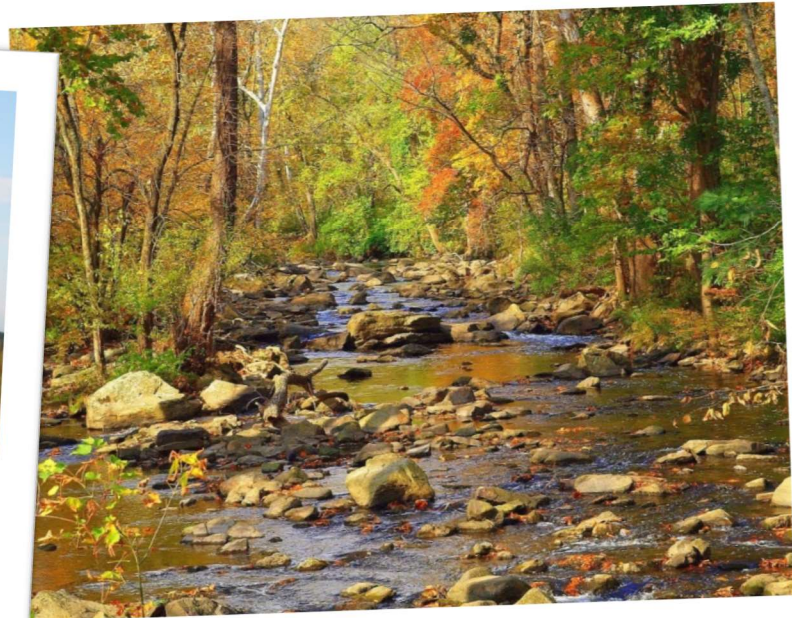




**Strategic Plan**  
**2017-2022**  
**Version 6.14.17**



## OVERVIEW

Looking toward the 50<sup>th</sup> anniversary of the Pennypack Ecological Restoration Trust and beyond, the Board and staff reflected upon the Trust's mission, role, and future direction.

The Trust is operating from a position of strength having effectively promoted the Preserve as a place for education, research and a demonstration of enlightened land stewardship. It is reasonably secure financially. Its two-decade focus on land acquisition has been a success. In fact, the number of acres directly under its protection grew 115% in 23 years (to 827 acres). It has garnered a positive regional reputation for excellence in ecological restoration.

The Trust is poised to create a bigger footprint locally and regionally as well as in the fields of land preservation and ecological restoration. A few key parcels of unprotected land are still available. Stewardship of the already preserved lands has risen in importance. This Strategic Plan is a roadmap for a refreshed trajectory, building on past successes and taking full advantage of new opportunities.

### Major goals for the next five years are:

- **High-impact Ecological Restoration** – having a significant and demonstrable effect by addressing the invasive plants and animals that are inhibiting full success in ecological restoration.
- **The Next Generation of Stewards** – educating, exciting, and engaging future champions of the Preserve. Connecting to the community and to the network of natural areas throughout the region.
- **Remain Forever** – enhancing the Board's vitality and staff capacity and focus. Generating and managing greater resources. Protecting key tracts of land. Strengthening the Trust's infrastructure.

## GUIDING PRINCIPLES

### Mission

The mission of the Pennypack Ecological Restoration Trust is to steward the Pennypack Preserve as an important open space component of the region's natural areas network, and to educate and encourage people to appreciate, enjoy, and protect the Preserve's native ecosystems.

### Vision

The Trust envisions the Pennypack Preserve as a vibrant, native ecosystem. To that end, by 2021 the Trust will be:

- A fully resourced, sustainable land trust supported by the public and government agencies.
- A widely-recognized leader in developing and implementing innovative solutions for ecological restoration
- An influential thought-leader in scholarly research on the restoration of natural areas in urban settings
- A sought-after educator and demonstrator of stewardship best practices for teens and adults

### Philosophy & Values

The Trust not only acknowledges the need for an ongoing conversation around the coexistence of people and the environment at the Preserve. It strives to strike the "right" balance between leaving the Preserve untouched and facilitating community-wide ownership of the ecological integrity of the Preserve.

