

MADISON AUDUBON SOCIETY STRATEGIC PLAN 2019-2024

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Introduction

The purpose of the MAS strategic plan is to guide the organization toward a sustainable and productive future. The plan charts a course for the years 2019 to 2024, and will influence decision-making on priority actions that MAS will take to achieve its stated objectives and goals, and assess the effectiveness and impact of those actions.

In January 2018, a strategic planning committee made up of Madison Audubon board members, staff, and volunteers was appointed to guide the planning process. Members contributed to a broad, comprehensive, inclusive, and collaborative planning process. The planning committee met monthly during 2018 to meticulously draft a plan that was finalized in September 2018 and approved by the full board of directors in February 2019.

The primary components of the strategic plan are an organizational description with an emphasis on scope, targets, and key benefits and a formalized action plan with goals, strategies, objectives, tasks, and activities that focus on measurable outcomes. It is intended to be used to guide the work of board, committees, and staff. Narratives describing the rationale behind plan strategies are given in the public version of the plan. Annual review will be conducted by the strategic planning committee and board to adapt and expand plan activities and objectives as needed to achieve the organization's goals and mission.

Organization, Vision and Scope

Vision

A world in which there is respect for human well-being with a focus on the environment, birds, and other wildlife.

Mission

To protect and improve habitat for birds and other wildlife through land acquisition and management, education and advocacy

Geographic Scope

Southern Wisconsin, with a focus on Columbia, Dane, Dodge, Iowa, Jefferson, Richland, Marquette and Sauk Counties.

Conservation Target

Increased habitat for birds and other wildlife, including both the urban and rural environments of the region.

Benefits to Birds and Their Habitats

Vulnerability to climate change reduced, improved private land management, improved public land management, and better environmental choices

Action and Monitoring Plan

Our action plan includes the following components:

- **Theory of change** that lays out our assumptions about how each strategy we undertake will achieve the desired results to help us achieve the goal for our conservation target.
- **Strategies** made up of groups of **Activities** and **Tasks** that contribute toward anticipated outcomes that will result in increased benefits to birds and their habitats.
- A **Results Chain** diagram that depicts direct assumed relationships among discrete actions, intermediate outcomes, and the desired final impact. The diagram shows how plan strategies will contribute and interact to create important conservation benefits and ultimately lead to achieving the organizational vision.

Theory of Change

From 2019-2024, Madison Audubon Society will implement four major strategies that are directed at increasing habitat for birds and other wildlife in southern Wisconsin. The first strategy to ensure “Organizational Sustainability and Excellence” is a classic enabling strategy that includes actions to create the organizational conditions necessary for other MAS conservation efforts to succeed. If we implement the activities within this strategy, we expect that MAS will have:

- robust diverse & sustainable funding & financial resources,
- appropriate physical & personnel resources,
- infrastructure & administrative systems,
- regional credibility, strong information sharing, & consistent communication,
- strong board governance, policies and procedures, and
- support from a broad, diverse & engaged community.

If these results are achieved, then MAS will be able to successfully deploy three broad technical strategies aimed at enhancing human behaviors that will directly contribute to increasing habitat for birds and other wildlife in southern Wisconsin. The first of these MAS strategies is, “Environmental Education.” If the activities within this strategy are successfully implemented, we expect increased awareness, understanding and engagement by a diverse community that will in turn lead to three major outcomes including increased land ethic, increased public support for conservation program, and increased environmental engagement.

The second MAS strategy is, “Environmental Advocacy & Collaboration.” If activities within this strategy are effectively implemented, we expect that MAS constituents will be educated and

empowered, which will lead to increased public advocacy for conservation issues and results in beneficial policies being implemented and harmful policies being defeated.

Implementation of the third MAS strategy, “Habitat and Land Protection and Management,” is expected to lead to the following results:

- National Land Trust accreditation continued,
- Best management practices identified and implemented,
- Acreage of protected habitat increased,
- A sustainable community of partners protecting habitat expanded, and
- Diversity & health of native plant & animal communities on managed land improved.

The collective implementation of these MAS strategies is expected to result in these major results that will benefit birds and their habitats including, vulnerability to climate change reduced, improved private and public land management, and better environmental choices. Our assumptions are that these benefits will lead to habitat expanded and improved for birds and other wildlife in southern Wisconsin, which will collectively lead to MAS’s vision of a world in which there is respect for human wellbeing, the environment, birds and other wildlife.

