

**Harris Center for Conservation Education
Strategic Plan
2007 – 2011**

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INTRODUCTION

We are pleased to present the 2007-2011 Strategic Plan of the Harris Center for Conservation Education. This document is the result of many hours of research, discussion and soul-searching conducted over a period of about 16 months.

During its 36-year history, the Harris Center for Conservation Education has engaged in strategic planning on a regular basis. The previous planning session, completed in 2000, sparked the capital campaign that resulted in the renovation, expansion and “greening” of our beautiful building. It also led us to a higher level of professional management and organization at both the board and staff levels.

With a solid organizational structure and inspiring facilities as our foundation, we launched the next strategic planning process in the fall of 2006. For the first time, we determined that this process should expand to include not just board and staff, but a wide spectrum of our friends, volunteers, supporters and strategic allies. We wanted to be sure that our plans for the next five years reflected the concerns of these key stakeholders.

As a result, board members conducted one-on-one interviews with 33 individuals to explore their views on the organization’s current effectiveness and hopes for the future. Then, in January 2006, we invited another 17 stakeholders to join the staff and trustees for a full day of strategic discussion, designed and managed by a team of professional consultants.

The messages from the interviews and discussions were surprisingly consistent in both their appreciation of the Harris Center’s strengths and in their suggestions for the future. We summarized the input into six main areas of focus and began work in committees to clarify the issues and explore the possibilities. After many months of hard work in committees and discussions at the board level, we agreed to a strategic approach to the next five years. In this document, you will find both summary and details on the plan as well as an accounting of progress already made.

**The Board of Trustees and Staff
Harris Center for Conservation Education**

EXECUTIVE SUMMARY

Mission

Our first conclusion is that our mission is as relevant and important today as it has ever been. The Harris Center's core "message" will remain essentially the same. We believe that we have a responsibility to ourselves and to later generations to:

- Use natural resources in a sustainable way
- Teach our children and the wider community about the wonders of the natural world
- Act in an exemplary way in maintaining and conserving our local environment

Financial Health

The Harris Center remains in good financial health through the continuing generosity of the communities we serve. We have been entrusted with substantial resources and we are committed to using them in responsible and productive ways.

Six Areas of Focus for the Future

Based upon our discussions and input from stakeholders, we believe that over the next five years we can enhance our services by:

- Updating our strategic approach to school programs
- Exploring opportunities for a greater role in adult education
- Evaluating the direction for the land conservation program
- Planning for succession of key staff and board leaders
- Ensuring appropriate care of staff and volunteers
- Broadening communications and outreach

I. Educational Programs for Youth

The planning process encouraged us to take a strategic look at our school and youth programs. In relationship to school programs, we examined the scope (geographic and grade level), funding strategy and delivery model. Key conclusions to date are:

Geographic Scope: We have determined that our resources can best be used by offering more intensive educational programs in the school systems we already serve rather than by reaching out to additional school systems. Deeper rather than broader, is the

watchword. Stoddard is the exception to the rule; we want to return to that community's school system.

Funding Strategy: At the same time, we believe that "our" schools and communities are now able and willing to share a greater proportion of the costs of our services; we have set a long-term goal of raising the schools' contribution to 25 % of cost. We hope to raise an additional 25% from local sponsors. The Harris Center will continue to fund the remainder of the costs.

Other Youth Programs: We also intend to make a greater educational impact outside of our schools through the continuation of Youth and Family and summer programs. These programs reach a broad audience and generate great enthusiasm for the natural world among young people and their families.

II. Lifelong Educational Programs

We were encouraged by our stakeholders to examine the opportunities for expanding our educational programs for adults, particularly older adults. In response, we will be testing two new programs specifically targeting adult learners:

Orientation Program for New Residents in the Monadnock region: This will be an annual program designed to introduce newcomers to regional environmental resources and issues as well as to the work of the Harris Center. We expect this program to be both a community service and a means of increasing the profile of and membership in the Harris Center.

Institute for Lifelong Learning: We are exploring the feasibility of establishing an Institute, largely self-directed, to coordinate more intensive adult learning about caring for and improving the local environment. This would be a once-a-week program, based on a very successful national model.

We also plan to make even greater efforts to reach out to the community through evening and weekend programs directed to a wide variety of interests and skills.

III. *Land Conservation*

Today, the Harris Center for Conservation Education owns or manages about five thousand acres in six local towns and, through easements, shares the ownership of another six thousand acres. With the exception of our headquarters building and about seven acres around it, all of the land we own and manage remains on the tax rolls and all of it is open to public access, free of charge, 365 days a year.

After a strategic look at the land program, we have agreed on the following:

- Our land trust activities will continue to be focused in the same local area. We will continue to acquire direct interests in conservation land in the six towns we already serve, largely through gifts.
- We have already taken significant steps to ensure that we have the staffing and financial capacity to carry out our stewardship responsibilities; this will be an area of focus over the next five years.
- We will also continue to support the efforts of other land trusts and government bodies in our region and state. Increasing regulatory pressure from tax authorities and “industry” standards will give us other opportunities to act in exemplary ways.

IV. Succession Planning

Many of our stakeholders have expressed a wish to see the Harris Center fully prepared for transitions in key staff. In response, we have created a board committee responsible for ensuring that leadership transition happens in a way that promotes the long-term health of the organization.

Our succession planning extends to the board of trustees, where we are focusing on development, orientation, leadership training and policies on term limits and officer selection.

V. Care of Staff and Volunteers

As a result of the strategic planning process, we have created a comprehensive employee benefits package and professional development fund to reflect our appreciation for the excellent work of our staff. We continue to work on a manual, clarifying policies and procedures for employees.

Over the next five years, we will be expanding and formalizing our volunteer process. We also plan to enhance our methods of recognizing their valuable contributions.

VI. Communications and Outreach

We recognize that the long-term health of the Harris Center depends in part on our ability to communicate clearly about our work and to expand our influence in the Monadnock region. We are in the process of developing specific strategies to help us:

- Create a sustainable communications and public relations effort. We are researching the feasibility of adding a staff person in the next five years dedicated to communications and possibly membership.
- Reach a broader audience with the messages of who we are, what we do and why it matters so that we can sustain and increase our membership for the long-term
- Convey our message in a more professional and compelling way
- Be more welcoming to newcomers on our trails and in our headquarters through user-friendly signs, maps and trail guides.

Details of Strategic Planning Discussions

Update Strategic Approach to Education

Members: Bill Berkeley, Roger Sweet, Susie Spikol, Jan Altobello, Laurie Bryan, Paula Flemming

1. How do we maintain the quality of our Educators and keep them at the Harris Center? Our Harris Center Educators are well-trained, are magnificent professionals, and are accepted in the schools and communities where they are loved. They work hard and have many demands on their time.

- *The Human Resources Committee is dealing with salaries and benefits for all staff. Some improvement has been made, but we acknowledge that the salaries do not yet match what our highly trained and dedicated staff deserves. Monies and time are designated for Staff Development opportunities.*
- *We are balancing the need for a variety of teaching opportunities for the Educators with what is working in the schools. We are piloting the Naturalist-in-Residence program to reduce fragmentation in staff schedules. This approach helps to focus energy at one site for a designated period and to provide a newness which has the potential to energize the staff. There is an effort to provide gradual training of part-time staff.*

RECOMMENDATIONS:

There be a scheduled review each year by the Associate Director and the education staff of the best practices and methods to deliver services in and out of the schools. The goal is to engage and to educate the students **and** to stimulate and to challenge the Educators.