In light of this dialogue, the Trust's Strategic Plan is grounded in core organizational values:

<b>Sustainability</b>	The Trust embraces "forever" as its central intention, ensuring that the natural integrity of the Preserve remains intact and thrives for generations.
<b>Education</b>	The Trust feels a responsibility to advance a deeper understanding of ecological restoration and stewardship to educators and learners.
<b>Impact</b>	The Trust intends to have a significant and demonstrable effect on both people's mindsets and attitudes as well as on the physical condition of the Preserve.
<b>Collaboration</b>	The Trust seeks collaborative partnerships where they can add value to achieving systemic and common goals.
<b>Community</b>	The Trust believes that the ecological integrity of the Preserve not only has intrinsic value, but also is essential to the well-being of communities both close to and well beyond the Preserve.



## INITIATIVES

### Goal 1: High-Impact Ecological Restoration

The Pennypack Preserve is a reclaimed remnant of the original natural landscape, unifying individual parcels with varying land-use histories. Today it is a nearly contiguous 827-acre mosaic of natural landscapes within an urban environment. The two major drivers of the ecosystem are invasive plants and white-tailed deer; both need to be controlled to allow natural regeneration to occur.

Over the next several years, the Trust will make a significant and demonstrable impact on restoring the Preserve's native ecosystem while continuing to pursue land protection as opportunities arise. With a strong regional reputation for excellence in the field of ecological restoration, the Trust is well positioned to be successful.

Guided by its multi-year planning, the Trust will undertake capital reforestation projects and initiatives designed to remove invasive plants, enhance biodiversity, and reduce deer density. These plans require increased financial investment as well as new collaborations and expertise. A focused staff and greater use of volunteers will work in concert with the strategic oversight of the Board's Stewardship Committee.



*Ecological restoration is assisting the restoration of disturbed natural lands so that native species dominate and the restored ecosystem is stable, self-sustaining, and resilient to outside stresses.*

**Key Projects: Papermill Woods, Peak Woods, Overlook Woods, Bethayres Woods, Mitchell Woods, Cathedral Meadows, Pennypack Parkway, Raytharn Farm, and other targeted areas throughout the Preserve**

Objective 1.1: Remove and manage invasive plants.	Objective 1.2: Establish newly forested areas and fill in forest gaps.	Objective 1.3: Undertake innovative projects to enhance biodiversity, and to foster connections with the larger ecosystem.	Objective 1.4: Reduce deer density to levels that allow for natural regeneration.	Objective 1.5: Elevate the strategic oversight of the Stewardship Committee.
<ul style="list-style-type: none"> <li>• Document multi-year proactive stewardship plans for key areas. <b>STAFF</b></li> <li>• Focus staff energy and outside expertise on projects designed for long-term systemic impact in key areas. <b>STAFF</b></li> <li>• Enlist large, supervised groups of volunteers to remove invasive plants. <b>STAFF</b></li> </ul>	<ul style="list-style-type: none"> <li>• Identify areas in need of afforestation and set priorities for capital and other stewardship projects. <b>STAFF</b></li> <li>• Document a multi-year proactive plan to reforest gaps quickly and to suppress invasive plants that germinate during young tree growth. <b>STAFF</b></li> </ul>	<ul style="list-style-type: none"> <li>• Evaluate the Raytharn grassland project to determine the future value of this landscape. <b>STAFF &amp; STEW COMM</b></li> <li>• Diversify the suite of species in Papermill Woods as existing trees decline/die. <b>STAFF</b></li> <li>• Study the synergistic effects of invasive plants and mammals in forest regeneration. <b>ED &amp; STEW COMMS</b></li> </ul>	<ul style="list-style-type: none"> <li>• Evaluate current hunting practices to inform adjustments to deer management goals and logistics. <b>STEW COMM</b></li> <li>• Utilize the results of deer research to adjust and refine deer management strategies. <b>STEW COMM</b></li> </ul>	<ul style="list-style-type: none"> <li>• Document a three-year preserve management plan for the Committee's bi-annual review. <b>STEW COMM</b></li> <li>• Document a 3-year preserve management plan for the committee's ANNUAL review. <b>STAFF</b></li> <li>• Invite people with specialized expertise to participate on the Committee. <b>GOVERNANCE</b></li> </ul>

