

*preserving the present for the future*

Crested Butte Land Trust



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## Detailed GOALS & OBJECTIVES

Addendum to CBLT's Strategic Plan 2011-2013



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## Addendum Note

This Addendum contains over 80 objectives relative to the six goals outlined in the Crested Butte Land Trust 2011-2013 Strategic Plan. We encourage you to read the Strategic Plan in its entirety, which is accessible on the CBLT website in conjunction with this addendum, at [www.cblandtrust.org](http://www.cblandtrust.org). Meeting the objectives will be used as a standard against which CBLT's performance is measured. This Addendum is a flexible work plan that is intended to be refined or altered as important strategic decisions are made, objectives are met, or important new developments unfold.

# Detailed Goals & Objectives

## **Goal 1. Increase the acreage of protected lands and increase our trail easements in Gunnison County.**

1. Identify and prioritize potential land acquisition areas of Gunnison County.
  - a. Objectives:
    - i. Identify the criteria for consideration and the areas.
    - ii. Perform a rank vote by the full Board.
    - iii. Evaluate results of the rank vote and endorse the prioritization.
2. Identify specific land and trail property acquisitions.
  - a. Objectives:
    - i. Update our existing Acquisition Selection Criteria and Checklist.
    - ii. Evaluate property acquisition targets within all prioritized land acquisition areas.
    - iii. Evaluate market listings and compare to target properties.
    - iv. Meet with and collaborate with appropriate individuals and community organizations to facilitate acquisitions.
3. Proactively obtain land and trail interests and access.
  - a. Objectives:
    - i. Take advantage of opportunistic market property availability.
    - ii. Proactively acquire properties identified in sub-goal 2 above.
    - iii. Adopt a multi-year program to improve signage on access trails.



Nathan Bilow

**Goal 2. Enhance the working relationships of the Land Trust with community organizations.**

1. Develop a set of “CBLT Key Messages” to consistently frame our communications with the community.
  - a. Objectives:
    - i. Identify a small number of Key Messages.
    - ii. Develop detailed talking points for each Key Message.
    - iii. Secure full Board approval of Key Messages and talking points.
    - iv. Establish Board expectations on how to use these Key Messages.
2. Systematically increase the frequency, effectiveness and diversity of Land Trust communications with the community.
  - a. Objectives:
    - i. Target 10-15 people per year and identify selective community organizations for face-to-face communication.
    - ii. Establish a periodic “Beer with the Board” program.
    - iii. Regularly invite questions and answers from attendees at development activities and from the annual CBLT cocktail parties.
    - iv. Submit a bi-monthly article to the CB News.
3. Develop and strengthen collaborative relationships with community organizations.
  - a. Objectives:
    - i. Regularly share e-mail communications with these organizations.
    - ii. Invite representatives from these organizations to attend CBLT meetings, events and activities.
    - iii. Meet with and review the new CBLT Strategic Plan with each of these organizations, as appropriate.
    - iv. Participate in the Ranching Roundtable Forum.
    - v. Network with Rocky Mountain Biological Lab to increase the amount of biological research on CBLT properties.
4. Increase community outreach.
  - a. Objectives:
    - i. Schedule an annual outdoor party that specifically celebrates the land and CBLT’s role in preserving it.
    - ii. Include funds for this event in the 2011-2012 budget.
    - iii. Invite a broad cross section of the community to attend with particular emphasis on a younger, more recreationally based crowd.
    - iv. Conduct an Annual Land Party event.
    - v. Expand the community outreach program with the Crested Butte Community School.
5. Upgrade the CBLT website to include more timely and proactive communications with the community.
  - a. Objectives:
    - i. Employ recommendations of the Website Improvement Project.

