

# PATTERNS OF PLACE

## A VISION FOR THE NEXT 100 YEARS

***“THE LAND IS FOREVER; THE OPPORTUNITY IS NOW”***

PHASE 2  
2010 - 2015

### **Preface**

This document is the second phase of a strategic planning initiative begun in 2005, and updated in 2009.

Conservancies are unique in their perpetual mission, which forces them to plan in time horizons far greater than those of most non-profits.

A land trust may have a 100-year vision. This one does. If it is ever to grow beyond a vision, there must be a solid strategic plan underlying the actions of the organization. For a strategic plan to last a century, it must be a living document. New conditions will arise, some of them permanent; some temporary. Many unforeseeable circumstances will cause progress to be more or less rapid than anticipated. Tactics will adjust to fit the time.

The title of this strategic plan – “Patterns of Place” – reflects the foreseeable. Over the next 100 years, how itW lives and our relationship between people and the land will continue to be critical to our community.

Our places are not defined by known boundaries. They come, rather, from a self-identified connection to people, to town and to land and resources. In 2009, the then-Washtenaw Land Trust took the extraordinary step of changing its name to reflect that the communities it serves are – and will increasingly be – defined less by government than by connection.

The name, “Legacy Land Conservancy” was foreshadowed by the conclusion to the Phase 1 Preface. “In taking steps to protect the pattern of these places, it leaves behind a legacy that serves the health, wealth and well-being of future generations.”

Much has changed in the years since that call was articulated. However, nothing has changed the basic truth of its message. We accept the legacy given to us by our ancestors; we leave a legacy for our children. We should pass on the second with as much pride as we receive the first. This is our goal.

## Progress to Date

- From 1971 to 2004, We it protected **1,924 acres over 33 years**.
- From 2005 to 2008, We it protected **1,787 acres over 3 years – nearly the same acreage in 10% of the time!**<sup>1</sup>
- In 2008, we became one of the first conservancies in the United States to be **accredited by the Land Trust Alliance Accreditation Commission** – a stamp of approval for both technical and business practices.

A detailed analysis of organizational progress over the past several years (2006 – 2008) is presented as an Appendix to this document.

While Legacy is generally successful in achieving its short term tactical goals, an adequate set of metrics does not exist to measure progress along the 25,000 acre continuum. The recent rapid, steep economic changes reinforce the fact that progress toward this goal will not be a steady slope. Thus, we need to determine appropriate metrics to chart and evaluate whether our tactics are achieving the desired results. Clearly, we cannot wait 100 years for the answer.

## Executive Summary/Outcomes

**This strategic plan represents the second phase of a long range effort to create one of Michigan’s most successful and progressive land conservancies.** In the long term, this work can only be judged as successful if it leads to the desired outcomes. The long range outcome is clear – 25,000 of the most important acres protected – forever. This plan includes a series of simple metrics for tracking progress toward that goal.

Based on this plan, two short-term (five-year) outcomes can be anticipated:

- By June 30, 2015, 40 new parcels will have been protected, totaling at least 2,000 acres. At least 75% of these parcels will be priority lands.
- Annual budgets will have increased by 150%. 50% of each annual budget will be devoted to land projects, including increased purchase of development rights.

In order to achieve these ambitious goals, new staffing will be required:

- A full-time land protection specialist
- Stewardship staff needs to be expanded to  $\frac{3}{4}$  time, with part time (summer) enhancements.

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<sup>1</sup> June 30, 2010 that number stood at 4,290.

- In order to avoid becoming ‘staff heavy,’ the Conservancy will continue to rely on volunteers to complete important work. As this volunteer compliment grows, a part-time volunteer coordinator will be necessary to manage this work and ensure a positive experience for the volunteers that also produce important work for Legacy.
- Legacy needs to move away from its traditional reliance on donated easements and understand where and why it would devote the resources necessary to pursue funding for acquisition of easements.

The following document expands on these outcomes and the rationale on which they are based.

## Context

The context in which we do our work is in rapid flux. Contextual items that seem critical today may be of little importance in a year. However, certain issues appear to be constant and fall into the category of trend, rather than fad.

### The Economy:

The economy always has various and important implications for land protection.