The Human Resources Committee continue to explore salaries and benefits for all staff.

2. Are there geographic boundaries to our educational outreach? Should there be? Is there an optimal level of presence in a school? How do we decide to move on or to stay?

- *We subsidize the majority of the school programs. There are large financial implications for taking on new schools if we continue to subsidize the programs.*
- *Staffing implications need to be considered. How many educators (presently 6) can we handle?*
- *Options considered:*
 - *Serve only those towns in our historical core: Hillsboro High School; ConVal School District (Peterborough, Antrim, Greenfield, Bennington, Frankestown, Hancock, Temple, Sharon, Dublin); Jaffrey-Rindge School District; SAU 29 (Keene, Chesterfield, etc.)*
 - *Serve only those towns in the Monadnock region. This region may be defined as all of Cheshire County, southern Sullivan County and western Hillsborough County. This would include many towns in which we do not presently work and in*

which we have not worked. Distances would be greater possibly including Alstead, Walpole, Winchester, Deering, Milford...

- *Serve only those towns in which we have protected land (see map)*
- *Be open to all new opportunities in schools and in communities*
- *Inclusion of private schools, home schoolers ,and/or pre-schools in the defined outreach area*
- *Finances: See separate sheet “Costs of School Programs 06-07”*
- *Towns in which we presently work*
- *Currently all schools are asked to pay a minimum of 25% of the direct cost. The Harris Center subsidizes the balance.*

Costs of:

- *an additional elementary or middle school classroom = \$1350/year*
- *a high school classroom = \$6600/year*
- *Is this the right level of payment from schools?*
- *Should the charges be the same for all schools or be flexible based on newness with the Harris Center or ability to pay or...?*
- *How does the payment structure fit with our mission?*
- *Is it sustainable within the income potential from our annual fund, membership and investments?*
- *Should there be a different formula for charges for continuing and contracted programs and for one-time programs?*

Discussion:

We should include the Faulkner Elementary School in Stoddard since more than 60% of the land in Stoddard is in trust?

In order to meet our mission, it is important that we maintain a major presence in schools. After much discussion, we believe that the Harris Center will have greater impact if we go for more depth in a school rather than for breadth by including more schools. There are many other organizations which serve schools by giving only one lesson or program to a class or school. The Harris Center program is unique because of its continuing presence. Through the Youth and Family program, we can reach those towns which we do not serve through the school programs.

Currently we serve students in grades 2 through 5 and high schools in Jaffrey and Peterborough.

RECOMMENDATIONS:

- Add Stoddard as a school which we will serve at a cost of \$4500. We will strive to receive 50% of the cost from the school and from a community resource.
- Continue with the present schools in which we have programs, but extend the program to students in kindergarten through grade 12. (Cost per classroom is \$1350.)
- Continue to be open to opportunities to work in new schools

- Receive 25% of the costs from the school district and 25% from community support (individuals, businesses, Conservation Commissions, etc.); Harris Center supports the balance of 50%.
- For a new school, the Harris Center may support more than 50% of the costs of the program. We will work with them to find community funding and to increase the school contribution to fund 50% of the costs of the program. We want to reach this level of funding within two years.
- The Youth and Family program will reach beyond our school programs to home schoolers, private schools, etc.

3. The question periodically has been asked as to who our primary audience is in the schools. Is it the students or the teachers?

The answer to this question affects the planning and expectations of the Educators. If it were the teachers, after the Educators had worked with them for a while, the Harris Center program would move on to other teachers, thus changing every few years. If it were the students, the Educators would continue to work in the same classrooms helping those students develop and deepen their interest in the environment. We feel that our approach is egalitarian; we work with all students in the classroom not excluding any.

RECOMMENDATION: In schools students are our primary audience. Educators will continue to offer in-service opportunities for teachers and parents, knowing that our focus is the students.

4. Youth & Family

- *These programs occur in schools in which we presently work and in schools beyond our service area during and after the school day.*
- *Generally, there is a fee associated with a Youth and Family program which covers the costs.*

RECOMMENDATION: Youth and Family programs should continue since they serve an interested population which is within our mission. Youth and Family programs require having a staff person to service non-contracted requests when they occur. This person has the challenge of developing new programs; requires the flexibility to respond to requests; needs strong networking skills; and needs to be proactive in creating new opportunities for students and families.

5. Summer Programs: *The summer programs are working well, generate enthusiasm and income.*

RECOMMENDATION: Continue with the summer programs.

6. Volunteers in our educational mission:

Currently, we use volunteers for clerical and physical tasks to assist in the preparation of and maintenance of teaching material (cataloguing books, building storage units, driving for and helping with field trips). This works well, but we would like to draw upon the additional expertise of some of our volunteers.

RECOMMENDATION: Explore the development of a resource directory identifying areas of expertise of our members so that we could match students with a specific interest with a mentor.

7. Collaboration with other organizations:

We collaborate well with other organizations such as town Conservation Commissions, Arts Enrichment Program, Antioch, The Grapevine, the North Branch of the Contocook River Advisory Council, Southwest Regional Planning, Monadnock Conservancy, Antioch University, town officials, SPNHF, Conservation and Housing, and the Ashuelot Valley Environmental Observatory.

RECOMMENDATION: Continue our collaborative efforts and be open to new partnerships

8. What is the scope of responsibility of the Education Committee? Is adult education or lifelong learning a responsibility of the Education Committee?

“Education is the central theme of the Harris Center.” (Roger Sweet)

Discussion:

Meade has been providing the vision which looks at the whole of the Harris Center’s outreach. Assuming that Meade may not want to work forever, we think that it is important that the Education Committee strive to replicate Meade’s role in providing oversight and direction to all aspects of the Harris Center’s education work.

RECOMMENDATION:

There be one committee to provide oversight to all programs and activities which fulfill the mission of education. These programs or activities would include, but not be limited to, outings, family programs, adult education, seniors, courses, lectures, evening programs, pre-school and in-school programs. There will probably be a need for sub-committees to meet to discuss issues pertaining to a specific focus. A consolidation of responsibilities rather than a proliferation of committees will be easier to maintain considering the number of Board members, the number of standing committees and the staff responsibilities which presently exist.

- Staff responsibilities will be defined by the Associate Director who will report directly to the Board.
- The staff member who is responsible for the development and administration of a program will be a member of the Education Committee.

- The Education Committee will include Board members who have an interest and/or expertise in school, hiking and adult education programs
- The Executive director should be involved with the Education Committee to assist in the merging of the public programs and outings under the Education Committee umbrella.
- The umbrella concept for the Education Committee should be evaluated in one year.

SUMMARY OF RECOMMENDATIONS:

1. There be a scheduled review each year by the Associate Director and the education staff of the best practices and methods to deliver services in and out of the schools. The goal is to engage and to educate the students **and** to stimulate and to challenge the Educators.

The Human Resources Committee continue to explore salaries and benefits for all staff.

2. Add Stoddard as a school which we will serve at a cost of \$4500. We will strive to receive 50% of the cost from the school and from a community resource.
 - Continue with the present schools in which we have programs, but extend the program to students in kindergarten through grade 12. (Cost per classroom is \$1350.)
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 - The Youth and Family program will reach beyond our school programs to home schoolers, private schools, etc.
3. In schools students are our primary audience. Educators will continue to offer in-service opportunities for teachers and parents, knowing that the focus is the students.
4. Youth and Family programs should continue since they serve an interested population which is within our mission. Youth and Family programs require having a staff person to service non-contracted requests when they occur. This person has the challenge of developing new programs; requires the flexibility to respond to requests; needs strong networking skills; and needs to be proactive in creating new opportunities for students and families.
5. Continue with the summer programs.
6. Explore the development of a resource directory identifying areas of expertise of our members so that we could match students with a specific interest with a mentor.

