



# Planting the Future

Strategic Plan 2023-2026



with facilitation by



## INTRODUCTION

Willowsford Conservancy (the “Conservancy”) stewards over 2,300 acres of greenspace and farmland for the educational, social, and recreational benefit of the Willowsford community, and the environmental benefit of the greater community in Loudoun County. The Board of Trustees is charged with conserving and sustaining, with the help of community residents, the future environmental and agricultural resources under the Conservancy's protection.

This is the inaugural strategic plan for the Conservancy, independent of prior developer-created plans. This planning process for 2023-2026 was guided by the Conservancy's Strategic Planning Committee, which was composed of board members and the Interim Executive Director. This plan is grounded in reality of the environment in which the Conservancy operates and is informed by the perspectives of the Conservancy's key stakeholders and summarized in the Phase 2 Report (see Appendix).

Key stakeholders consulted include:

- Residents through feedback provided through the Conservancy's survey (see Appendix);
- Three focus groups of residents representing different neighborhoods, community clubs, volunteers, CSA participants, and tenure in the community;
- The HOA board (group discussion);
- Senior staff (individual interviews); and
- Board members (individual interviews).

Following presentation of the current situation analysis, the Strategic Planning Committee addressed organizational identity by reviewing mission, vision, and values, as well as a number of big questions facing the Conservancy. The committee's feedback on these issues served as the basis for a board retreat agenda (see Appendix) at which the board established new statements of mission, vision, and values, answered the big questions, and established the Conservancy's strategic direction through goals and strategies identified in this plan. Following board approval, an implementation plan will identify the activities, responsibility, timeframe, and key performance indicators for each strategy.

The plan underscores the Conservancy's commitment to protecting, maintaining, and promoting the unique character of Willowsford as governed by the Community Covenant and By-Laws under which the Conservancy operates.

## **WILLOWSFORD CONSERVANCY IDENTITY**

### **MISSION**

To protect our land and promote conservation and sustainable farming so that our community discovers a deeper connection to nature and each other.

### **VISION**

Willowsford is a world class agrihood that inspires community-based conservation and farming.

### **VALUES**

#### Engagement

Willowsford Conservancy engages residents and the broader community about the importance of conservation and farming and values the engagement and support of the community with our efforts.

#### Health & Well-being

Willowsford Conservancy promotes the health and well-being of its residents, its staff, its ecosystem, and the world impacted by those groups. Lives should be improved by living in Willowsford.

#### Stewardship

Willowsford Conservancy embraces our responsibility to preserve and enhance the land and community resources with which we have been entrusted, for today and future generations.

## **FUTURE STRATEGIC PROFILE**

### **3-YEAR VISION**

Willowsford Conservancy has developed new and increased revenue streams that have improved the ability to retain and recruit the staff needed to develop and implement long-term land management and farming plans. The Conservancy has become operationally efficient and effective and marketing efforts have led to increased community support and engagement. The Conservancy is recognized as a leading agrihood that is sought out for its expertise by other current and planned agrihoods, freely sharing best practices and exchanging ideas. The Board of Trustees has transitioned from a managing to governing board that has grown in size and diversity through strategic board recruitment and succession planning. In fulfilling its mission, the board works collaboratively and in alignment with the Willowsford HOA.

### **SCOPE OF OPERATIONS**

Stewardship of the land for conservation and preservation, farming, recreation, and education is core to the ethos of Willowsford Conservancy. Farming and recreational use of the land, through the trail system, camping, fishing, and other activities, are amenities for the resident community and financially supported by the resident community and further subsidized through other revenue generating activities of the Conservancy. The farm

provides produce and products, for residents and engagement opportunities through volunteering and program activities.

The Conservancy's work meets the needs of the community's residents and is supported by new grantors and sponsors as key stakeholders. Its programs and services include:

- An enhanced farm-camp experience with improved facilities
- An annual calendar of conservancy program activities and events, inclusive of signature events, along with participation in HOA activities and events,
- Improved farm facilities that support increased retail sales, a growing CSA, and offer community engagement opportunities, and
- Expanded use of the Boathouse and other Conservancy spaces to support programs and drive revenue.

## **COMPARATIVE ADVANTAGE**

Willowsford Conservancy's value proposition is based on its unique ability to provide residents with healthy ecosystems and opportunities for service, education, and community well-being. It supports the greater good of Loudoun County by preserving the natural beauty and ecosystem of Conservancy land. The Conservancy delivers its value through its high-quality staff, board governance and advocacy, volunteers, and local partnerships with community-based organizations and businesses.