- **Fundraising**, whether for general operations or land projects is greatly diminished as people find both paid work and the value of their investments declining.
- **Tax deductions** for donated easements are less appealing to families whose income has been reduced through diminished portfolios or lost paid work. This limits easement donations.
- Aging farmers find themselves with few, if any, outlets to convert land into retirement funds. **Purchase of development rights** and even **fee simple purchase** of some lands is therefore more attractive to them.
- Conversely, **declining land values discourage landowners** from either selling or donating easements, as the value of the sale or the deduction declines accordingly.

### The Culture at Large:

Since the initiation of this plan in 2005, the culture has embraced elements of our mission in a variety of ways.

- **“Locavore”** was the ‘word of the year’ in 2008, and 100-mile diets, slow food, community supported agriculture and farmers markets are commonplace among affluent consumers.
- The recognition of “Food Deserts” has brought the issue of **healthy, local foods** to urban and low income communities.
- An embrace of **“quality of place”** makes promotion of open space and recreational lands part of business attraction strategies for economic development.

- **“Staycations”** encourage people to take ‘day trips’ in their own back yards, often to hiking, swimming or other outdoor locations. With over 30,000 acres of public recreation lands within a 90 minute drive of over 5 million people, **new opportunities exist for Washtenaw and Jackson County communities.**
- The popularity of Richard Louv’s *“Last Child in the Woods”* has created new interest on the part of parents and educators in the **benefits of linking children with nature.**

### The Non-Profit Context:

The non-profit context remains dynamic, with a number of new elements influencing how we all do business, and most of the previous dynamic remaining.

- **New IRS requirements** are putting pressure on non-profits to tighten accounting and prevent the appearance as well as the practice of insider dealing and conflict of interest.
- Federal proposals recommend **reducing the size of the charitable gift deduction** for families with incomes over \$250,000. The implications of this on non-profit fundraising are unclear, as is the ultimate fate of this proposal.
- The economy is the big driver for the non-profit environment. With over 1,000 non-profits in Washtenaw County, it is likely that **many will not weather this downturn in the economy.**
- The non-profit environment is more challenging. **Competition for donor dollars is increasing; donors are aging.** Well-articulated strategies are more important to foundation givers, and all donors are seeking an entrepreneurial environment, that respects the values of the mission and meets charitable guidelines.

### **Land Use Context**

In 2005, the land use context was mixed. Much of the land (75%) in the area remained undeveloped, but with severe, near term threats to the ability to sustain a farming community, and retain the sense of urban separation so much a part of our community fabric. **Projections of nearly 56,000 new housing units in 25 years suggested a generational opportunity to make a permanent impact on the landscape.**

Today, that context looks much different:

- **By 2035, Washtenaw County will add approximately 21,350 housing units.** This is a reduction of nearly 50% over the 2030 projections of just five years ago. Jackson County is likely to grow even more slowly. This slows the conversion of farmland to subdivision, and **provides an opportunity for land protection groups to strategically acquire land and rights in land** that might have been competitively unavailable previously.

## The Conservation Environment at Large:

Conservation does not exist in a vacuum. Many of the above mentioned trends have created a boom market for the concept of conservation. Other trends also bode well for the idea of permanent land protection:

- A growing recognition that quality of place, including access to open spaces, is a **critical component in attracting the jobs and talent of the future.**
- An interest in the role of **'green infrastructure'** as an alternative to 'hard engineered' infrastructure. This includes the role of permanently protected lands in carbon sequestration as a limit to climate change.
- **The Internal Revenue Service continues to impose new** requirements on easements that do not appear to have been envisioned by the drafters of the legislation.
- Local government **assessors continue to ignore State Treasurer's directives** to consider the diminished value of easements in setting property evaluations.
- Some policy think-tanks and legislators in Michigan continue to **advocate for, at the very least, a moratorium** of new public lands, with divestiture still occasionally raised. However, the **growing recognition of Heart of the Lakes**, along with the MSU Land Policy Institute has helped counter these efforts.

### **Conservancy Context:**

A subtext of the conservation environment is the conservancy environment. Conservancies continue to be pushed to professionalize and become more efficient and entrepreneurial.