7. Continue our collaborative efforts and be open to new partnerships.
8. There be one committee to provide oversight to all programs and activities which fulfill the mission of education. These programs or activities would include, but not be limited to, outings, family programs, adult education, seniors, courses, lectures, evening programs, pre-school and in-school programs. There will probably be a need for sub-committees to meet to discuss issues pertaining to a specific focus. A consolidation of responsibilities rather than a proliferation of committees will be easier to maintain considering the number of Board members, the number of standing committees and the staff responsibilities which presently exist.
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 - The umbrella concept for the Education Committee should be evaluated in one year.

Stephen asked, “What can the Board do to support the Educators?”

- Board members attend community meetings such as PTOs or school board meetings in their towns of residence with staff members showing support for the Harris Center program being discussed, sharing their expertise and presence at important meetings.
- Facilitate networking by introducing knowledgeable or influential people to the staff.
- Be familiar with the school programs. Observe some lessons in classes.
- Participate in outings.
- Be positive.
- Keep a focus on increasing salaries for all staff.

Human Resources- Ensure Proper Care of Staff

Committee Members: Peri Chickering, Sandy Greene, Paula Flemming, Laurie Bryan

Goal of this committee:

- To care for and address the short and long term needs of the staff, volunteers, and board.

Key issues for the staff:

- Retirement – The creation of a retirement plan for all employees
- Compensation
- Retention
- Training and development
- Employee manual
- Leadership succession (being addressed by a separate committee)

Overall Statement of Intent

Although the charge of this committee is to look after the needs of all human resources at the Harris Center, for the purposes of working with the issues raised in the strategic planning process, the central focus for the next twelve to eighteen months will be primarily on the staff. There are three other committees that will be addressing similar issues for the board, volunteers, and the longer terms needs of leadership succession.

Compensation, Retirement, and Retention

The most immediate need coming out of the strategic planning process was the issue of compensation, retirement, and retention of the excellent personnel that are drawn to work at the Harris Center. Because these three areas are very closely linked they were considered in terms of creating a package that would be fair and appealing to the staff. In the past there were issues about equity in terms of time and compensation. These have begun to be addressed and there seems to be a shift in this feeling perception and a sense of balance and fairness. To this end, the committee met separately and with staff to talk about their needs and concerns and to develop a more comprehensive compensation package. The following is a short list of the thoughts and concerns that arose from those conversations.

- Overall compensation package and benefits:
 - Perks - Like to work here because of mission, location, atmosphere, lots of support, camaraderie, flexibility
 - Down side – compensation: \$29,000/year versus teacher at \$40,000/year
 - Need to create a comprehensive and competitive compensation and benefits package, which will be continually revisited and upgraded in order to ensure that the Harris Center's offer is in line with organizations of similar size and mission

- Childcare options

RECOMMENDATION:

A comprehensive Employee Benefits package has been created and passed by the Board in June. Central to this package was the creation of a 403 (b) retirement plan has been put in place with New England Wealth Advisors. This plan will be voluntary and include both employee contributions that would be matched, and an annual contribution decided upon by the board each year (see exact details of the plan below). A meeting has occurred with all the staff to go over the Employee Benefits package, answer any questions, and encourage people to take advantage of all the options that are being provided.

Training and Professional Development

The committee met with the staff to talk about the area of professional development in order to get a sense of what is working/what is not and how to ensure that staff are aware of the funds allocated each year for their own use. The following were the ideas that came out of these conversations:

- Ongoing commitment of funds professional development
- Acknowledgement that professional re-certification is covered by the Harris Center
- Assist staff to think “out-of-the box” in terms of how to use these funds: personal retreats to reflect, professional attire needs, resources for themselves, etc.
- Look at creative ways to make use of the staff days - 1st Monday of each month
- Take off a day/actually schedule time for professional development

RECOMMENDATION:

Continue the commitment of professional development funds each year and ensure that the staff are actively using these funds in ways that are of most value to them.

Employee Manual

The development of an employee manual of the Harris Center’s policies and procedures relative to being a staff member has been occurring in bits and pieces over the last several years. The creation of a simple, informative, and accurate employee manual is the goal. The intention is to have this manual completed within the next year. There are several local resources available to assist with a template that could be used as the foundation for creating this manual. The various options are currently being explored and a decision will be made about which resource to use in early 2007.

Ongoing work over the next three to five years:

The main goals of this committee in terms of short terms issues to address will most likely be complete by March 2007. At this time the committee will most likely remain intact in order to deal with periodic issues as they arise but will not need to meet on any kind of ongoing or

regular basis. The only exception to this would be the need to keep an eye on the compensation and salary figures and compare those with the industry standards for organizations of our size and kind to ensure that the Harris Center is keep pace with the competition.

Explore Opportunities for Lifelong Learning

Members: Bill Berkeley (Chair), Meade Cadot, Peri Chickering, Stephen Froling, Francie Von Mertens, Mary Day Mordecai, Susie Spikol

Introduction

The Lifelong Environmental Education Committee (LEE) was formed in response to the findings of The Harris Center's Strategic Planning Day. A strong message from Harris Center stakeholders that day was that, as it looked to the future, The Harris Center should become much more involved with educational programs and experiences which involved adults, and most particularly older adults. Different individuals and different groups advocated this future direction for The Harris Center for different reasons. Here are the most compelling:

- Over the past several decades, we have seen the lifelong learning movement engage increasing numbers of adults in a wide variety of learning experiences. Education is no longer "wasted on the young" -- it is attracting a rising tide of adult learners.
- The demographics of the country clearly reflect a continuing movement toward an older population, particularly toward those who will become 60 years or older over the next couple of decades. So, the "graying of America" creates a Willy Sutton situation. Just as Willy robbed banks because that was where the money was, so should The Harris Center begin to increase its emphasis on adult education because that's where the students are.
- In a time of increasing alarm about a wide variety of environmental issues -- global warming, water pollution, over-development, preserving the land, etc -- a sector of the electorate which is diligent in its voting habits and particularly concerned about environmental issues will be more inclined to make better and more sensitive choices on these issues.
- Having more adults becoming more personally engaged in the work of The Harris Center will increase the likelihood of additional acquisitions for The Harris Center's land preservation program and of overall support for its work in general.

So, it was with considerable enthusiasm that the LEE Committee began its deliberations about the most promising ways The Harris Center could begin to involve an expanded number of adults in a wider variety of educational activities.

New Program Initiatives

The Committee thought its new initiatives ought to be to be focused on two carefully chosen new test programs specifically targeted at adult learners. They would be intentionally designed to have a number of positive secondary impacts on the work of The Harris Center and to give The

Harris Center valuable experience in educational programming for adults. The Committee also was aware of the extreme limitations on resources and staff, so it felt that it would be prudent to start modestly, with the programs which were the most appealing, which would have the greatest impact, and which would require the fewest additional resources.