Strategies, Intermediate Results, Activities, and Tasks

Enabling Core Strategy: Organizational Sustainability and Excellence

In order to successfully implement Strategies 1-3 in this plan, it is critical to enhance the organizational capacity, sustainability, and excellence of MAS through the following intermediate results: (1) acquire robust, diverse, and sustainable funding, endowment, and financial resources that support and expand capacity for programs, operations, capital expenses, land acquisition, and management, (2) maintain appropriate physical and personnel resources, infrastructure, and administrative systems, (3) maintain regional credibility through strong information sharing and consistent communication, (4) demonstrate strong governance, policies, and procedures, and (5) gain support from a broad, diverse, and engaged community.

Activity 1 — Execute a Fundraising Strategy That Meets Programming and Support Needs

A. Task: Ensure that the organization has appropriate fundraising staff with ongoing training for board and current staff members. (Ongoing; board and staff)

B. Task: Identify and cultivate new and ongoing major donors to support overall annual donations and planned giving. Targets include current and past major donors to MAS, new donors to the organization, and elevation of donation level of existing donors to major donor status. (Ongoing; staff and board)

C. Task: Develop and promote multiple highly-visible individual giving options to sustain the operation and growth of the organization. (December 31, 2024; board and staff)

D. Task: Continue and refine a thorough and transparent annual budgeting process. (Ongoing, Finance committee, board, and staff)

Activity 2 — Maintain and Build Long-term Financial Assets to Strengthen Organizational Capacity

A. Task: Maintain at least a 3-month operating reserve and work toward building the reserve to 6-months to improve the long-term financial stability of the organization, provide resiliency to varying economic conditions and changes affecting the organization's financial position, and ensure the ability of the organization to continuously carry out its mission. (FY2024, Finance committee, board, and staff)

B. Task: Promote and expand the MAS Legacy Society for planned giving. (Ongoing; staff and board)

C. Task: Strengthen endowment and invested funds to support the long-term stability and growth of the organization. Carefully explore and employ a diversity of investment approaches to strategically manage funds with appropriate asset allocation, distribution, and gift acceptance policy, which will facilitate planned giving and marketing, as well as maximize endowment fund revenue. (Ongoing; finance committee, board, and staff)

Activity 3 — Acquire and Manage Appropriate Organizational Infrastructure and Tools

A. Task: Develop and implement a long-term, adaptive plan that tracks infrastructure to promote adequate investment in capital renewal and replacement and expenditure levels for necessary maintenance. (Ongoing; staff)

B. Task: Obtain and utilize appropriate software programs and computer hardware to increase administrative efficiency, improve information sharing, strengthen development operations, enhance organizational functions, and assure IT security. (Ongoing; staff)

C. Task: Ensure appropriate office space that meets the current and near-future needs of the organization. (Ongoing; staff)

Activity 4 — Maintain Appropriate Staffing Levels

A. Task: Ensure competitive staff salaries and benefits. (Ongoing; board, executive director)

B. Task: Annually evaluate staffing levels appropriate to meeting programmatic needs and goals. (Ongoing; board, staff, and executive director)

C. Task: Ensure that staff roles and responsibilities are well-defined and that performance is reviewed at least annually by supervisors. (Ongoing; board, executive director, sanctuary managers)

D. Task: Identify and provide work-related training and other professional development opportunities for staff and volunteers. (Ongoing; board and staff)

E. Task: Complete and regularly update the MAS Employee Handbook and ensure compliance to its provision by all employees. (Ongoing; board, executive director)

Activity 5 — Implement an Effective and Adaptive Communications Network

A. Task: Assure consistent branding of MAS materials, which will aid communications and development. (Ongoing; board and staff)

B. Task: Maintain and update a compelling, user-friendly, and information-rich organizational website, which will support all aspects of the organization's needs. (Ongoing; staff)

C. Task: Continue to revise and implement newsletter strategy integrated with the organizational website to support improved communications. (Ongoing; staff)

Activity 6 — Maintain Credible and Effective Leadership

A. Task: Develop a leadership succession plan that will promote smooth leadership transitions, withstand unexpected departures, address board recruitment, and ensure organizational sustainability. (December 2019; board and executive director)

B. Task: Conduct an annual board self-assessment to allow the board to provide feedback on its collective performance, understand the extent of individual responsibilities, and take action to improve performance and satisfaction in governance. (Ongoing; board and executive director)

C. Task: Identify and provide access to professional development opportunities for board members. (Ongoing; board and executive director)

D. Task: Update the Board Leadership Handbook as needed and improve the board member onboarding process. (Ongoing; board and executive director)