- Conservancies are being pushed to **become more professional** at a time when resources are constrained. **Accreditation has placed a greater emphasis on conforming to standards and practices**, and this is expected to continue.
- Over time, these are likely to be less voluntary good practice, and more mandate for sustainability. **Meeting these standards will place new burdens on land trusts, and it should leverage our success in achieving this standard.** To date, no other Southeast Michigan conservancy has applied for accreditation.
- This push toward professionalism and accreditation may result in some land trusts seeking **homes in more established conservancies.**
- In spite of this, the **number of conservancies in the US and Michigan continues to grow.** Most of these are volunteer organizations; some are affiliated with other larger, more highly staffed organizations.
- A complex environment of taxpayer funded conservation agencies and privately supported non-profit organizations can be confusing to the donor community. These organizations have complimentary missions and values, and they **must learn to work closely together.** They must clearly **articulate a niche** in this crowded environment, leveraging our history, our accreditation and our successes.
- Conservancies are recognizing the limitations of their perception as a movement made up of white, middle class landowners. **Land protection for 'the entire community' is an increasing focus.**

- The **generational land transfer envisioned in 2005 is continuing**, and accelerating. Reduced property values and the uncertainty of post-2010 inheritance taxes are causing landowners to postpone decisions, sometimes until it is too late, triggering family disputes.
- Having been advised that they are not qualified to determine the presence or absence of conservation values, the IRS has focused on appraisals and the **ability of conservancies to guarantee perpetual protection of the conservation values defined as being present.**
- As conservancies are reaching maturity, so too, are their easements, with potential challenges by successor landowners. Legal defense will become increasingly important, as land trusts consider **not ‘if’ but ‘when’ a challenge will be mounted.**

## Values

The Conservancy adopted a series of values during its 2005 strategic planning process. This was the first such statement articulated by the organization. As a result of the 2008 Strategic Planning retreat, additional values have been articulated, and these are incorporated in the amended values statements presented below.

- **Our work is important to the *entire* community**, now and in the future, and so we all benefit from it
- **Our work must endure.** Unlike many organizations, we lack the luxury of folding our tents should economic challenges become severe.
- **Our work has to be flexible.** Changing circumstances may require that we shift the nature of our work from time-to-time. This flexibility should be viewed as a tactical change, rather than a change in mission or strategy.
- **Partnerships are core to our work.** When evaluating competing efforts, those that provide an opportunity to expand and strengthen new or existing partnerships will take priority over other, independent efforts.
- **Our community extends beyond the boundaries of our service area**, and beyond the individuals who support our work, or currently benefit directly from it. It is economically, ethnically and racially diverse. It may not even be conscious of the benefit it receives. It must keep this community in mind in our work, and consciously attempt to be inclusive of this broader community, in a spirit of real partnership and mutual learning.
- We strive for **continuous improvement and rigorous evaluation** in all our work.
- We value a landscape that retains the ‘personality’ of individual communities, and where **physical separation between communities** is protected. At the

same time, we believe these communities and the green lands surrounding them should be connected, culturally and physically. We value efforts to **link contiguous open space and green corridors** however created or owned, in order to encourage long-term preservation of wildlife corridors and natural and human communities.

## **Mission<sup>1</sup>**

Legacy Land Conservancy protects forests, prairies, farms, wetlands and waters – today and forever.

## **Vision**

Legacy has articulated two visions of the future. The first, and most important, is a vision of the legacy we wish to give our children and our grandchildren: the pattern of place it will maintain for future generations.

### **Vision for the community:**

“As the 21st century comes to an end, visitors to the community will be struck by the connected, contiguous open spaces characterizing the community. Most specifically, an arc of open land will run from the Pinckney Recreation Area in the north through the Sharonville Game Area in the South, through the Waterloo area. This arc will continue in ‘arms’ at either end, encompassing the Huron and Raisin and Saline River systems. Nestled within the arc will be an economically healthy farming community.”

The second vision is for Legacy itself, and the role that it plays in achieving that community vision.

### **Vision for the Legacy Land Conservancy**

“The Legacy Land Conservancy will be a principal mover in a regional land conservation system that integrates lands that are publicly and privately owned; either natural areas or agriculturally productive, and support a functional landscape. This region will include what is now viewed as ‘southeast’ and ‘south central’ Michigan, and will recognize the interconnectedness of these areas.”

These twin visions, originally articulated in 2005, remain powerful guides for Legacy in 2009 and beyond.

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<sup>1</sup> Revised Mission Statement recommended by Executive Committee. Previous mission statement: “Legacy Land Conservancy protects farms and natural areas in and around Washtenaw County.”