A Program for Newcomers to the Monadnock Region

The first program would be an annual event aimed specifically at newcomers to the Monadnock Region. If successful, the program could be expanded into semi-annual or even quarterly events. We thought it would be enormously helpful to the long-term health of The Harris Center if one of the first things newcomers to the region received was an invitation to come to The Harris Center to learn more about the environmental issues of greatest importance to the region. Get to people before they become involved with and committed to other organizations and causes in their communities. We left open the exact design of the "program", other than it should include a detailed and, hopefully, compelling introduction to the work of The Harris Center. It would also provide basic information about some number of environmental issues of particular concern to the Monadnock region -- including invasive plant species, natural resource protection through land conservation, water pollution, wise land use practices -- as well as lighter topics such as the best hiking trails, where to find the best blueberries, the location of hidden swimming holes.

We hoped a very targeted mailing list for the program could be assembled by having individuals associated with The Harris Center -- Board, staff, key volunteers -- actually go to the town halls in the towns in which they live to get the names and addresses of those families which had moved in during the past year. An informal test of this methodology by a number of Committee members was successful -- the names and addresses of new residents are easily available at town halls within the region.

The obvious expectation for this annual program would be that a welcoming and engaging introduction to the work of The Harris Center specifically for newcomers to the region would, over time, significantly increase the profile and the membership of The Harris Center, as well as provide newcomers with early access to the variety of educational experiences offered by The Harris Center.

The Wednesday Institute for Older Adults

A second pilot program would be aimed at older adults, a group specifically singled out during the Strategic Planning Day discussions as a particularly desirable target audience - given their rapidly growing numbers in the region, their special interest in the environment (older adults tend to be disproportionately represented in the memberships and as key volunteers of environmental organizations) and the time they have available to do "good works".

We called this The Harris Center's Wednesday Institute (could be Monday or Thursday or....). The "Wednesday" indicates that it will be an on-going, once-a-week program. And we just liked the word "Institute" as connoting a serious educational activity.

This program would be an adaptation of a very successful national model in which a group of education-minded older adults forms an organization and establishes an affiliation with a local college or university. The organization is largely self-directed, has members, by-laws, officers, and working committees and, in effect, manages a mini-college for its older adult members within the administrative structure of the sponsoring college or university. Course offerings are those you would find in the course catalogue of any liberal arts college or university. A curriculum committee decides what courses should be offered and who should teach them (often the faculty are retired teachers from the local area or even members of the organization who have expertise and passion in appropriate areas of interest). A budget committee manages the finances of the organization (and determines what the membership dues will have to be to bring income into balance with expenses). There are other committees as needed -- publicity, special events, membership -- to provide the administrative support needed to sustain the enterprise. All these committees are staffed by volunteer members of the organization.

By coincidence, these organizations are known generically as "Institutes" because, among the early leaders of this "movement", the word "Institute" often appeared in the title of the organization (The New School Institute for Retired Professionals, The Harvard Institute for Learning in Retirement, The Institute for Lifelong Learning at Dartmouth College). There are about 500 of these Institutes around the country with a total of around 250,000 members. Most Institutes are affiliated with a mainstream college or university. Many are affiliated with a community college. Some associate themselves with a senior center or a senior housing complex. A very few are stand-alone organizations with no institutional affiliation. As far as we can determine, there are no Institutes which have associated themselves with environmental study centers, but given the very active interest so many older adults have in the environment, we believe this is a promising program model for The Harris Center to test.

The way we propose to pilot this idea is to form a Steering Committee made up of interested board members and others who are closely associated with The Harris Center. The Committee will discuss in greater detail the best way to get an Institute up and running at The Harris Center. Then, from within the membership of the Steering Committee and from among their older adult friends, an Institute Organizing Committee will be formed. It will be the responsibility of this committee to bring together a larger number of older adults to The Harris Center for an organizing meeting which should result in the identification of a cadre of especially interested older adults who will provide the leadership for organizing and founding The Harris Center Wednesday Institute.

The Institute model is particularly appealing on a number of counts. Because it is, in effect, self-managed, it is not an expensive or staff-intensive program to run. The self-managing aspect of the Institute should make it a valuable source for The Harris Center of particularly strong, self-starting volunteers, possible Board candidates, major donors and land program prospects.

Evening and One-Day Programs

Expanding Programming Partnerships

For some time, The Harris Center has offered a variety of short programs in partnership with other organizations. Recent examples would be:

- with The New Hampshire Fish and Game Department, a workshop on Access and Use of "Coarse Filter" Critical Habitat Maps. .
- with the UNH Co-op Extension, a workshop on Wildlife Inventories for the Private Landowner.
- with The Society for the Protection of New Hampshire Forests, a workshop on Conservation Easements for realtors in the region.

We recommend that The Harris Center expand its strong array of existing partnership programs. The New Hampshire Association of Conservation Commissions would be an example of another potential programming partner, with strong liaison potential to local Conservation Commissions.

Adding "Off-the-Shelf" Partnership Programs

As it happens, there are a number of other organizations which offer workshops which can be brought to a facility such as The Harris Center. For instance, The New England Wildflower Society (NEWFS), in addition to the programs they offer at their home in Framingham, Massachusetts, also offers educational programs throughout New England. As an example, on July 8, they are offering a workshop on forest ecology titled "Forests Are More Than Just Trees" in collaboration with the Cardigan Mountain 4H and presented by Tom Lee from UNH and Lionel Shute from NH Natural Heritage Program. The NEWFS catalog of workshop offerings is impressive, with a wide range of interesting and appropriate topics. There may be other organizations which offer appropriate and appealing "off-the-shelf" programs which could be held at The Harris Center.

Harris Center Short Programs

For years, The Harris Center has offered evening programs on such subjects as wildlife (wolves, raptors, bears) and the arts (music, poetry, the visual arts). These programs have been free, well-attended and present a very positive image of The Harris Center to the general public. These programs need to be maintained, even expanded, as The Harris Center proceeds with the new initiatives suggested in the two previous sections.

In general, the Committee is aware that evening and one-day programs or workshops offered by The Harris Center either on its own or in collaboration with other organizations are popular, well-attended and help raise the profile of The Harris Center in the region. As we attempt to

expand the number and variety of these kinds of programs, there may have to be a modest charge for some of these added workshops -- especially if they extend for a full day or involve a speaker/leader from another organization. This is a practice The Harris Center has tried to avoid in the past. The Committee suggests that The Harris Center explore whether instituting a small charge for some short programs will have an adverse impact on attendance. If it does not, this would be a promising direction for The Harris Center to take, with the increased revenue offsetting the cost of the additional programming staff needed to support an expansion of the various kinds of evening and one-day programs.

Improving the Outings Program

Besides single event workshops, the other major activity The Harris Center presently sponsors for adults is its calendar of outings. The Committee noted that, within the array of outings presently offered, there is a great deal of variety. Some have leaders who are naturalists with a high level of expertise and who make the outing an intensive educational experience. Others are led by volunteers who are more interested in sharing the "sense of place" where the outing occurs. Some outings are very fast-paced and strenuous, others much more leisurely. And, of course, the outings can be placed on a spectrum -- with every possible combination and variation within these extremes.

In general, while acknowledging that there seems to be a ready audience for the more "athletic" outings, the Committee would favor a conscious effort to include an increased number of outings with a stronger and richer interpretive component, both through talks which precede outings and by assigning interpretive guides to more outings. There also was considerable interest on the Committee in doing more to train our volunteer outing leaders in various aspects of leadership. How to provide responsible and engaging leadership for an outing is not entirely an intuitive skill. It was the Committee's sense that our outings leaders would enjoy and be receptive to an interactive "best-practices course" in how to lead a well-organized and engaging outing, as well as to a more thorough orientation to the full range of activities offered by The Harris Center.

