review/approval at January 2017 meeting.