



The Watershed Center Grand Traverse Bay Strategic Plan 2018 – 2020

Table of Contents

Introduction	3
Data Gathering and Assessment.....	3
Affirmation.....	4
Programs	5
Advocacy and Outreach Program.....	5
On-The-Ground Program	6
Strategic Goals	6
Advocacy and Outreach Program.....	7
On-the-Ground Program.....	8
Financial Stability and Sustainability.....	9
Organizational Excellence	9
Measurements of Success	10
Future Action Steps & Strategic Conversations	11
Staff Action Plan.....	11
Board of Directors Strategic Conversations	11
Annual Strategic Plan Review and Updates	12
Appendices	13

Introduction

The Watershed Center Grand Traverse Bay is a US 501(c)(3) nonprofit organization based in Traverse City, Michigan whose mission is to advocate for clean water in Grand Traverse Bay and to act to protect and preserve its watershed. The organization accomplishes its mission through on-the-ground projects, by advocating as the “voice of the bay,” and by engaging citizens and partners in their programs and activities.

The Watershed Center engaged in a strategic planning process from January through May 2017 with the support of consultants Naperala Consulting LLC and Parallel Solutions LLC. The board and staff evaluated their previous strategic plan (prepared 2006, updated 2008), gathered feedback from internal and external stakeholders, and refined their programs and services. The resulting strategic plan and prioritized goals will help to focus time and resources and evaluate measurable outcomes.

This strategic plan aims to provide guidance to the board and staff through the year 2020. The board and staff will annually use the strategic plan to plan and align staff activities, stay accountable to priority goals, and review and modify goals in response to internal changes and external threats and opportunities.

The Watershed Center’s staff is responsible for implementing the programmatic goals in the strategic plan. The board hires and evaluates the Executive Director, who leads and manages a staff of three (3): a Program Director, the GRAND TRAVERSE BAYKEEPER®, and a Director of Community Engagement. The Watershed Center contracts with resource professionals for legal counsel and bookkeeping. The organization may hire seasonal interns to support specific activities.

Data Gathering and Assessment

The Watershed Center’s strategic planning leadership team included board officers and the executive director. They worked with consultants to identify internal and external stakeholders, provide feedback on survey and interview questions, and participate in strategic planning discussions.

Two surveys were distributed to board and staff to invite their opinions about the previous strategic plan, and to gather information about threats and opportunities related to the organization’s restoration efforts, advocacy, education, and financial stability. 100% of the board and staff participated in both surveys. A summary of responses can be found in Appendices A and B.

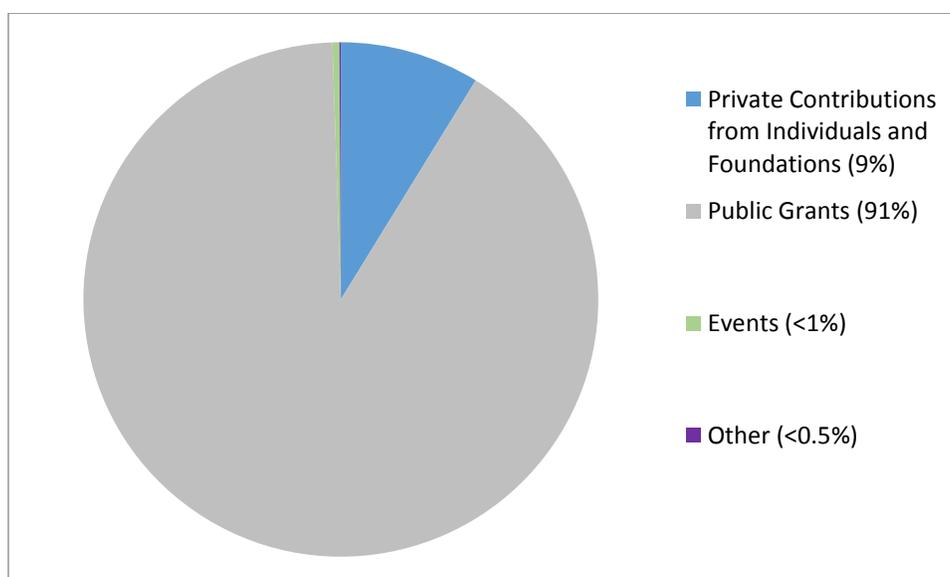
The Watershed Center collaborates with many nonprofits, businesses, and local units of government to implement its mission. Collaborators were invited to complete an online survey to share information about their experience working with The Watershed Center. The survey generated a 25% response rate: twenty-two (22) participants responded to the survey, including fifteen (15) nonprofits, three (3) businesses, and four (4) respondents from the public sector. A summary of responses can be found in Appendix C.