Finally, the Committee would like to see an improved differentiation in the outings calendar descriptions concerning what kind of outing a person will experience if he/she signs up. How much interpretive material will be offered? How physically rigorous will the outing be? Would it be suitable for children as well as adults? These questions are often addressed in our present outings calendar, but not always clearly and consistently. We believe we can improve significantly in this area, ensuring that participants will know in advance what they will get in terms of an outing experience and will be more likely to enjoy it (and to sign up for additional outings).

Board Committee Structure

The Harris Center Board of Directors provides oversight of Harris Center activities through the appointment of standing committees of the Board -- the Budget Committee, the Human Resources Committee, the Education Committee. If the Board approves our Committee's

recommendation that The Harris Center expands its programs and outings for adults, then we must ensure that these activities have appropriate Board oversight. There seemed to us to be two choices. We can expand the jurisdiction of the present Education Committee, which has been concerned exclusively with The Harris Center's in-school programs for young students. Or, we can establish a separate committee (a new Program Committee?) charged with the oversight responsibility for all programs aimed at an adult audience. There would, we believe, have to be the occasional exception to the usual youth/adult division of responsibilities between these two committees -- for instance, we would think that the current effort underway to provide a teacher certification program for the schools in which we work is an adult program which would more appropriately belong under the Education Committee, just as hikes which are attended primarily by youngsters would belong on the Program side. Our sense is that the two kinds of activities are sufficiently different to warrant having two committees, but we don't have strong feelings on this issue. We are only committed to having Board oversight for all Harris Center educational programs -- those involving children and adults.

Conclusion

The Lifelong Environmental Education Committee hopes that our recommendations provide a sound and well-reasoned platform for The Harris Center to begin to respond to the exciting opportunities inherent in sponsoring a wider variety of educational offerings for adult learners.

Summary of Recommendations

- 1) Initiating New Programs by
 - a) starting a program for families new to the Monadnock region.
 - b) establishing a "Wednesday Institute" for older adults.
- 2) Expanding Present Evening and One-Day Programs by
 - c) finding new program partners with whom to create additional short programs.
 - d) finding new program partners who can provide appropriate and appealing "off-the-shelf" programs.
- 3) Improving Harris Center Outings by
 - e) providing standard, accurate descriptive outings information to potential participants.
 - f) maintaining an emphasis on the interpretive element of Harris Center outings.
- 4) Improving Board Program Oversight by either
 - g) establishing a Board Program Committee to oversee Harris Center Programs not aimed at young people or held in local public schools.
 - h) expanding the jurisdiction of the Education Committee to include non-school programs.

Clarify the Next Steps in the Land Program

Committee Members: Lee Baker, Dave Birchenough, Meade Cadot, Paul Faber, Charlie Faulkner, Stephen Froling, Sandy Greene

[This initial version of this report was originally considered by the Board in June 2006. Between that time and its publication, (i) the text has been amended to reflect concerns of the Board and changing circumstances and (ii) various recommendations have been implemented.]

The Committee addressed the following questions:

- 1 Is our acquisition focus correctly stated - as to geographic area and purposes - in the Focus document?
- 2 How do we distinguish ourselves from other land conservation organizations operating in our region? What is our distinctive "character"? What added value do we provide? Should we be seeking additional/different "partnering" arrangements?
- 3 Are we sufficiently aggressive in land acquisitions? too aggressive?
- 4 Stewardship questions (easements, forestry management, trails development and maintenance, etc.):
 - How do we staff it?
 - How do we pay for it? (e.g., current revenue, timber sales, restricted endowment, general obligation)
- 5 What happens once the land program matures, that is, we can no longer acquire land (or interests in land) within our focus area?
- 6 Can we provide added protection to our fee-owned land?
- 7 Can we use our land in other ways to further our mission?

The Committee reached the following conclusions:

Questions 1 and 2:

The Harris Center is a local land trust whose land trust activities are important in their own right but primarily support its educational mission.¹ Although there are a number of other land trusts

¹ The Land Trust Program is important in its own right:

Habitat preservation is the weak link, the point of greatest vulnerability; if habitat is not preserved, all the education in the world will not ultimately benefit wildlife

Habitat preservation is working – it is a successful program; note recovery of umbrella species (esp. black bear) on Harris Center owned, protected and inspired land on our doorstep

active in the general area, none of them have these characteristics; thus, all of them have a mission other than general education and all have a less specific geographic focus.²

Holding land “locally” serves our educational purposes well in that the land we have can readily be used for educational purposes.

Habitat preservation is at the heart of our mission – As early as 1985, the Harris Center made a board-level commitment to land protection as part of its mission. Since that time, our donor base has made its contributions in light of that commitment.

The Land Trust Program supports the education mission:

Teaching by example – If we want to spread the message about the benefits of habitat protection, what better way than to implement the message in a practical tangible way which works?

Raising Funds – The fact is that more funds are raised through land protection than are spent on land protection; the balance subsidizes our other programs

Teaching Laboratory - We use the land we own and control as a venue for teaching and as an example of successful management for:

- Preschool and school aged children – *It’s a lot easier to have a sense of wonder after seeing a live raptor in free flight or a caterpillar on a milkweed than seeing the same thing in a book!*
- Graduate students – *We have a long-standing relationship with Antioch and others, enhancing their professional training.*
- Landowners – *Landowners learn from us, both when we have an easement relationship and when they observe what their neighbors are doing.*
- Environmental professionals – *The Harris Center has a reputation among New Hampshire professionals for doing things right and serves as a model for land trust activities in our region and elsewhere.*
- The general public

² Other organizations active in this area include:

- i. NGO’s
 1. Regional – Monadnock Conservancy (36 towns of the SW NH region)
 2. Statewide – SPNHF, NEFF, NH Audubon
 3. National – Audubon, Nature Conservancy, Trust for Public Lands
 4. Multistate – Q2C [an action group, not an “owner”]
- ii. Public
 1. Towns, often via Conservation Commissions: Hancock, Nelson, Stoddard, Peterborough, Harrisville, Dublin, Bennington
 2. New Hampshire – NH F&G, Keene State
 3. US – Army Corp of Engineers

Concentrating our land protection activities “locally” also underpins a substantive message about the importance of “clustering” – that is, creating larger blocks of protected land out of smaller ones - one of the central messages we teach about land preservation.³

Being a “local” land trust provides substantial cost savings in that our limited staff can monitor our land holdings with minimal travel, we hear of land availability “through the grapevine” and we depend heavily on a local reputation among landowners who know us through our other activities.

Additionally, the regional needs for land preservation outside the SuperSanctuary area are well served by other organizations.