## Strategic Land Priorities

In 2005, the Conservancy adopted a set of land priorities that guided our efforts in land protection, and gave new rigor to our acceptance criteria. In the intervening years, these criteria have been refined and driven to the parcel level, allowing us to proactively approach owners of attractive properties. In the process, our knowledge of ecological function, soils and other key elements has grown, allowing us to further improve our acceptance criteria.

### ***Public Lands (Ensuring public accessibility)***

With more than 35,000 acres, The Waterloo/Pinckney/Sharonville/Hayes State Arc is 'up north' for an increasing number of southeast Michigan residents who wish to enjoy hunting, hiking and other recreational activities. Given Michigan's shifting economy, the area's proximity to over 50% of the state's population provides an opportunity to expose cash-strapped residents to the out-of-doors, while creating economic opportunity for our communities.

While its size makes this a complex area, the number of partners and the diversity of the tools that can be used to achieve this contiguous arc of protected properties provide opportunities to integrate public/private protection efforts. Natural area and farmland protection can be pursued in partnership with a variety of other interested groups.

**Legacy's strategy in this area is to work with other stakeholders to identify key properties for inclusion in state holdings, county parks, and permanently protected buffer and linkage areas.**

- Legacy will enter into **formal and informal relationships** with groups such as Washtenaw and Jackson County Parks, MDNRE, The Nature Conservancy and others to identify key parcels of property for permanent protection, through either fee simple acquisition or easements.
- Legacy will **identify key landowners and key natural areas** in the arc, as well as **key farmland properties** that would meet established criteria for purchase of development rights in the farmland strategy, and develop outreach strategies for both natural area and farmland stakeholders.
- Legacy will **actively seek to acquire easements** on identified parcels, either as a means of facilitating their fee simple acquisition, or for permanent protection.
- **Development rights will be purchased** where appropriate.
- Legacy will **serve as interim owner** of threatened parcels central to completion of the vision, but which will be acquired in fee simple by another entity at a pre-determined date.



- Legacy will work with landowners to **identify other, non-permanent means** of land protection as an interim step toward permanent protection.
- Legacy will **encourage donated easements, either as an end in itself, or as a staged approach to fee simple conservation.**

Acceptance criteria for these natural areas are:

- Buffer properties – parcels 20 acres or more adjacent to the Waterloo or Pinckney Recreation Areas, where development of these parcels could change the character or use of adjacent public lands.
- In-holdings – parcels 20 acres or greater within the MDNRE project boundaries, where MDNRE either seeks to own the land, or would do so with a willing seller and/or available funds.

## ***Farmland***

As more than one farmer has made clear, protecting farmland, assuming it is to be economically viable as productive agricultural land, means protecting the farm economy.

In recent years, agriculture has been the only part of Michigan's economy to consistently experience growth, averaging nearly 6% growth each year. The opportunity exists to increase the economic impact of agriculture in southeast Michigan, including local foods and import substitution of Michigan products to local agribusiness. None of this can take place without a substantial effort to keep farmland in productive use.

**Legacy's farmland protection strategy recognizes the business aspects of farming. Its essential strategy is to keep contiguous blocks of farmland intact to support viable farms and farm families. A second element of this strategy is to work with area farmers and groups interested in agricultural economic development to identify and create new opportunities for a sustainable agricultural economy.**

**Priority lands will include high quality farmlands and parcels in support of those high quality lands, located in potential blocks of 640 acres (one section) or more. Priority is also given to contiguity with other protected lands, and to farm community leaders and influencers. Minimum size for farmland protection will be 40 acres of actual productive farmland containing soils that are identified by the NRCS as prime or unique.**

- Legacy will seek permanent protection of key farmland parcels through **purchased development rights**. Where Legacy takes the lead on such projects, PDR projects shall be located within Legacy's priority area. **Legacy's priority area for acquisition of development rights, particularly for those which incorporate purchase of development rights requiring local fundraising, shall be the**

**townships of Lima, Lodi, Scio and Freedom in Washtenaw County.**<sup>1</sup> Within this area, it will actively seek opportunities to protect agricultural lands, temporarily and permanently. Outside of these lines, Legacy will accept donated easements of appropriate lands, on an opportunistic basis.