**Goal 3. Improve relationships with and develop a deeper understanding of the perspectives of the ranching community.**

1. Listen to the perspectives of the ranching community.
  - a. Objectives:
    - i. Identify a person on the CBLT Board or the Acquisition Committee to facilitate communications with the ranching community.
    - ii. Identify multiple means of meeting with and communicating with local ranchers.
    - iii. Strive to appoint a rancher to sit on the CBLT board.
2. Improve relationships with Gunnison Ranchland Conservation Legacy.
  - a. Objectives:
    - i. Network with GRCL to introduce CBLT board members to this group and to promote shared projects.
    - ii. Attend ranching community public events.
3. Recognize the impact of recreation on working ranches when considering all current and future acquisition projects.
  - a. Objectives:
    - i. Ensure that the revised and updated Acquisition Selection Criteria and Checklist contains this reminder.

**Goal 4. Enhance the Land Trust's Stewardship Program.**

1. Improve the effectiveness and professionalism of CBLT's Stewardship Program.
  - a. Objectives:
    - i. Increase CBLT's stewardship staff resources by 1) extending the 2010 summer hire on a part-time basis through the winter of 2011, and 2) hiring a full-time Stewardship Coordinator.
    - ii. Identify and prioritize key areas of Stewardship Program improvement.
    - iii. Select target improvement projects within these areas.
    - iv. Implement these projects.
    - v. Double the size of our summer stewardship volunteer pool from five to ten people.
2. Implement a Landowner Relations Program with landowners who hold property subject to a Land Trust conservation easement.
  - a. Objectives:
    - i. Secure input from existing land owners regarding their expectations relative to CBLT's stewardship and communications.
    - ii. Create Landowner Relations Procedures.
    - iii. Implement land owner communication and collaboration actions from the new procedures.



Chad Martens



Nathan Bilow

### **Goal 5. Improve the Land Trust's governance and management.**

1. Achieve Land Trust Alliance accreditation to demonstrate that we utilize national quality standards for protecting our important lands.
  - a. Objectives:
    - i. Complete the Land Trust Alliance accreditation process.
    - ii. Budget up to \$10,000 for a professional LTA facilitator to create new policy statements and help implement the proposed processes.
2. Examine, clarify and update CBLT governance and management policies and practices.
  - a. Objectives:
    - i. Appoint a standing Board Governance Committee.
    - ii. Create and approve a new Board Governance Policy which establishes the principle that the role of the Board is to govern and the role of the staff is to manage CBLT's affairs.
    - iii. Task the new Governance Committee with reviewing CBLT's Bylaws and considering which of our new internal policies should be moved to Bylaws.
    - iv. Task the new Governance Committee with the responsibility for board member and board officer succession planning.
    - v. Establish the principle of multi-year budget and resource planning.
    - vi. Adopt a bi-monthly Board meeting schedule.
3. Create a Board of Directors with more diverse backgrounds and skills.
  - a. Objectives:
    - i. Create and approve Board Member Recruitment Procedures.
    - ii. Increase Board membership to fifteen.
    - iii. Create and approve Board Member Orientation and Expectations Procedures.



Rebecca Weil

4. Adopt a set of principles and policies which establish appropriate Board member conduct.
  - a. Objectives:
    - i. Review and revise the “Legal Duties of Members of the Board of Directors” document and create a new “Board Member Code of Conduct” to define appropriate board member/staff interactions regarding work assignment and review.
    - ii. Create and approve an auditing process to allow for periodic assessment and feedback to board members on their behaviors and contributions to CBLT. This process should allow for Board self-assessment as well as Executive Director feedback to the Board on behalf of staff.
5. Improve board member continuing education.
  - a. Objectives:
    - i. Develop and approve Board Member Training Procedures for ongoing education.
    - ii. Identify a list of continuing education opportunities for board member consideration.
    - iii. Request each board member to identify and commit to selective training opportunities.
    - iv. Annually audit planned board member continuing education objectives versus actual training. Provide feedback to the Board.
6. Improve the functioning of the Land Trust standing Board Committees.
  - a. Objectives:
    - i. Create and approve separate charters describing the roles, responsibilities and authority of all standing Board Committees.
    - ii. Annually review Board Committee performance at the CBLT Annual Retreat.
7. Clarify the expectations for staff and volunteer personnel and ensure a continuing supply of qualified employees.
  - a. Objectives:
    - i. Create a new Employee Handbook incorporating existing job descriptions and defining staff and volunteer roles and responsibilities, duties, authority and working relationships.
    - ii. Create and approve Employee and Volunteer Recruitment and Training Procedures to attract, screen, hire and train full-time or part-time staff and volunteer employees.
8. Regularly review CBLT staff workload and resources versus CBLT commitments to prevent staff burn-out or excessive staff turnover.
  - a. Objectives:
    - i. Review during CBLT Annual Retreat. Include Board Committee and staff input.