Both inside and outside our immediate area, the Harris Center has always supported the activities of other organizations with compatible aims. It is part of the Harris Center “ethos” that it doesn’t matter who protects the land; it is the protection itself which matters most. In line with this philosophy, prior to entering into any land protection activity, we routinely consider whether ad hoc “partnering” arrangements are appropriate, either to obtain financing or for better management of the project. These considerations have led to numerous ad hoc co-operative arrangements with nearly all of our “competitors.”⁴ As a result, we believe that we have “open”

⁴ To take recent examples:

The Kulish Forest, 120 acres in Hancock, was acquired in early 2006 at a market price by SPNHF with funds largely provided by the Harris Center and a smaller contribution from Hancock Conservation Commission. Hancock holds an easement and the Harris Center holds a back up. This parcel requires active forestry management on a parcel adjacent to land already owned by SPNHF, which SPNHF can best provide;

The Monadnock Conservancy obtained easements on seven parcels near Silver Lake in Nelson and Harrisville in late 2005 and early 2006 which were “encouraged” by the Silver Lake Association; the Harris Center holds back up interests on these parcels as part of a long-term understanding.;

A couple of years ago, the Center advanced to NH Audubon a gift of \$40,000, the downpayment Audubon needed immediately to purchase the Tamposi land, about 365 acres in southwest Antrim.

The Center is now involved with a multi-party transaction to acquire 1,617 acres near Robb Reservoir in Stoddard. This is actively supported by the Trust for Public Lands, NH Fish & Game, US Fish and Wildlife, USDA Forest Legacy Program, NH LCHIP and a number of other organizations and builds on substantial earlier work of NH Audubon and SPNHF.

arrangements with all of the conservation organizations in our region in which it is easy to discuss common goals and to work toward common solutions on individual projects.⁵

We recognize the importance of maintaining both the “ethos” and the relaxed and co-operative arrangements with other organizations. Continuing these practices greatly enhances our ability to achieve our long-term objectives.

At the same time, we do not believe that it is necessary or advisable at this time to cede control of the important elements of our land program – acquisition policy, financing, marketing, actual acquisitions, land stewardship, easement management, etc. – to any group or body which we do not control or which we control jointly with another organization.

RECOMMENDATIONS:

1. Although we see no reason to make major changes in our geographic focus, we do recognize that there might be some areas on the periphery which ought to be reexamined from time to time. If there are nearby natural barriers or nearby areas in which other organizations have a natural sphere of influence, we could expand to meet those.
2. We should continue to seek out ad hoc opportunities to cooperate with others but see no reason at the present time to enter into a long-term strategic alliance with another organization.

Question 3

In discussing this question, we realized that we do not have a convenient yardstick to measure a rate of progress. By any standard, the land trust activity has been an enormous success, starting with 7 acres of land in 1982 and protecting – one way or another – about 9,000 acres today (plus assisting with many third-party projects along the way). Although some organizations use “number of acres protected per year” as a metric, we do not believe that is an appropriate standard for us. Nor do we have a good numerical alternative since we are now looking more to linkages between protected spaces and protecting entire habitats over the lifetime of certain umbrella species.

We also realized that we do not have a systematic way of ranking properties according to our own priorities. Hancock, which carried out such an exercise and has published its results, has discovered that use of such a system can be a basis of explaining to owners the environmental importance of their property and thus can be influential in inducing owners to grant easements.

⁵ In his “strategic planning” interview with us, Dick Ober (the chief executive of Monadnock Conservancy) noted that he especially valued the “collaborative nature” of the relationship between the two organizations.

RECOMMENDATIONS

1. We should devise a system for ranking potential conservation properties using our own priorities. The results of this work should be reflected on a map.
2. We should consider appropriate methods to contact high priority land owners and track our efforts.
3. We should explore additional methods to promote land protection, including new literature, mailings, and other outreach.

Question 4

We are presently reliant on volunteer help to steward, monitor and maintain our land and easements. Only Meade serves as paid staff, and even he is on a part-time basis for this work.

- Stewardship of fee owned properties consists largely of forestry activities which are carried out by a professional forester who is compensated at market rates as a percentage of timber harvest. In our view, this is sustainable for the indefinite future.
- Trail maintenance is carried out by volunteers, both at the supervisory level (Jim Orr) and as volunteer labor. This, too, is likely sustainable, although finding someone with Jim Orr's skills and dedication may pose a problem.
- Monitoring of easements is, and has been, conducted by Antioch NE graduate students as part of a practicum program. The work is supervised by Meade and is typically performed to a high standard. This model may not be sustainable if we lose Meade's personal connection with Antioch NE. We have only a rough idea of how many hours this work actually takes at present. We pay only limited mileage. This model may not be sustainable indefinitely and requires further thought and planning.

We are under pressure to demonstrate such sustainability in concrete terms from two sources, in addition to our own strategic planning.

- First, the Internal Revenue Service recently modified the instructions to Form 8283, the IRS form which a donor must complete to obtain a tax deduction for donation of, among other things, a conservation easement. "The donee must be a qualified organization as defined in section 170(h)(3) and must have the resources to be able to monitor and enforce the conservation easement or other conservation restrictions." [Emphasis added.] We are not able to find any further definition of "resources" as used in this passage (and could certainly make arguments that we have such resources), but questions may be raised as to whether such resources must be cash or other assets and whether they must be segregated for this purpose. The consequence of failure in this respect is denial of deductibility to our donors and, ultimately, possible revocation of our charitable status; and

- Second, the Land Trust Alliance Standard 11A requires adherents to meet the following standard: “The land trust determines the long-term stewardship and enforcement expenses of each easement transaction and secures the dedicated or operating funds to cover current and future expenses. If funds are not secured at or before the completion of the transaction, the land trust has a plan to secure these funds and has a policy committing the funds to this purpose.” At present, we are not in full compliance with this standard.

We have also studied various attempts to calculate the future cost of easement monitoring and enforcement. While we do not presently have the means to test the assumptions made in these studies, we believe that the methodology used by Brenda Lind in a study for the Forest Society gives results which would likely apply to us if we moved to professional monitoring of all easements by paid staff. Her study concludes that this would cost \$500 per easement per year and thus require an endowment of about \$10,000 per easement; we presently have 59 easements and thus, on this basis, might require a dedicated endowment of \$590,000 for this purpose. We recognize, however, that the Forest Society’s portfolio of easements has an average parcel size much larger than ours and that its easements are generally on land at greater distances from its headquarters; both factors would tend to inflate its costs compared to ours.⁶

At present, we have earmarked endowment for monitoring and enforcement of easements of \$300,000.⁷ During discussions of potential easement donations, we presently ask most donors for a contribution of \$1,000 for the Monitoring and Easement Fund; this continues to be a fraught subject with some donors.

RECOMMENDATIONS

- 1 We should continue using Antioch NE students or other qualified volunteers to monitor easements as long as possible. In addition to the economic implications, it is part of our educational mission.
- 2 Commencing immediately, we should maintain time and expense records which would allow us to calculate the actual costs of monitoring.
- 3 The Board should reaffirm, in a formal way, its understanding that enforcement of easements is a general obligation of the Harris Center⁸.
- 4 We should set a more realistic target (say \$250,000) for our Monitoring and Enforcement Fund and use the following techniques to achieve that goal⁹:

⁶ If another organization presently had an enforcement fund in excess of its requirements, this might be a basis for a strategic alliance. We are not, however, aware of such an organization. Most of those mentioned in note 2 are actively seeking such funds and additionally seeking ways to make greater use of volunteers.

⁷ Funded by a Board Resolution adopted in November 2006.

⁸ Implemented by Board Resolution in November 2006.