Activity 7 — Maintain Land Trust Accreditation Standards

A. Task: Meet or exceed all Land Trust Alliance Standards and Practices to affirm the organization’s commitment to meeting national standards for excellence, public trust, and permanence of land conservation efforts. (Ongoing; board and staff)

B. Task: Address and meet “expectations for improvement” identified by the Land Trust Accreditation Commission and achieve renewal of Land Trust Accreditation. (September, 2024; organization as whole)

Activity 8 — Foster an Inclusive, Equitable, and Diverse Organizational Culture

A. Task: Identify barriers and pathways that make programs and sanctuaries more accessible to individuals of all abilities and cultural backgrounds. (Ongoing; board and staff)

B. Task: Reach out and provide pathways to MAS services and programs that are accessible to a broad spectrum of the community. (Ongoing; board and staff)

C. Task: Identify and provide ongoing training for staff and board members that develop competency in applying principles of equity, justice, and inclusion to MAS work. (Ongoing; board and staff)

Activity 9 — Promote Membership and Citizen Engagement

A. Task: Develop, execute, and grow events that will increase engagement with volunteers, members, and the community. (Ongoing; staff)

B. Task: Grow membership, member engagement, and volunteer participation. (Ongoing; board and staff)

C. Task: Provide learning and training opportunities for members and volunteers. (Ongoing; board and staff)

Strategy 1: Environmental Education

This strategy is directed at achieving the following intermediate results: (1) an increased land ethic (2) increased public support for conservation programs, and (3) increased environmental engagement, which will lead to increased awareness, understanding, and engagement by a diverse community. Results from implementation of this strategy will also contribute to the targeted intermediate results of strategies 2 and 3 in this plan.

Activity 1 — Provide Members and the Public with Outreach-based Education

A. Task: Provide both self-guided and instructional learning opportunities for sanctuary visitors to deliver high quality visitor experiences and promote increased membership and participation. (Ongoing; staff and sanctuary personnel)

B. Task: Continue to reach out to members and the general public through the “Evenings with Audubon” speaker series, which will support advocacy, general conservation education, public relations, increased membership and engagement, and collaboration with other organizations. (Ongoing; staff)

C. Task: Create and provide special events and trips, such as behind-the-scenes visits to the Chicago Field Museum, monarch tagging, and kestrel banding, which provide opportunities for members and the public to gain unique experiences and knowledge. (Ongoing; staff)

D. Task: Continue to improve an exemplary free field trip program that has consistent branding, coordination with field trip leaders, improved visitor experience and tracked attendance and which will provide a diversity of nature-based experiences for people of many ages, abilities, interests, and demographic groups. (Ongoing; staff)

E. Task: Provide educational materials through email and social media channels to promote the organization’s work and increase environmental knowledge and awareness. (Ongoing; staff)

Activity 2 — Provide Internships and Promote Volunteerism

A. Task: Maintain and expand internships as educational opportunities and that also provide conservation-based training and advance the mission of the organization. (Ongoing; staff)

B. Task: Promote sanctuary work parties for members and the general public that provide opportunities to assist with and learn about restoration, natural history, wildlife management, and field research. (Ongoing; staff and sanctuary managers)

C. Task: Engage members and the community in citizen science initiatives that enhance people’s understanding of the natural world and contribute to meaningful conservation projects. (Ongoing; staff)

Activity 3 — Provide Curriculum-Based Environmental Education

A. Task: Continue an exemplary environmental education program that serves school districts and community centers in our service area to improve access to environmental education and its benefits, particularly for underserved communities. (Ongoing; education director)

B. Task: Provide free, tested science-based curricula to the MAS community and general public through direct service and online content. (Ongoing; education director)

C. Task: Provide ongoing adult education opportunities, such as the “Audubon Naturalist Series,” for members and the public. (Ongoing; office staff)

Strategy 2: Environmental Advocacy and Collaboration

This strategy is directed at achieving the following intermediate results: (1) an educated and empowered constituency that will lead to (2) increased outcome-driven public advocacy for conservation issues resulting in (3) the implementation of state and local policies that benefit birds, wildlife and their habitats, and (4) the defeat of policies that harm birds, wildlife, and their habitats.

