



Strategic Plan

2017 - 2020

“Promoting Excellence in Land Conservation”

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Approved by OLTA Board of Governors

May 2, 2017

EXECUTIVE SUMMARY

The global conservation movement is becoming more sophisticated, accountable, and better-informed in efforts and organizational structures and systems. This is in response to increasingly stringent expectations for fiscal transparency, efficient operations, clarity of measurements and results, and total guarantees of permanence.

Entering its 15th year, OLTA needs to acknowledge and reflect these changing circumstances and expectations in land conservation. To be successful, the organization needs to demonstrate maturity and professionalism to gain the full support and confidence of donors, funders, and partners. The imperatives have never been clearer: the work of land trusts is more critical now than ever but the sector will not achieve its full potential in land conservation without sustained efforts and consistent leadership. OLTA has an opportunity to carry the torch for excellence; in the quality of conservation work and sector stability and credibility.

VISION

OLTA works to advance overall excellence in community land conservation in Ontario as a non-partisan and independent organization that promotes best practices and organizational excellence. It aggregates and shares land trust data and partners in research and education to contribute conservation planning expertise. It also continues to operate and expand as a trusted funding program administrator to support the sector.

MISSION

To strengthen land conservation in Ontario by building and supporting a strong land trust movement.

2017 BOARD OF GOVERNORS

Kristie Virgoe - Chair

George Gordon - Secretary

Bill Lougheed – Treasurer

Mark Bisset – Governor

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Barbara Heidenreich - Governor

Frank Shaw - Governor

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BACKGROUND

The directives determined at the OLTA Board "Blue Sky" offsite on Feb 17/18, 2017 represent a significant shift in focus, mandate, and messaging. While the existing mission statement continues to be viewed positively (and was therefore left unchanged), the priorities identified to support the mission are quite different and much more aligned with global land conservation trends. With intentions to take a stronger leadership position in the sector, a defined focus for the organization's finite resources, and a clearer value proposition, OLTA has an opportunity to become more relevant to funders, partners, donors, and the land trust and conservation community overall.

That being said, there will understandably be a transition period from the *reactive* grant-funded organizational cycle that has defined OLTA for 15 years, and into a well-focused *proactive* entity with defined objectives and Key Performance Indicators. Additionally, beyond the fact that it is financially prudent, OLTA has an obligation to continue to successfully deliver currently funded programs, and a responsibility for grant applications in progress.

In the midst of this transition, however, there will be an immediate shift from investing scarce time and energy in chasing "any and all" potential funding to seeking programs, partnerships, sponsors, and donors that feed directly into the new priorities. It will take some time to cultivate the best messaging, the most relevant relationships in some new networks, and to flush out detailed proposals and opportunities with targeted funders; both new and existing. The transition timelines involved are such that, unless a grant application already in progress is successful, current revenue projections for this fiscal year (ending June 30, 2017) are unlikely to change.

As a result, in the short-term there must be on-going re-evaluation of timelines and cash flow projections to look for efficiencies until revenue sources under the new plan are identified and accessed. Additionally, the operational plan and budget for next fiscal year commencing July 1, 2017 should be structured around financial realities and expected activities at the time of development (i.e. in the weeks following the approval of the strategic plan).

The long-term vision for OLTA, however, is an organization that is much more impactful, professional, and can access reliable funding from a variety of sources. With careful roll-out of this agenda, the right mix of staff skills, and unified Board support, a strong foundation can be established to build on for years to come.

The following Strategic Priorities are designed to help guide activities and decision-making at OLTA over the next three years:

1. **Fund Administration** to facilitate pace and financial support for community land conservation
2. **Research and Education in Conservation Excellence** to elevate the quality of information available in community land conservation
3. **Promote Land Trust Organizational Excellence** as a champion of permanence and professionalism in community land conservation
4. **Upgrade organizational excellence and financial stability at OLTA** to Improve the pace of growth, the quality of leadership, and the permanence of impact at OLTA

2017 - 2020 STRATEGIC PRIORITIES

1. Fund Administration

Facilitate PACE and Financial Support for community land conservation

Continue to offer financial support for land acquisition, stewardship, and capacity-building in all available ways (especially rewarding those following S&P/Accreditation Process as much as is permitted by parameters of funder).

Operational Activities:

- continue to successfully administer OLTAP via Environment and Climate Change Canada
- create proposal to create or take over administration in Ontario of one existing funding program in the next three years

2. Research and Education in Conservation Excellence

Elevate the QUALITY of Information available in community land conservation

Assist with on-going efforts towards well-informed planning, mapping, and prioritizing through research partnerships, the aggregation of meaningful land trust and conservation data, current

reference documents, and various educational activities. These activities broaden the relevance of the work of OLTA and the land trust community in wider conservation circles, including the academic world.

Operational Activities:

- design regional conference/workshops schedule (for both new/small and advanced organizations)
- on-going update of reference documents library on website
- look for research opportunities in partnership with colleges and universities to advance understanding of big issues as they relate to land conservation such as: Biodiversity Targets, Climate Change, Links between Human Health and Nature, Conservation Priorities in First Nations
- explore possible course/curriculum development in partnership with MNRF, NCC, and other institutions that may eventually lead to certification in specialized areas of land conservation
- explore partnerships and opportunities with new academic funders, foundations (McLean, Peacock, Gosling, Woodcock, Ivey, Metcalf, Tides Canada), as well as existing supporters (TD, NCC, MEC, MNRF, ECCC)

3. Promote Land Trust Organizational Excellence

Champion PERMANENCE and Professionalism in community land conservation

With the Canadian Standards & Practices at the core, promote a culture of professionalism and credibility in community land conservation for land trusts of all sizes and stages of development. Stable, well-resourced organizations can deliver on the promise of perpetuity made to land donors, partners, and funders via exceptional operational systems and fiscal prudence. FUTURE GOAL: Participation in a Sector-Wide Assess-Your-Organization (AYO)/Accreditation Program (with OLTA as first participant)

Operational Activities:

- contribute to updates on CLTA Standards & Practices project and share best practices for both acquisition and stewardship

- create Training Guide to update legacy Conservation Easement Agreements
- partner with Nature Conservancy of Canada to implement Financial Literacy Tool (with possibility of payment for performance)
- research AYO program and, eventually, full sector accreditation program (and help small orgs trying to raise QC bar)

4. Upgrade organizational excellence and financial stability at OLTA

Improve the PACE of Growth, the QUALITY of Leadership, and the PERMANENCE of Impact at OLTA

OLTA needs to refine organizational priorities and funding model around its new strategic goals. For example, OLTA should embark on an organizational accreditation process to "walk the walk" in organizational excellence. With a new focus on research/education, OLTA can flush out opportunities to work with academic funders, as well as existing environmental funders, in the development of advanced courses and/or curriculum.

There is also the need to further develop OLTA's individual non-voting membership and fundraising/donor system around the strength of the organization's new strategic direction.

Operational Activities:

- initiate OLTA accreditation via Imagine Canada
- evolve fundraising/individual member/donor system for OLTA, including possible hiring of pro fundraiser