- a. Set aside a proportion (say 10%) of any general endowment funds raised in the future for this purpose [superseded by Board Resolution Nov 06];
 - b. Reinvest annual earnings in the existing Fund (as opposed to transferring into general operating expenses) until we reach the target [also superseded];
 - c. Encourage further donations specially earmarked for endowment; and
 - d. Educate easement donors better as to the costs of enforcement and, particularly where the donor expects financial benefits from granting an easement, as from tax deductions, be firmer in our request for donations.
- 5 We should create and distribute better literature explaining the costs of easement monitoring and the importance of that effort to the overall scheme of land protection.
- 6 The foregoing recommendations also imply a need for adequate staffing which may entail additional staff, as circumstances demand and resources allow. Income from the special endowment may be used, at least in part, to pay for such staff and additional resources may be provided by creating stewardship funds for particular projects.

Question 5

At present, our total “focus” area is approximately 100 square miles or about 64,000 acres. Of this area, about 3,900 acres comprises lakes, rivers and reservoirs, leaving approximately 60,100 acres of land. Of this, roughly 19,500 acres (or 32% of the total land area) is in some form of conservation. Much of the balance is either undeveloped or sparsely developed.

The committee is of the view that we will not “run out” of conservation opportunities within the next 10 to 15 years, although these opportunities will become increasingly difficult and expensive over that time.

Nor are we of the view that “running out” of such opportunities will necessarily have a significantly adverse impact on the overall mission of the Harris Center, although it would entail shifting from a model based on acquisition to a model based on management of the existing resources.

- Unlike some other land trusts, the Harris Center is not heavily invested in staff and other resources devoted to the acquisition process. In fact, only one staff member – Meade – is engaged in this work on a regular basis and his participation is probably about one-third of the time he spends at the Harris Center;
- Further unlike some other land trusts, the acquisition of interests in land is not an end, in itself, for the Harris Center but a means to a larger end, that is, use of the land for educational purposes. Even if we “run out” of further acquisition opportunities, this will not materially change.

⁹ In November 2006, the Board allocated \$300,000 from our general endowment, principal and interest from which is available for these purposes. It also provided a mechanism to maintain this amount over time. For details, the reader should refer to the Resolution.

“Running out” of land to acquire may, however, affect the ability of the Harris Center to raise money, both for land acquisition and for general purposes. In order to prepare for that, the committee makes two recommendations:

RECOMMENDATIONS

1. Within ten to fifteen years, the Monitoring and Enforcement Fund ought to have sufficient earmarked assets so that earnings from those resources will cover the costs associated with maintenance of easement and executory interests; and
2. Within the same time frame, other programs (if any) which depend on funds raised through the land program should have been weaned from any dependency on these funds. How this money flows ought to be the subject of serious study.

Question 6

At present, the Harris Center owns the fee interest in approximately 2,848 acres (4,450 if we include Robb Reservoir). Much of this land is owned free and clear without deed or other restrictions on the use of the land. The committee is concerned that, in the event of bankruptcy or a financial failure of the Harris Center, a major portion of such land could become available to creditors of the Harris Center for non-conservation purposes. Putting such land under easement with a third party could insure against such events.

We are also aware that the value of entirely unencumbered land may, in the future, be useful or necessary for the larger mission of the Harris Center.

RECOMMENDATIONS

1. We should study our holdings of fee land to determine which parcels, if any, are completely unencumbered.
2. We should research easements and other legal devices to determine whether we could obtain additional protection at sensible costs.

Question 7

During Board discussions, members noted that we could potentially use our land in additional ways which further our mission. In particular, concern was expressed about invasive species and it was noted that our present monitoring practices do not include investigations relating to the presence of such species. Such investigations would entail significant changes in the methods of monitoring and would implicate additional time and other costs.

RECOMMENDATION

1. The Land Committee should consider whether changes in the monitoring program to check for invasive species would be viable and advantageous.

Broaden Communications and Outreach

Members:

1. Liz LaRose, Committee Chair – Trustee
2. Eric Aldrich – Member & Volunteer
3. Bill Berkeley – Trustee
4. Laurie Bryan – HC Associate Director
5. Cindy Cadot – HC Office Manager
6. Rosemary Conroy – Trustee
7. Gina Goff – Member
8. Susie Spikol – HC Education Co-Director
9. Francie Von Mertens – Trustee

Meetings

The committee has met three times between April 26 and the date of this report.

Committee Charter

Below are the main issues and concerns relating to marketing/communications that were voiced during Strategic Planning. This report provides commentary and recommendations on each:

1. With the general public:
 - a. The HC is isolated and people don't know/hear enough about us
2. With our membership:
 - a. People don't know enough about what we do - few are familiar with all three focus areas
3. Need to make sure that the HC is welcoming
 - a. The physical building
 - b. As an organization & on a personal level
4. Perception of elitism - There may be a perception of an "insider" group at the HC

1 & 2 - Sustainable Communications and PR Effort

The committee believes that the first two concerns can best be answered through a sustainable communications and public relations effort that includes appropriate staff, budget & processes necessary to achieve the HC's membership and outreach goals.

Recommendation: Our major long-term recommendation is to add a communications staff person.

Responsibilities

A dedicated staff person for communications:

- Has a broad picture of the organization as a whole
- Stays current with each department in the organization in order to promote it properly
- Produces promotional materials:
 - Brochures
 - Newsletter
 - Web site
 - Maps
- Manages press releases
- Conducts Outreach – publicizing the HC, presentations to the public etc.
- Frees up staff who are not PR professionals to be more efficient with their time

Recommended Staffing Models

The committee considered several models for filling this position, including volunteers, interns, contractors, part time and full-time positions. We recommend the following:

Short-Term Recommendation – Status Quo

- Maintain status quo for current staff and volunteer responsibilities
- Merge the marketing/communications and development committees
 - 6 month trial basis
- Communication tasks assigned to joint committee include:
 - Welcoming building
 - Signage
 - Maps
- Overall tasks assigned to joint committee:
 - Set policies and goals for both communications and development
 - Advise staff on developing strategies to reach stated goals
 - Other projects as needed

Mid-Term Recommendation – Best Practices Study

- Conduct a “best practices study” to uncover staffing models for communications and development functions that are appropriate for organizations similar to the HC.
 - Can review organizations of our size and mission as well as larger organizations that represent where the HC may be in 5 years
 - Can gather data and models from orgs such as the NH Center for Non-Profits
 - Some questions to answer during the study include:
 - Stand-alone communications staff or combo with development?
 - Staff titles, responsibilities, and salary?
- Study can be conducted by sub-set of strategic planning marketing committee in conjunction with the HR committee

- Long-Term (5-year) Recommendation – Dedicated Position

The best practices study mentioned above will help better define this recommendation and determine at what point the HC might be able to justify a dedicated full or part-time position. At the time of this report, the position could potentially be defined as:

- Part-time “communications coordinator”
- OR -
- Full-time “communications and development coordinator”
- Staff person with broad skill set – writing, design, press, outreach skills, database management
- Development and communications committee to continue to set goals for the year and assist in developing strategies to reach goals. Staff person to implement.
- Interns and volunteers will continue to be used on an as-needed basis for special projects.
- Outside contractors may be used on an as-needed basis when projects require skills not available within the organization. Grant monies will be sought out in these instances.