- Legacy will seek to be the **‘one stop shop’ for farmers seeking permanent land protection**, including serving as a broker for township and county PDR programs where appropriate. In these instances, Legacy will follow the acceptance criteria identified by the contracting program, provided such criteria would meet the minimum acceptance criteria for Legacy within its priority area.
- Legacy will seek permanent protection of key farmland parcels through **donated easements**. As multi-generational farm families prepare for another generational shift, this strategy may be attractive for **estate planning or land transfer purposes**, by reducing prices or tax liability as appropriate.
- Legacy will encourage long-term protection of farmland parcels using short-term easements. (I.E. NRCS Programs or PA 116). While these are not permanent land protection measures, they may provide a **‘breathing period’** for farmland owners, allowing other economic measures to come into play.
- Legacy will **explore alternative methods of funding purchase of development rights** for farmland, including consideration of appropriate millage initiatives.
- Legacy will encourage donated easements on properties not in agricultural production, such as woodlands, wetlands, or other **non-agricultural lands in support of farming operations**.
- Legacy will participate in ongoing **agricultural economic development efforts**, helping to develop local markets for local farm output, whether through new value-added production, specialized agriculture and ag-tourism, or local market development.
- Legacy will **work with local partners to encourage young farmers** to enter the industry in a profitable and sustainable manner.
- **Legacy will serve as an advocate for change** in state land use and taxation laws designed to encourage land owners to retain their land in agricultural use, and reduce the pressure for development.

Acceptance criteria are:<sup>2</sup>

- Properties located in four primary townships in Southwest Washtenaw County (Lodi and Freedom, Scio and Lima south of I-94).

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<sup>1</sup> A triangle of land within those townships has been further refined and identified as critical for PDR. These lands lie within one mile of already protected lands, and can be easily connected.

<sup>2</sup> These acceptance criteria are subject to revision as Jackson County priorities emerge.

- 40 acres or more of prime agricultural soils.
- PDR for which it would fundraise in a ‘triangle’ encompassing parts of all four townships within one mile of other protected properties, and where blocks of 640 acres or more could theoretically be assembled.

## ***Rivers and Natural Areas***

Over the past several years, the Conservancy’s understanding of water resources has grown significantly. Specifically, there is a better understanding of the role first order streams and headwaters play in the quality of main river stems. From a water quality perspective, the protection of the wetlands, illusive streams and small creeks that make up these first order streams<sup>1</sup> and headwaters areas ensure the water entering the main stems is cleaner. Washtenaw and Jackson counties have significant resources in these first order steams and headwaters areas, whose protection will provide benefits to residents throughout the state.

Legacy will strive to protect these first order streams and headwaters areas.<sup>2</sup>

- Legacy will identify these important areas, using Huron River Watershed Council **bio-reserve analysis and similar existing tools.**
- Working with Conservation Districts and others, Legacy will identify a variety of **tools for long-term and permanent land protection**, educate landowners and encourage their implementation.
- Legacy will **encourage permanent buffer easements** along the banks of these first order streams, even when such easements are limited in size and scope.

While concentrating efforts on these riparian areas, Legacy will continue to explore **scenic easements** along the main stems of the rivers. These scenic easements will help maintain a community-wide connection to important river resources.

Acceptance criteria are:<sup>3</sup>

- Natural areas of 20 acres or more located on first and second order streams, or where first or second order streams would exist had land not been drained for development purposes, and having a HRWC Bio Reserve Score of 600 or greater.

These acceptance criteria are subject to change as additional priorities on the River Raisin, Grand and Kalamazoo emerge.

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<sup>1</sup> First order streams are the smallest streams where headwaters coalesce into recognizable creeks and streams, which feed into larger tributaries which, in turn, feed the main streams.

<sup>2</sup> Additional work remains to be done on Riparian tactics, with the support of the Huron River Watershed Council, Upper Grand Implementation Project and others.

<sup>3</sup> These acceptance criteria are subject to change as additional priorities begin to emerge on the River Raisin, Grand River and Kalamazoo River.