## **GOALS AND STRATEGIES**

### **GOAL 1: BUILD ENGAGEMENT AND COMMUNITY STRATEGIES:**

- Create a resident stewardship program that offers ongoing orientation and education activities and events to build resident appreciation for the value of conservation and farming, in general, as well as the purpose of the Conservancy and how land stewardship and farming benefit the Willowsford community
  - Clearly communicate the benefits and limitations related to non-resident individual and group use of Conservancy amenities (see Table 1)
  - Develop talking points for board members to serve as advocates for the Conservancy
  - Provide updated educational content and information for residents and the broader community
- Develop a formal volunteer management program to attract, engage, and steward residents and members of the broader community who volunteer
  - Determine baseline resident participation and establish goals for future participation
  - Attract youth volunteers by seeking approval from local high schools for students to earn community service hours
  - Establish a volunteer recognition program to acknowledge volunteers and build awareness of volunteer opportunities

- Utilize farming operations and conservation practices to provide the community - especially youth - with a direct connection to land and agriculture (education) with opportunities to interact (volunteering) and build community
- Increase external awareness on the concept of an agrihood and what this means for life at Willowsford by educating real estate agents serving the Willowsford community

## **GOAL 2: ATTAIN OPERATIONAL EXCELLENCE IN LAND MANAGEMENT AND FARMING**

### **STRATEGIES:**

- Develop a land and farm management program that can be sustained by current financial resources and scaled as resources increase.
  - Create implementation plans with key performance indicators to measure progress in meeting goals
  - Monitor compliance with the implementation plans
- Evaluate outsourcing opportunities to improve efficiencies while maintaining the core mission.
- Establish land management and farming advisory boards with environmental, land management, and farming experts
- Develop partnerships with other local farms to share knowledge and best practices
- Develop partnerships with local conservancies and land trusts to seek shared grant funding and share volunteer labor
- Establish relationships with other agrihoods to leverage awareness and share best practices

## **GOAL 3: BUILD A HIGH PERFORMING GOVERNING BOARD OF TRUSTEES**

### **STRATEGIES:**

- Move from a managing board to a governing board:
  - Sustain the board through strategic recruitment, succession planning, expanded size, and ongoing board education
  - Adopt key performance indicators for land stewardship and farming and monitor performance against the goals
  - Activate advisory boards to educate and engage the community:
    - Youth advisory board
    - Resident advisory board
- Institute Conservancy-HOA cross-board representation (liaison)

## **GOAL 4: BUILD AND STRENGTHEN STAFF TALENT**

### **STRATEGIES:**

- Hire an Executive Director with domain expertise, and community engagement and fundraising experience
- Develop and support staff:

- Implement policies to ensure staff well-being with clear, reasonable workload and results expectations
- Ensure adequate staffing for volunteer coordination, resident customer service, and fundraising
- Institute cross-training to minimize disruptions from employee leave and turnover
- Institute management systems and processes to better support planning, workflow, and program delivery
- Create leadership succession plans that incorporate a “future ambassadors” program to maintain connections and advance agrihoods
- Establish an internship program that provides training, additional resources, and future talent

## **GOAL 5: EXPAND AND DIVERSIFY FUNDING SOURCES TO MEET CAPITAL AND OPERATING NEEDS**

The Conservancy anticipates capital and operating expense needs beyond what current Community Enhancement (transfer) Fees and Annual Assessments can support. These expenses will be managed in alignment with increases in revenue from current sources as well as new revenue sources.

### **STRATEGIES:**

- Develop multi-year capital expense and operating budgets to address funding needed during the plan period.
- Grow earned revenue streams from:
  - Rental of Conservancy amenities
  - Program fees which may include pricing differentials for residents and non-residents
  - CSA participation
  - Farm stand and online farm store sales
- Seek new sources of contributed income from:
  - Corporate and other sponsors
  - Grant-makers who support environmental and agricultural programs of 501(c)(4) nonprofit organizations
- Adopt land disposition policies to govern:
  - Easement fees
  - Sales
  - Rentals
- Establish policies for using the endowment:
  - Evaluate and set an appropriate spending policy that provides funding and ensures the perpetuity of the endowment fund
  - Establish the conditions for using the endowment spend to support operations versus capital or other projects
  - Assess the potential for establishing a 501(c)(3) to house the endowment and provide opportunities for tax-deductible charitable contributions, including planned giving

- Work with the HOA board to determine the long-term optimal mix of funding from Community Enhancement Fees and Annual Assessments.

## OPPORTUNITY SCREEN

Willowsford Conservancy will evaluate new opportunities for events, programs, partnerships, retail operations, and facility improvements in the context of its strategic goals based on the following criteria:

1. Alignment with mission: Does the opportunity fall within and advance the mission as approved?
2. Funding: Are new funds available to cover incremental costs plus overhead?
3. Capacity: Does staff have the capacity to undertake the project without sacrificing current strategic priorities?
4. Return on effort:
  - Impact - Will the impact on the target audience be worth the effort? Will the impact rely on a one-off engagement or will it be developed for multi-year benefit?
  - Reach - Will the opportunity reach a broad enough segment of the community for the effort required?
  - Leverage for the future - Will the effort expended build for the future in a way that can be leveraged?

### Table 1 - Non-resident use of Conservancy Amenities

#### Individuals:

- May volunteer at the farm, maintaining trails, or in deer management
- Volunteers have access to trails
- Volunteers have fee-based access to amenities and programs, such as camp, subject to resident priority and price differential

**Outside groups and schools:** Adjacent and mission-aligned nonprofit organizations, schools that serve residents, resident-connected corporate sponsors

- May provide volunteers at the farm
- Will have fee-based access to facilities and trails
- May participate in programs subject to resident priority and price differential