3 – Ensure that the HC is Welcoming

We agreed that being a welcoming organization includes the physical building, people and grounds. The benefits of creating a welcoming atmosphere through signs, maps, trails, and reception area include:

- Helping strangers feel welcomed and know “what to do” when they enter the building/grounds
- Acting as a strong outreach tool
- Helping to dispel the perception of elitism (concern #4)

Below are the committee’s recommendations to help create a more welcoming atmosphere:

Interpretive Signs & Maps

- Recommend taking an audit of our maps/signs and developing a plan for upgrading over time with a focus on being user-friendly and easy to read:
 - User-Friendly Maps:
 - Map of protected lands in the lobby (GIS, Mark the HC on the maps, sell?)
 - Large trail map in or outside
 - Signs:
 - Directional signs to the building
 - Main signs in the lobby
 - Green building signs and materials

Physical building & greeting people

- Reception area greeting
 - Recommend a volunteer receptionist for highest traffic times
 - People who come in are typically:
 - Curious and want to know more about us
 - Unsure if anyone is in the building when they walk in
 - This is similar to the feelings people had in the old building
 - We don't want this to be the first impression people have of the HC
 - Over the years, we have had various models of staff and volunteer receptionists
 - Volunteer effort must be done in a way that does not disrupt staff
- Reception area visual
 - Recommend creating a comfortable space with plants and a sitting area
 - See suggested signs below
 - Should not be cluttered
 - Needs to have design consistency

Trails

- Recommend more obvious trail heads at the HC with maps/kiosks/brochures at each
 - TNC has good examples
 - May be a volunteer project
 - Could expand to all HC trail heads
 - Might be a joint project with the Land Committee
 - Could get grant funding and manage with staff and intern

4 - Perception of Elitism

Items/Policies/Actions That May Support the Perception of Elitism

- The environmental movement overall is perceived as elitist
 - Land protection is perceived as benefiting the wealthy
 - People who donate land are typically perceived as being wealthy
- Hancock has an aura of being elitist
- The HC staff, board and members are typically “tree huggers” by nature
- We offer very few simple introductions to the outdoors – like strolls
- Many of the same people attend our events – this can form accidental “cliques”
- Policy of no hunting except by permit

Items/Policies/Actions That Are Not Elitist

- We serve the public schools
- The vast majority of our weekend and evening programs are free
- We offer scholarships for summer programs
- We partner with other organizations in education, land protection and programs
- Our hunting permits are free
- We own or manage about 5,500 acres of undeveloped land, all of which is open to the public access without fees for hiking, cross-country skiing, wildlife observation, canoeing, kayaking, etc.
- We own or manage about 5,500 acres of undeveloped land, all of which is open to the public for hunting by permit for all but recovering species
- We pay taxes on all of our undeveloped land at normal tax rates (including current use, where applicable)

Recommendations to Help Remove This Perception

- Say our full name “The Harris Center for Conservation Education” all the time to help the public understand our mission
- Create a volunteer “ambassador” group who welcomes newcomers to our events and introduces them to other members
- Assign board members ambassador responsibilities as well
- Add out-of-the-box programs to attract a more diverse group of people here
 - Add introductory programs for walks and talks
 - Offer more and different outreach – consider music
 - Increase education on topics such as ground water protection
- Become more user-friendly through signage, receptionist, etc. as noted under section #3 above

Succession Planning for Staff and Board

Committee members: Hunt Dowse, Paula Flemming, Roger Sweet, Mary Day Mordecai,
Laurie Bryan, Meade Cadot

Goals of Committee

- To develop plans for succession of board of board and staff.

Staff:

- Determine how to transfer knowledge and relationships from key individuals to the institution.
- With regard to key leadership functions, envision possible roles or ways of organizing.
- Define skills sets and knowledge of each key role in the organization.
- Continue the process of documenting activities and processes.

Board:

- Plan for transition of leadership.
- Set philosophy and policy on term limits.

Overall Statement of Intent for Staff Succession

Leadership succession planning is one of the most critical responsibilities of nonprofit organization governance and management. A responsible organization will have board approved policies in place and review them regularly, for both executive and board leadership succession.

There are special challenges in organizations with long-term leadership provided by founders, as these organizations have little or no experience with leadership transition. If transitions are not carefully planned in these organizations, major disruption both internally and externally can result. In addition to planning for long-term succession, responsible organizations have in place clear protocol for the emergency absence of key leaders.

Short-Term Emergency Management Plans

The organization should have on hand a set of emergency plans that would go into effect if any of its key leaders is absent from one to six months. A rough draft of this plan has been written. It will be revised and approved by the board in the first half of 2007.

Long-Term Succession Plans

It is imperative that the organization be prepared for departure or retirement of those in key positions. The committee has held private conversations with both Meade Cadot and Laurie Bryan about their long-term plans and desires relative to their roles at the Harris Center.

It appears that Meade wants to cut back significantly on his time at the Harris Center within two to three years. The committee therefore recommends that a Leadership Succession Committee be appointed within the next year to begin the process of preparing for this leadership transition.

The Leadership Succession Committee would be charged with:

- Working with Meade to determine a mutually satisfactory role for him in the future
- Working with Laurie to understand her aspirations for her work at the Harris Center
- Clarifying a process and timetable for Meade's transition
- Exploring possible leadership models for the next phase of the Harris Center life
- When appropriate, designing and conducting a search process
- Hiring or promoting from within, with approval of the board, appropriate new leadership
- Ensuring that there are adequate processes in place to assist in the transfer of key relationships (donors and others) when necessary

Board Succession

Overall Statement of Intent for Board Succession

Over the past three years, the Board Development Committee has taken a more formal approach to building a strong board for the present and future health of the organization. The committee has:

- Designed an inclusive process for new member selection
- Instituted a new board member orientation
- Instituted a periodic formal board evaluation process

As part of the strategic planning process, the Board Development Committee was also asked to propose a policy on term limits and to design a process for selection and orientation of officers.

These policies were developed, discussed at the board level, revised and, finally, approved by the board.

The work of this committee in the next two years will be to ensure that these policies are embraced by the board and the organization.

Care of Volunteers

Committee members:

Hunt Dowse, chair; Bill Berkeley, Cindy Cadot, Heidi Chester, Rosemary Conroy

Charge from the Strategic Planning Session : Strengthen the Volunteer Program

Accomplish this by working in the following areas:

- Expand volunteer opportunities
- Clarify coordination
- Address recognition
- Consider bringing in more retirees
- Formalize training and orientation processes
- Ensure that we are retaining our institutional memory

Recommendations to the Board

- Expand Volunteer Opportunities: Pilot Programs – four possibilities briefly outlined:
 - Trail Stewards, each responsible for maintenance of a particular trail or portion of a trail
 - History Project, continue where the 1982 Thelma Babbitt history left off.
 - Office help, expand opportunities where appropriate.
 - Yard Work: Chopping, Clipping and Trimming, always needed.
- Clarify Volunteer Coordination: volunteer coordination going well in some areas (trail oversight) and needs additional help in new project areas (see above). This could continue to a staff responsibility as well as an opportunity for volunteers with that interest.
- Recognition of volunteers: work with Development and Marketing Committees to implement an annual Volunteer Day to insure there is an annual basis for recognizing the work of our volunteers. The volunteer coordinators would be major players in this effort. This would be in addition to efforts at the Annual Meeting. Several ideas were put forth, all of which included food, recognition gifts, the Babbitt Room and some short thank you speeches.
- Bring in more retirees to volunteer: institute a Help Wanted section in our mailings. Find methods for asking about availability, skill sets and interests in the Help wanted sections. Additionally, it is also critical to develop an email list of members so we can target communicate with our volunteers more easily.
- Formalize volunteer training & orientation: proceed with a booklet for all volunteers, establish an orientation process, coordinate with HC Office staff.
- Institutional memory: history project to update the HC history booklet, continue current efforts for retention of photographs, written materials, newspaper clippings.