## Goal 2: The Next Generation of Stewards

The Pennypack Preserve is not isolated, autonomous, or self-contained. Flooding generated in watershed communities upstream has a severe effect. Invasive plants and deer do not respect property boundaries. Challenges are manageable only when individuals and institutions are joined in a common understanding of and commitment to the environment. To that end, educating the public, the Trust's membership, and the professional community about ecological restoration is a core goal.

Over the next several years, the Trust will emphasize promotion of the Preserve as a place for education, research and demonstration of enlightened stewardship. Deeper research will boost the Trust's impact and professional recognition. A more expansive view of connections to the region's natural area network calls for greater public outreach. Starting with those with the greatest potential to be stewards, the Trust will use education as a gateway for introducing the Preserve as a living laboratory to students, community groups, and the more environmentally aware segment of the public. By recruiting leaders who are intent on championing a movement of many, the Trust will attract and prepare the future stewards of the Preserve. The Trust will work to engender greater cooperation of neighboring residents. It will work in concert with government agencies as they confront dynamic issues such as stormwater management and the pressure of continued real estate development.



Engaging visitors, students, and the environmentally-aware public		
Objective 2.1.1: Raise awareness of the importance of ecological restoration.	Objective 2.1.2: Engage schools, families, and other groups in utilizing the Preserve as a living laboratory.	Objective 2.1.3: Facilitate visitors' appropriate enjoyment of the Preserve.
<ul style="list-style-type: none"> <li>• Brand the Preserve as a regional treasure. <b>DEV (MARKETING)</b></li> <li>• Emphasize ecological restoration in programming and communications. <b>EDUCATION COMM</b></li> <li>• Develop issue-based programming and communications to reach the environmentally aware public. <b>EDUCATION AND DEV (MARKETING)</b></li> <li>• Collaborate with key affinity groups to broaden and deepen people's understanding of ecological restoration. <b>EDUCATION COMM</b></li> </ul>	<ul style="list-style-type: none"> <li>• Establish a Board Education Committee. <b>GOVERNANCE</b></li> <li>• Engage a dedicated educator to provide on-site programs, act as a liaison with schools, and for community outreach. <b>ED COMM &amp; EXEC. DIR.</b></li> <li>• Enhance relationships with neighboring school districts. <b>STAFF</b></li> <li>• Elevate the educational component of volunteering. <b>STAFF</b></li> <li>• Explore the type of facilities needed to support on-site educational programs. <b>EDUCATION COMM</b></li> </ul>	<ul style="list-style-type: none"> <li>• Improve signage and educational communications to enhance the visitor experience. <b>STAFF &amp; ED COMM</b></li> <li>• Maintain and improve the condition of trails to promote appropriate use. <b>STAFF</b></li> <li>• Groom major entrances to improve visitor appeal and "first impressions." <b>STAFF</b></li> <li>• Review program offerings to ensure ongoing relevance and mission alignment. <b>ED COMM</b></li> <li>• Develop programming around the renovated greenhouse complex to encourage greater engagement. <b>STAFF &amp; ED COMM</b></li> <li>• Develop and promote several "themed" walking itineraries to reflect specific interests. <b>STAFF</b></li> <li>• Educate visitors on the implications of their activities on wildlife and people using the Preserve for quiet and solitude. <b>STAFF &amp; ED COMM</b></li> </ul>

