

Strategic Planning for Small Organizations: Short Course

This three-part short course is designed for small land trusts interested in understanding the value of strategic planning and how to approach it effectively. Through an interactive, hands-on format, participants will explore key concepts and practical exercises that can be applied directly within their own organizations. Tailored to the unique needs of small land trusts, this course equips both board members and staff with the tools to develop a thoughtful strategic planning process. Short course participants will meet on three consecutive Thursdays (10/15, 10/22, 10/29) from 4:00 - 5:30 PM. Active participation is encouraged, as is participation by multiple staff and board members from each land trust.

Session 1: Introduction to strategic planning

Land Trust Standards & Practices guides the land trust community to set strategic goals and review these goals at least once every five years. But *why*? Rather than accepting this as an exercise to check a box, this first session will begin with an exploration of the value of land trusts can find through the strategic goal setting process. We will then introduce the importance of vision, mission and values as a foundation for setting strategic goals.

Session outline:

- Welcome and overview of course
- Strategic planning “101”
- Vision, mission, and values
- Peer chat
- Example framework for vision, mission, values review
- Vision, mission, and values: a story from Wildlands
 - Guest speaker: Karen Grey, Wildlands Trust
- Peer chat
- Wrap up

Session 2: Goals, strategies, and activities

Having set the foundation for strategic planning, this session focuses on how to set strategic goals, strategies, and activities/objectives.

Session outline:

- Welcome and introductions
- Goals and strategies
- Two Massachusetts land trusts share their playbook and tips for setting goals and strategies

- Guest speaker: Adam Moore, Sheriff's Meadow Foundation
- Guest speaker: Emma Ellsworth, Mount Grace Conservation Land Trust
- Activity: Brainstorming goals
- Wrap up

Session 3: Work planning and evaluation

The presentations and activities in this session will demonstrate how to connect your strategic planning with work planning and how to track and evaluate your progress as you begin implementing your strategic plan.

Session outline:

- Welcome and introductions
- Moving from theory into practice: How to break down strategies into activities
- Lessons in work planning and evaluation
 - Guest speaker: Davnet Conway, Sudbury Valley Trustees
- Resources for evaluating your programs and progress
- “How do you measure success?” and other considerations for strategic planning
 - Guest speaker: Jenny Hansell, Berkshire Natural Resources Council
- Wrap up