## **Other:**

Not every parcel Legacy seeks to protect will fall neatly into the priority areas identified. Assuming properties meet the general criteria of IRC 170(h), each parcel should be individually considered on its merits. Several classes of 'non priority' properties merit particular discussion, however:

- **In 2008, Legacy made a committed decision to work throughout Jackson County.** The quality of farmland, particularly in the western part of the county, and the unique and high quality natural lands throughout both the southern and northern areas in the county dictate serious and experienced consideration of land protection options. Legacy will utilize work completed by The Nature Conservancy, Jackson County Purchase of Development Rights program, Michigan Department of Natural Resources and others to inform its decision to protect land throughout this County. **Legacy assumes that before the end of this planning period, discrete priorities will begin to emerge, similar to those adopted for Washtenaw County. Until such time as these priorities are better defined, Legacy will not seek to hold land in Jackson County in fee simple.**
- Legacy and other conservation organizations hold many thousands of acres of land under easement and in fee simple. The integrity of these parcels, and their benefit to the at large, is enhanced and maintained by the further protection on contiguous properties. **Legacy will accept easements on lands contiguous to already protected lands, based solely on the criteria identified in 170 (h), and whether it is the most appropriate organization to hold such an easement.** Unless the property fits into one of Legacy's priority areas, the Conservancy will NOT entertain purchasing an easement solely on the basis of contiguousness. Nor, unless other strategic goals are met, will the Conservancy seek to hold such properties in fee simple. In all instances, **smaller parcels may be considered** if they are part of a larger protected area, **or if their acceptance does not place an undue monitoring burden on Legacy.**
- Frequently, Legacy is approached to accept lands outside its priority geographies. These lands may contain valuable resources, and/or be important to the community in which they are located. Legacy recognizes the importance of these lands, but also realizes it must focus the majority of its efforts on its priority lands. In an effort to balance these competing interests, **non priority lands will meet the criteria of their nearest priority analogue, and may be subject to other requirements as identified by the Land Protection Committee.** (E.G. Forever Fund gift.)

In every instance, Legacy may choose to accept or reject a parcel that otherwise meets the criteria of IRC 170(h), based solely on their discretion.

## Strategies and Tactics for Connecting People with Land

Out of our 2009 strategic planning session, a need for education emerged as a key theme. This has been identified as ‘connecting people with land’, but has a variety of potential components and benefits. **Landowners** require education to connect their land with the opportunity to protect it – forever. The landowners of the area, whether or not their lands are protected, are **guardians of a legacy**, handed down to them from the families who first settled our communities. **The public**, connected with land, is more likely to support land protection efforts, both through public policy and millage efforts, and through their private donations. If our efforts are to be sustained through perpetuity, it must connect a **new generation** to the importance of land protection.

This remains an emerging area for Legacy. In the near term, the Conservancy will limit its educational efforts as follows:

- Encouraging families, scout troops and others to participate in regularly scheduled work days and events.
- Encouraging affinity groups (equestrians, bicycle groups, etc) to become more active in land protection.
- Partnering with schools and others who might wish to use our conserved lands for educational purposes; encouraging landowners to accommodate this activity on their easement properties where appropriate.

## Organizational Strategies and Tactics

Legacy recognizes that discipline and rigor is critical to success in this difficult climate. The following strategies will guide the Conservancy’s efforts to achieve its 25,000 vision and remain a leader as it has for the past 38 years. This portion of the strategic plan has changed little since Phase 1. The disciplines of excellent non-profit management, entrepreneurial culture and measured risk taking remain appropriate high level strategies for the organization.

- **Excellent non-profit management**, including an active and appropriately engaged Board of Directors, professional staff, and adherence to standards and practices that exemplify the best in land trust management.
  - Incorporate an ethic of continuous improvement.
    - Review standards and practices on a rolling basis, ensuring state-of-the-art practices and adherence to existing policies.
    - Successfully reaccredit in 2013.

- Use this accreditation to encourage greater planned giving among long-term and/or aging donors.
- Retain a solid financial footing, with established fund balances, and a fully funded Forever Fund; take advantage of programs such as the LTA's recently confirmed legal defense insurance program.
- Better understand the donor interests of younger, post-boomer donors, board candidates and volunteers in order to continue sustainability.
  - Increase use of new technologies to convey our message to a changing population.
- Identify our strongest traits (e.g. landowner relations) and leverage those on behalf of other local programs on a fee-for-service basis.
- Continue to strategically expand our service area.
  - Solidify role in Jackson County.
  - Develop appropriate relationships with volunteer conservancies serving Jackson, Ingham and Lenawee Counties, and explore possible partnerships.
- **An entrepreneurial culture** that is willing to take measured risks to ensure the sustainability of the organization, while keeping foremost the mission of the organization.
  - Work to facilitate open market conservation sales.
  - Explore creative conservation finance opportunities.
  - Working with Heart of the Lakes and others, further quantify the economic benefits of agriculture and conservation to communities.
  - Partner with others to encourage eco-tourism, ag-tourism and other new agricultural business opportunities.
  - Seek out new fee-for-service and other appropriate revenue producing opportunities.
- A **'firmly flexible' strategic plan**, designed to guide the organization through an ever-changing environment. Revisit this plan regularly to assure the validity of its goals and the appropriateness of its tactics, even as the **vision for the future remains a constant**.
  - Establish enterprise funds and rebuild fund reserves to ensure the ability to move rapidly to protect strategically important properties, and weather difficult economic times.
  - Consider actively advocating a preliminary emphasis on conservation education and stewardship education, as a preliminary to permanent protection.
  - Evaluate the appropriateness of greater efforts in Lansing on behalf of land conservation, through Heart of the Lakes and directly with our legislators; focus on policy as well as funding issues.