Fostering collaboration & connection		
Objective 2.2.1: Develop and cultivate an institutional culture that encourages and promotes ecological research.	Objective 2.2.2: Formalize relations with local and state government agencies.	Objective 2.2.3: Enhance neighbors' ownership in the ecological integrity of the Preserve.
<ul style="list-style-type: none"> <li>Promote the Preserve as a research-friendly, living laboratory to targeted universities and other organizations engaged in similar activities. <b>EXEC DIR</b></li> <li>Support efforts to increase funding for Preserve-related research. <b>EXEC. DIR</b></li> <li>Maintain and enhance the long-term physical security of research areas. <b>STEWARDSHIP COMM</b></li> <li>Promote research results to visitors and members. <b>ED COMM</b></li> <li>Allocate staff time for project development and monitoring. <b>EXEC DIR</b></li> <li>Participate actively in regional research associations. <b>EXEC DIR &amp; STAFF</b></li> <li>Design and monitor all stewardship activities so that they are documented by solid record- and data-keeping. <b>STEWARDSHIP COMM</b></li> <li>Emphasize a commitment to and experience with research in the qualifications of future Executive Directors. <b>GOVERNANCE</b></li> </ul>	<ul style="list-style-type: none"> <li>Remain an active participant in the Delaware River Watershed Initiative. <b>EXEC DIR &amp; STAFF</b></li> <li>Advise and consult with the municipalities in the Pennypack Creek watershed to improve stormwater management. <b>EXEC DIR</b></li> <li>Support municipal outreach for stormwater grant applications and provide input on proposals. <b>EXEC DIR</b></li> <li>Work with municipalities on land protection issues, including creative alternatives for protecting open space. <b>LAND ACQUISITION</b></li> <li>Participate in regional advocacy campaigns around environmental issues such as land protection and "bird town" designations. <b>EXEC DIR</b></li> <li>Train volunteers to monitor water quality and to be environmental advocates. <b>STAFF</b></li> <li>Maintain and improve the Preserve's physical connections with county and municipal trails and parkland. <b>STAFF &amp; STEW COMM</b></li> <li>Continue to collect road-kill deer. <b>STAFF</b></li> </ul>	<ul style="list-style-type: none"> <li>Increase outreach to and interactions with neighbors about stewardship activities at the Preserve. <b>EDUCATION &amp; DEV (MARKETING) COMMITTEES</b></li> <li>Educate near-neighbors about the implications of their activities on the health of the Preserve and the broader ecosystem. <b>EDUCATION &amp; DEV (MARKETING) COMMITTEES</b></li> </ul>



### Goal 3: Remain Forever



Since its founding, the Trust has been led by champions who put their full force behind rescuing and restoring the Preserve and neighboring land. Today, a small staff works with the Board and limited resources to generate a successful operation: a balanced budget, growing endowments, 20,000 visitors a year, and 1,200 members. At the same time, the Trust needs more robust support to accomplish its visionary and necessary goals in restoration, stewardship, land protection, research, and education.

Over the next several years, the Trust will undertake several initiatives, building on its solid foundation of management and leadership. **It will raise its profile to stand out among myriad priorities competing for people's attention.** Greater community presence and building relationships with individuals and institutions will increase engagement and support. Greater emphasis on major and planned gifts will augment resources generated through the membership program. Multi-year operating and capital budgets will work in concert with endowment investment strategies that take both a short and long view. **Physical structures on the property will be evaluated for their value and most effective use.** Spurred by dwindling government support for land protection, the Trust also will seek bequests and other planned gifts in order to be ready to protect key adjacent properties as they become available.