9. Ensure ready availability of Land Trust documents to Board and staff to increase efficiency and effectiveness.
  - a. Objectives:
    - i. Identify the scope of the effort to convert all CBLT key documents to electronic format.
    - ii. Digitize all documentation.
    - iii. Develop a “Google docs” or similar system to allow on-line access to board members and staff.

**Goal 6. Improve the financial position of the Land Trust to further its mission.**

1. Increase CBLT’s Stewardship Fund from \$460,000 to \$600,000.
  - a. Objectives:
    - i. Reconcile the use, definition and policies regulating the Stewardship Fund to be in accordance with Generally Accepted Accounting Principles and in compliance with applicable legal requirements.
    - ii. Secure adequate funding from all new projects to cover closing costs and annual stewardship expenses plus add an incremental amount to the Stewardship Fund.
    - iii. Adopt a new policy statement that charges an initial 5% interest rate on monies fronted by CBLT to landowners or easement holders for due diligence until such lent funds are paid in full by the borrowing party. Dedicate supplemental revenues to the Stewardship Fund. Secure Board approval of this policy.
  
2. Reduce CBLT’s cumulative property purchase debt level from the current \$700,000 to \$350,000.
  - a. Objectives:
    - i. Sell selected non-strategic tactical properties (properties purchased for resale). Sales should consider market real estate conditions and value of the property.
    - ii. Ask neighboring property owners who benefit from CBLT acquisitions to assist with debt retirement.
  
3. Increase annual CBLT contributions (including revenue from fundraisers) from \$280,000 to \$450,000.
  - a. Objectives:
    - i. Effectively implement the multi-year Slate River Valley Fundraising Campaign started in 2010 to provide significant financial support for this goal.
    - ii. Expand CBLT’s active donor base from 1,700 to 2,500.
    - iii. Identify and select specific CBLT supporters to fund this goal.
    - iv. Establish and communicate specific target contributions from this group.
  
4. Increase non-acquisition grant funding from \$10,000 to \$50,000 per year.



Kurt Reise

- a. Objectives:
  - i. Increase annual non-acquisition grant submittals from an average of two per year to an average of five per year.
  - ii. Take advantage of conferences or other land conservation meetings to establish face-to-face personal relationships with grant funding sources.
  
5. Increase the commitment of the Board of Directors to support annual CBLT development (fundraising) activities.
  - a. Objectives:
    - i. Identify and recruit two new board members who can significantly expand the Board's fundraising capability.
    - ii. Create and approve new Board Member Development Responsibility Procedures.
  
6. Increase and improve the level of CBLT financial openness and transparency within the community.
  - a. Objectives:
    - i. Adopt a new policy stating CBLT's commitment to financial openness and transparency.
    - ii. Publish a simplified CBLT Financial Report and Balance Sheet in the annual Summer Newsletter.
    - iii. Task the Finance Committee with reviewing, updating and securing approval of CBLT's Financial Investment Policy. Utilize this new policy for all of CBLT's investment decisions.
    - iv. Adopt a new policy authorizing annual independent audits of CBLT's financial position.
    - v. Post CBLT's Financial Statement annually on the CBLT website.



Xavier Fane