External stakeholder feedback also included targeted interviews with select donors. Donors were asked to share their opinions about The Watershed Center’s programs and projects, organizational performance, challenges and barriers, and donor and communication experiences. Eight (8) donors were interviewed by a consultant. Interviews included previous board members (2), annual donors (2), private foundations (2), and major donors (2). A summary of responses can be found in Appendix D.

The surveys and interviews informed decision-making related to the new strategic plan including programs, projects, audiences, partnership opportunities, outcomes, and funding.

Consultants reviewed The Watershed Center’s current budget and evaluated financial trends. The 2017 revenue projections are provided in the figure below. Appendix E includes the organization’s tax form 990 data from 2001 to 2015 and revenue and expense data over time.

THE WATERSHED CENTER 2017 PROJECTED REVENUE



Affirmation

The Watershed Center’s board and staff are grounded in the organization’s mission statement, and reaffirmed their commitment to the mission, vision, and values of the organization.

Mission: The Watershed Center advocates for clean water in Grand Traverse Bay and acts to protect and preserve its watershed.

Vision: The Watershed Center is the leader in protecting and preserving Grand Traverse Bay’s watershed and achieving broad community commitment to clean water.

Values:

- We use, model, and promote consensus-building, collaboration, and openness to all perspectives on issues affecting clean water in the bay’s watershed

- Our actions, activities, and decision-making are ethical, principled, and based upon the best current science
- We work as advocates, not adversaries, as much as possible, believing there are always ways to resolve issues without jeopardizing clean water
- We believe the water quality of the bay and the economic viability of the region are totally dependent upon one another
- We encourage and seek to achieve behavior change that makes and keeps our water clean
- Above all, we stand up for what is best for the protection and preservation of the entire Grand Traverse Bay watershed

Programs

The Watershed Center serves the 1,000-square mile Grand Traverse Bay watershed and uses the U.S. Environment Protection Agency approved Grand Traverse Bay Watershed Protection Plan (approved 2003, updated 2005) to prioritize its activities and tasks. The organization focuses its resources primarily in city and village centers, and in riparian corridors. Its work falls into two categories of programming: Advocacy and Outreach, and On-The-Ground.

The board and staff evaluated their allocation of time and resources for “proactive” and “reactive” activities and re-defined their two program areas during strategic planning discussions. For the purposes of this planning discussion, “proactive” activities are described as those actions and tasks that the staff plan and initiate and “reactive” activities are motivated by a request for action from others. The Watershed Center’s program descriptions are outlined below with additional detail provided in Appendix F.

Advocacy and Outreach

The Watershed Center is seen as the “voice” of Grand Traverse Bay. The advocacy and outreach program is approximately 65% proactively planned and 35% reactive. Proactively, the organization serves as a “watchdog” regarding local unit of government regulations and provides technical assistance on development projects. Staff evaluates the impact of development on water quality and considers possible solutions. Staff may also review and comment on permits and share concerns or support under public comment periods at government meetings. The Watershed Center proactively provides information and technical assistance to local units of government and communities to encourage water quality protection language in ordinances and plans. Reactive advocacy and outreach work includes responding to citizen calls, questions, and concerns about water quality and the bay.

The Watershed Center works locally in the watershed but may support other organizations working on Great Lakes issues at regional, state, or national levels if the issue directly impacts Grand Traverse Bay. Support is generally shared in the form of letter writing or by informing The Watershed Center’s supporters about a particular issue and how they can take action. Priority organizational relationships from an advocacy lens include the Northern Michigan

Environmental Action Council (NMEAC), For Love of Water (FLOW), Tip of the Mitt Watershed Council (TOMWC), Healing our Waters (HOW), and Waterkeeper Alliance (WKA).