<b>Objective 3.1.1: Attract Board talent needed to advance implementation of the Strategic Plan.</b>	<b>Objective 3.1.2: Elevate the engagement of individual Board members.</b>	<b>Objective 3.1.3: Enhance the robustness of Board committees.</b>	<b>Objective 3.1.4: Sharpen attention to best practices in Board governance.</b>
<ul style="list-style-type: none"> <li>Identify outstanding talent needed based on strategic priorities. Emphasize the criteria of affinity to the Trust (support, passion, knowledge) and the ability to contribute key skills in the recruitment process. <b>GOVERNANCE COMMITTEE -BOARD</b></li> <li>Design the nominating process to utilize the networks and ambassadorship of the full Board. <b>MESSAGE THE BOARD MORE FREQUENTLY</b></li> <li>Recruit advisors: scientists, educators, government liaisons and others with significant ability to advance strategic priorities. <b>BOARD, COMMITTEES, AND EXECUTIVE DIRECTOR</b></li> </ul>	<ul style="list-style-type: none"> <li>Restructure agenda and content of full-Board meetings to emphasize strategic focus over comm. reports. <b>PRES. &amp; EXEC. DIR.</b></li> <li>Encourage a culture of inquiry that welcomes fresh perspectives and challenge to support both accountability and innovation. <b>USE OF THE AGENDA AND MORE EXEC. DIR. COMM.</b></li> <li>Set an expectation that every Board member participate on a committee. <b>GOVERNANCE COMMITTEE</b></li> <li>Offer periodic Board experiences that deepen understanding of factors affecting the Preserve. <b>EXECUTIVE DIRECTOR</b></li> <li>Empower Board members to be more effective ambassadors and fundraisers on behalf of the Trust. <b>DEV. COMMITTEE</b></li> </ul>	<ul style="list-style-type: none"> <li>Establish a Governance Committee (in lieu of the current Nominating Committee) with a broad focus, including recruitment of Board members. <b>DONE</b></li> <li>Ensure that a Board committee supports every priority initiative. <b>DONE (SEE PRPOSED COMMITTEES)</b></li> <li>Populate Board committees to ensure Board leadership and relevant expertise. <b>GOVERNANCE COMMITTEE</b></li> <li>Document a charge/purpose, skills needed, and an annual work plan for each committee. <b>FIRST STEP - HAVE EACH COMMITTEE SUBMIT A DRAFT</b></li> </ul>	<ul style="list-style-type: none"> <li>Set aside time to review strategic plan progress annually with the intention of creating a new strategic plan every several years. <b>EXEC. DIR.</b></li> <li>Design a consistent Board member orientation process (i.e., review best practices of nonprofit leadership, a walking tour, and a review of key Trust information within an historical perspective. <b>EXEC. DIR.</b></li> <li>Refine by-laws to ensure alignment with contemporary decision-making practices as well as legislative compliance. <b>LEGAL (GIL AND ALEXIS)</b></li> <li>Recognize the need for an independent audit oversight function. <b>FUTURE CONSID.</b></li> <li>Conduct annual Board self-assessment to inform future Board development, focus &amp; activities. <b>GOVERNANCE</b></li> </ul>