Activity 1 — Identify Key Issues to Focus Advocacy Efforts

A. Task: Promote an active Advocacy committee that will prioritize national, state, or local issues and potential partners to improve advocacy efforts MAS either leads directly (e.g., through meeting with leaders of government) or fosters through grassroots public activism. (Ongoing; Advocacy Committee and staff)

B. Task: Identify and maintain strategic advocacy partnerships and alliances to respond to emerging policy or advocacy issues as deemed necessary. (Ongoing; Advocacy Committee and staff)

Activity 2 — Provide the Public with Information on Key Conservation Issues

A. Task: Based on the recommendations of the Advocacy Committee, implement print, digital, or social media advocacy communications that educate, engage, and empower MAS constituents on key issues. (Ongoing; staff)

Activity 3 — Provide the Public with Advocacy Tools and Activities

A. Task: Based on issues prioritized by the Advocacy Committee, provide the MAS constituency with resources such as workshops and special advocacy training, engagement between members and legislators, and letter templates and advocacy toolkits. (Ongoing; staff)

Strategy 3: Habitat and Land Protection and Management

This strategy is directed at achieving the following intermediate results: (1) implementation of best management practices for sanctuary and other managed lands, (2) increased overall acreage of protected land, (3) an expanded sustainable community of partners protecting habitat, and (4) improved diversity and health of native plant and animal communities on managed lands.

Activity 1 — Adaptively Restore and Manage MAS Sanctuaries

A. Task: Engage and support the board-approved Land Protection Committee. (Ongoing; board and staff)

B. Task: Develop, enhance, and execute comprehensive sanctuary management plans for all properties that identify goals, practices, initiatives, and costs. (Ongoing; sanctuary managers and staff)

C. Task: Conduct baseline monitoring of plant/animal populations and other conditions and explore potential management strategies that may mitigate effects of climate change. (Ongoing; sanctuary managers and staff)

D. Conduct or facilitate research that will result in improved habitat and wildlife management, scientific knowledge, and public awareness. (Ongoing; sanctuary managers and staff)

Activity 3 — Pursue Strategic Land Protection Opportunities

A. Task: Identify potential land acquisition and easement opportunities that expand sanctuaries or create new sanctuary properties. (Ongoing; Land Protection Committee, board, and staff)

B. Develop and execute a capital campaign for land acquisition and stewardship

C. Task: Create and grow a fund for future land and easement acquisition and stewardship. (Ongoing; Land Protection Committee board and staff)

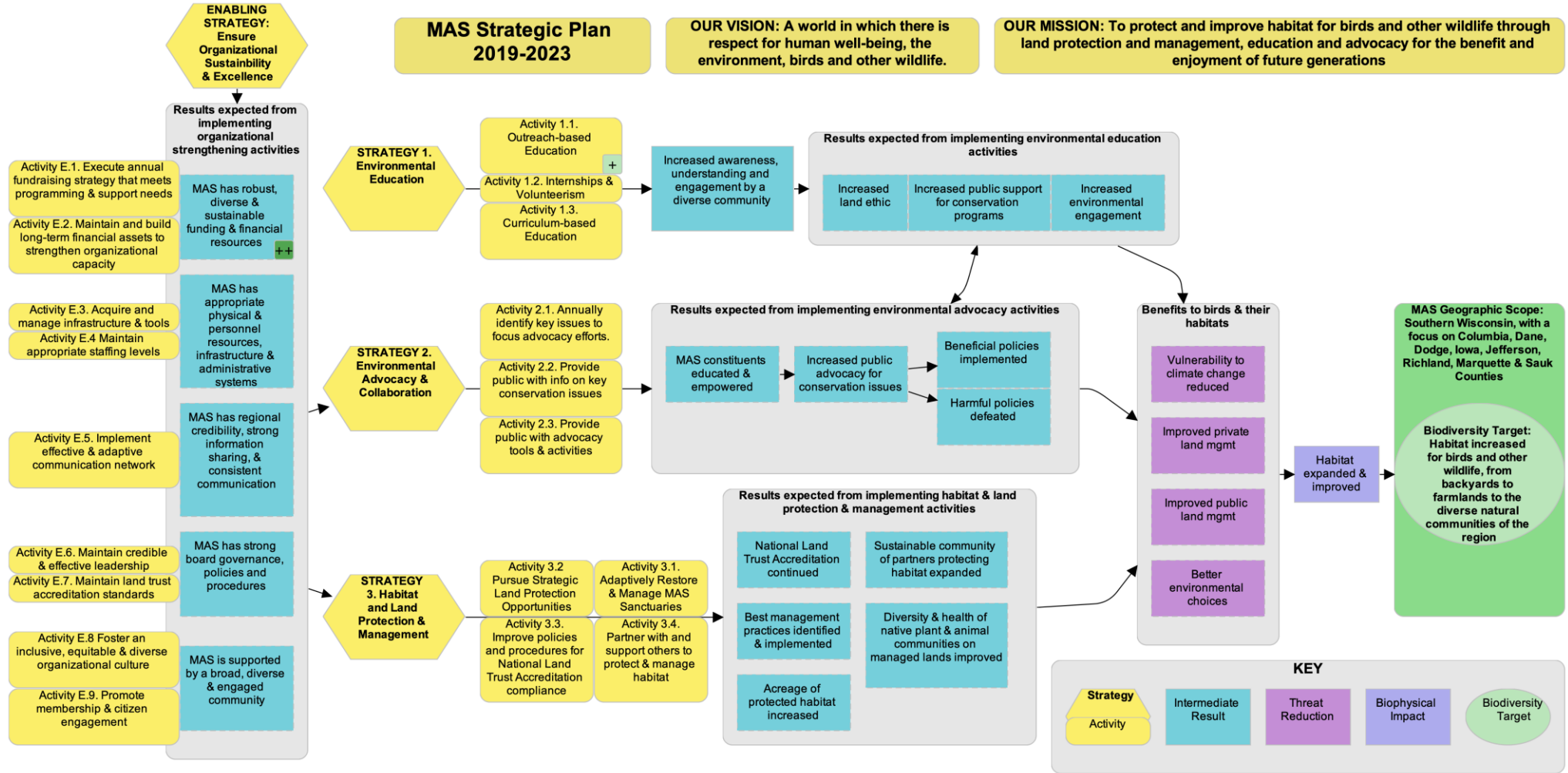
D. Task: Secure additional resources and endowment that will, both annually and in perpetuity, support the staffing, operations, and management of current and future sanctuary-based lands. (Ongoing; organization as whole)