## Metrics

Ultimate success of Legacy's efforts will not be known for a generation or longer. If, in a generation, the community continues to be known for its clean water, productive farms and robust natural areas, the organization can be said to have achieved its vision. This, and the 25,000 additional acres represented by this success, are long term measures of success, and do not provide an adequate tracking of progress over time. Interim measures must be developed if the Legacy is to move beyond activity based evaluation and if it is to establish benchmarks by which to evaluate its progress toward the goal of 25,000 of the most important acres.

Legacy has taken a '**balanced portfolio approach**' to this evaluation. The Board of Trustees believes this will provide us with specific goals and progress for their use, as well as for our donors and prospective funders. It has the additional benefit of being easily adaptable, as newly identified priority lands emerge. (E.G. as priorities on the River Raisin and Grand River are established, the weighting for 'river and natural areas' priorities will change accordingly, all within the 25,000 acre overall goal.)

This approach ensures that it continues to focus on the key outcome – protection of important lands, while recognizing three critical elements:

- Land protection is a private decision on the part of a landowner, and the timing is not completely within the control of Legacy.
- Various external forces – grant availability, public consciousness, and other educational efforts – may shift emphasis from one priority to another from time-to-time.
- Failure to keep the larger perspective in mind may result in protecting the low hanging fruit in contrast to protecting the broad range of resources important to the area.

Based on an analysis of our current portfolio, at June 30, 2010 **our current portfolio is over-represented in river properties and public lands, and under-represented in agricultural lands.** This is likely to remain the case over the next five years, as current public policy identifies a variety of funding sources for watershed protection, while our state partners have resources available to assist in protecting the major public lands in southern Michigan. Lack of funding for protection of working farmland communities remains a critical issue throughout Michigan. Finally, the sheer size of this priority at the present time skews its relative weight in the priority system. As additional work is completed in the riparian/natural area priorities, this imbalance should be corrected.

	public	farm	riparian/natural areas	
POTENTIAL	16655	87354	24186	128195
GOAL	13%	68%	19%	100%
GOAL	3248	17035	4717	25000
CURRENT	579.61	1337.14	1210.01	3126.76
CURRENT	19%	43%	39%	
TO GOAL	2668	15698	3507	21873

These metrics will be tracked and reassessed annually and the results of that process will be presented to the Board of Trustees, with recommendations for such adjustments as may be considered necessary to maintain appropriate balance in the portfolio between various priorities in light of changed circumstances.

## Outstanding Issues

Strategic planning is an evolutionary process, and the completion of this plan leaves several issues unaddressed. These should be whittled away at over the next five years, and reflect significant strategic issues:

- By virtue of a previously strong economy and organizational frugality, Legacy Land Conservancy has established a healthy fund balance that is carrying it through the current economy. As the budget grows, the size of the fund balance should grow accordingly. The current policy of retaining a fund balance equal to six months operations should be reevaluated to determine whether it is adequate, and fund raising expectations adjusted accordingly.
- Land priorities must be established in Jackson County for riparian/natural areas and farmland.
- Legacy must better refine its process for determining where it will extend resources to purchase development rights, regardless of the priority area.
- Legacy must determine the role of preserves in its operations. The six preserves it currently holds have been acquired through donation and largely by accident. The organization should undertake a serious discussion about the role these properties play in our organization now, what role they might play in the future, and what, if any, additional preserves it choose to pursue and/or accept.
- Legacy *must* implement a planned giving program to continue the efforts to long-standing donors and capture the potential transfer of wealth which still remains likely over the next decade. It lags behind many of its peers in this regard, and should make it a priority.