Generating and managing greater resources			
Objective 3.2.1: Generate new financial resources for supporting operating, program, research, land protection, and capital projects.	Objective 3.2.2: Elevate the Trust's profile in the region and beyond.	Objective 3.2.3: Mobilize members and volunteers for broader engagement in supporting the Trust's mission and work.	Objective 3.2.4: Integrate operating, capital, and land protection needs, endowment income, and fund-raising initiatives into the financial planning process.
<ul style="list-style-type: none"> <li>• Enlist Board champions to collaborate with fund development staff. <b>DEV CO</b></li> <li>• Craft a compelling Case for Support for each and all uses of funds. <b>EXEC. DIR.</b></li> <li>• Invest in building relationships with major gift donor prospects. <b>DEV COMM &amp; EXEC. DIR.</b></li> <li>• Refresh membership program to increase engagement in the mission. <b>DEV (MARKETING)</b></li> <li>• Approach foundations to support discrete initiatives and capacity building and research. <b>EXEC. DIR.</b></li> <li>• Focus on building the <i>Strong Roots Society</i>. <b>DEV. COMM. &amp; EXEC. DIR.</b></li> <li>• Assess feasibility of launching capital campaign. <b>EXEC. COMM.</b></li> </ul>	<ul style="list-style-type: none"> <li>• Develop and implement a strategic work plan for branding, identity, marketing and communications. <b>DEV COMMITTEE (MARKETING)</b></li> <li>• Position the Trust as a thought leader in ecological restoration practices with members, educators, and scientists. <b>EXECUTIVE DIRECTOR</b></li> <li>• Enhance the Trust's civic and scientific presence in the region. <b>EXECUTIVE DIRECTOR</b></li> </ul>	<ul style="list-style-type: none"> <li>• Revamp the concept and promotion of gateways for each visitor's experience at the Preserve (e.g., Visitor Center, greenhouse complex, MontCo's Pennypack Trail connections)</li> <li>• Promote hands-on volunteer opportunities more assertively to targeted groups for specific projects.</li> <li>• Design communication strategies, including greater utilization of social media, to reach beyond current membership.</li> </ul> <p><b>ALL OF THE ABOVE ARE DEV COMMITTEE (MARKETING)</b></p>	<ul style="list-style-type: none"> <li>• Develop and maintain rolling, three-year capital and operating budgets as well as multi-year targets for endowments and reserves.</li> <li>• Refine the asset allocation of various funds to enhance endowment, general reserves, land protection reserves.</li> <li>• Refine endowment spending policies and monitor distribution against goals.</li> <li>• Strengthen forecasting models, including the interrelationship between revenue and expenses.</li> </ul> <p><b>ALL OF THE ABOVE ARE INVESTMENT &amp; FINANCE COMMITTEE</b></p>

Strengthening Trust infrastructure		
Objective 3.3.1: Enhance staff vitality through intentional human resources practices.	Objective 3.3.2: Maximize the value and use of key facilities throughout the property.	Objective 3.3.3: Enhance and prepare for an opportunistic approach to land protection.
<ul style="list-style-type: none"> <li>• Reconfigure the staffing structure to align with strategic plan objectives, and in consideration of David Robertson's retirement. <b>EXECUTIVE COMMITTEE</b></li> <li>• Increase staff capacity in restoration, stewardship, education, outreach, fund development, and communications functions. <b>EXECUTIVE COMMITTEE – EXECUTIVE DIRECTOR - FINANCE COMMITTEE</b></li> <li>• Establish a collaborative and consistent performance management system for the Executive Director. <b>EXECUTIVE COMMITTEE</b></li> <li>• Establish a consistent performance management system for staff, including individual reflection, goal setting, and the development of individual work plans. <b>EXECUTIVE DIRECTOR</b></li> <li>• Make professional development an ongoing priority, allocating funds and staff time to pursue opportunities. <b>EXECUTIVE DIRECTOR – FINANCE COMMITTEE</b></li> </ul>	<ul style="list-style-type: none"> <li>• Evaluate the current structures on the property for soundness and ROI of future renovations. <b>STEWARDSHIP COMMITTEE</b></li> <li>• Develop a multi-year maintenance plan for the historic bridges. <b>STEWARDSHIP COMMITTEE</b></li> <li>• Consider how to upgrade the Visitor Center/Greenhouse complex. <b>DEV COMMITTEE (MARKETING) – FINANCE COMMITTEE</b></li> </ul>	<ul style="list-style-type: none"> <li>• Re-evaluate the “watch list” of properties targeted for protection in the 2005 Master Plan and codify priorities for land protection based on the unique features of each property. <b>EXECUTIVE COMMITTEE – LAND ACQUISITION COMMITTEE</b></li> <li>• Document protocols for decision-making and financing, which would enable the Trust to act quickly when a priority property becomes available. <b>IN ORDER: LAND ACQUAITION COMMITTEE, FINANCE COMMITTEE, AND BOARD</b></li> </ul>

## IMPLEMENTATION

The Board has embraced strategic thinking, evaluation and monitoring as primary ongoing responsibilities. Innovation is inherent, and presumes that the Trust will use this Strategic Plan as a dynamic tool. In addition to annual reflection, as Year 3 approaches a major review will lead the Trust to either refresh this five-year plan or embark upon a fresh planning process.