Activity 4 — Partner with and Encourage Others to Protect and Manage Habitat and Wildlife

A. Task: Work collaboratively with state agencies, municipalities, nonprofits, other stakeholder groups, and individuals to protect, restore, and manage native habitats. (Ongoing; staff, sanctuary personnel)

B. Task: Provide training for landowners interested in restoring large tracts of habitat and provide demonstration sites at the sanctuaries for landowners interested in backyard habitat restoration. (Ongoing; staff, sanctuary personnel)

Strategic Plan Results Chain 2019-2024



Glossary

Accreditation

Land trust accreditation is a mark of distinction, showing that a land trust meets high standards for land conservation. Accreditation demonstrates that a land trust has successfully implemented Land Trust Standards and Practices. It is a voluntary program administered by the Land Trust Accreditation Commission.

Capital Expense

Use of funds or assumption of a liability in order to obtain, maintain, or upgrade physical assets owned or managed by the organization.

Conservation Target

An element of biodiversity, often a species or habitat/ecological system that an organization has chosen to focus on.

Diversity

The individual and group differences and similarities (e.g. values, personality, ability, race/ethnicity, culture, gender, gender identity, faith, socio-economic status, rank, and sexual orientation that all people carry with them in our community.

Endowment

An endowment is a fund made up money donated to or raised by a non-profit organization, which uses the resulting investment income for a specific purpose. Endowments are designed to keep the principal amount intact while using the investment income for charitable efforts.

Geographic Scope

The broad geographic focus of the organization.

Inclusion

Active, intentional and ongoing engagement within our community to create a culture in which we treat each other with respect and take action to maximize the potential of all community members.

Land Trust Alliance:

A national conservation organization that works to save the places people love by strengthening land conservation across America. The Land Trust Alliance represents more than 1,000 member land trusts, including Madison Audubon Society.

Legacy Society

A circle of individuals, partners, or families who have made planned giving commitments to support Madison Audubon's work.

Management Plan

A written document that describes current conditions of sanctuary properties and goals to preserve and/or improve the conservation values of the land.

Operating Reserve Fund

A balance at the end of the fiscal year sufficient to cover three months of operating expenses equal to unrestricted and undesignated assets, less current liabilities.

Opportunities

A factor identified in an analysis of the conservation problem that potentially has a positive effect on one or more targets, either directly or indirectly. This is often an entry point for conservation actions.

Planned Giving

A way to support non-profits that enable philanthropic individuals to make larger gifts than they could make from ordinary income. A planned gift is any major gift, made in lifetime or at death as part of a donor's overall financial and/or estate planning.

Theory of Change

Our MAS theory of change is the narrative for the strategies and outcomes depicted in the MAS results chain diagram.

Vision

A description of the desired state or ultimate condition that Madison Audubon Society is working to achieve.