### Key Targets and Performance Indicators

While every objective is intended to be measurable, and progress tracked, the Trust has identified targets and performance indicators as those measures that reflect the greatest transformation at the end of the plan's time period. Much of the evaluation and monitoring work will occur routinely since, going forward, the Strategic Plan will inform the nature and scope of staff reports to the Board as well as Committee and full Board meetings. An annual review of the plan will facilitate a thorough review of goals and objectives to assess progress and consider whether new objectives need to become priorities.

### Strategic Implementation Guide

The objectives and actions associated with each goal are included in a Strategic Implementation Guide along with a sense of timing and economic scale as well as the identification of lead responsible parties. Annual staff and Board committee work plans will be grounded in plan objectives and the specific actions.

### Multi-year Budget

A multi-year budget summarizes income and expense projections for the life of the strategic plan. A key factor in achieving some objectives is having the financial and/or human resources in place for planning as well as execution. The Trust will assess this budget annually in order to determine, particularly, the feasibility of undertaking large scale or labor-intensive projects.

### Communicating the Plan

The Trust's strategic thinking will be shared with key stakeholders, and the plan will be used as a basis for many of the Trust's communication messages, sharing plan highlights and notable updates. General communications will likely focus on what has been accomplished or planned while potential supporters also will learn about and be invited to support the Trust's aspirations.



## ADDENDUM

### Key Targets and Performance Indicators

While every objective is intended to be measurable, and progressed tracked, the Trust has identified key targets and performance indicators as those key measures that reflect the greatest transformation at the end of the plan's time period. Much of the evaluation and monitoring work will occur routinely since, going forward, the Strategic Plan will inform the nature and scope of staff reports to the Board as well as Committee and full Board meetings. An annual review of the plan will facilitate a thorough revisit of goals and objectives to assess progress and consider whether new objectives need to become priorities.

Ecological Restoration	Current	Year				
		Yr. 1 ('18)	Yr. 2 ('19)	Yr. 3 ('20)	Yr. 4 ('21)	Yr. 5 ('22)
# of parcels dominated by invasive plants						
# of acres dominated by invasive plants						
# of parcels needing afforestation (i.e., new forest)						
# of acres needing afforestation (i.e., new forest)						
# of forest gaps in need of restoration						
# of acres of forest gaps in need of restoration						
# of wildflower plots introduced in Raytharn Farm						
# of acres of wildflower plots introduced in Raytharn						
# of volunteer woody seedlings in vegetation monitoring plots						
% of stems damaged by antler rubbing/browsing in vegetation monitoring plots						
# of deer/acre						
# of deer harvested						
# of road-killed deer collected						

Next Generation of Stewards						
# of students involved in educational programs on site						
# of students involved in educational programs off site						

# of participants involved in programs						
# of volunteer StreamKeeper water quality monitors						
# of articles in peer-reviewed journals						
# scientific conference oral/poster presentations						
\$ invested in research						
\$ received via grants and earned income from government agencies						
% of abutting neighbors who are members/donors						
# of educational programs presented to outside affinity groups						

Remain Forever						
# of members						
# of stewardship volunteers						
# of stewardship volunteer hours						
# of volunteers (other than stewardship)						
# of volunteer hours (other than stewardship)						
# of major donors (\$5,000 and more)						
# of bequest intentions received						
# of unique website visitors						
# of Facebook likes, reactions, shares						
# of visitors						
operating budget						
\$ set aside for “ready” fund for land protection						
market value of endowments						