Current projects and activities that implement the advocacy and outreach goals include the organization's affiliation with the Waterkeeper Alliance, the GRAND TRAVERSE BAYKEEPER® position and role, the Healthy Beaches project, the Freshwater Summit, and presentations to civic groups. The Watershed Center's future involvement in the Discovery Center Great Lakes may also support advocacy and outreach goals.

On-The-Ground

The Watershed Center's "on-the-ground" efforts to protect the Grand Traverse Bay are 100% proactively planned. The Watershed Center's role encompasses project and grant management, serving as a convener of projects and activities and collaborating with others on projects that directly impact the protection of the bay. The Watershed Center uses the Grand Traverse Bay Watershed Protection Plan and its own Strategic Plan to prioritize on-the-ground projects. Focused areas of service include green infrastructure, stream restoration, and other stormwater management practices that reduce sediments and nutrients from entering the bay.

The Watershed Center works with local units of government and other willing landowners to implement on-the-ground activities. Other area organizations whose work complements The Watershed Center's work include Conservation Resource Alliance (CRA), Grand Traverse Conservation District (GTCD), Grand Traverse Band of Ottawa and Chippewa Indians (GTBOCI), and Tip of the Mitt Watershed Council (TOMWC).

Recent projects and activities include the Kids Creek Restoration Project in Traverse City and installation of underground infiltration trenches and rain gardens in Suttons Bay. The Watershed Center leads local beach monitoring efforts each summer. The Watershed Center is also a partner in the Boardman River restoration effort, including sediment mitigation and restoration activities. The organization's Adopt-A-Stream program engages citizens, volunteers, and sponsors to monitor the health of the watershed and inform future on-the-ground projects.

Strategic Goals

The Watershed Center board and staff participated in two retreat discussions on April 12, 2017 and April 28, 2017. The discussions focused on defining and refining program areas, creating strategic goals, and identifying priorities. Per the meeting outcomes, The Watershed Center's strategic areas of focus include:

- advocacy and outreach,
- on-the-ground,
- financial stability and sustainability, and
- organizational excellence.

Fourteen (14) specific goals nest within the focus areas and will serve to direct activities and resource allocation over the next three years.

Notes from retreat discussion are provided as Appendix G and a one-page summary and dashboard is provided as Appendix H.

Advocacy and Outreach

Goal 1: Continue to provide technical assistance to local units of government to improve ordinances and master plans.

Discussion: In the fall of 2005, the Northwest Michigan Council of Governments (NWMCOG) reviewed existing master plans and zoning ordinances within the Grand Traverse Bay watershed to evaluate the types of regulatory protection given to water quality and natural resources. As local units of government review and update their master plans, or consider changes to ordinances, The Watershed Center will provide time and resources to priority communities to deliver best practices concerning water quality when suggesting changes to plans and ordinances. The Watershed Center will use a proactive approach to reach out to priority governments that are planning a review or update of their plans or ordinances, and/or will react to contacts and requests for technical assistance from government staff, elected officials, or community members to support the review, discussion, and updates to master plans and ordinances that can impact the water quality of the bay.

Goal 2: Develop a strategy to provide services to guide development in environmentally sensitive areas.

Discussion: The Watershed Center has led advocacy campaigns that have positively shaped water quality protection while allowing for the development of the land. The organization's reputation as a "voice for the bay" has increased community reliance and expectations that The Watershed Center will stand up for water quality. The Watershed Center will determine the best strategy to proactively and reactively work with priority audiences, both those seeking to develop the land and those seeking to protect the water quality of Grand Traverse Bay.

Environmentally sensitive areas are a focus for The Watershed Center's attention and include areas next to a water body or wetland, areas with steep slopes or clay soils, and urban areas.

Goal 3: Continue to develop and refine a monitoring and evaluation system and approach for proactive and reactive water quality concerns that is responsive to citizens and prioritizes threats to the watershed.

Discussion: In recent years, The Watershed Center invested in a full-time GRAND TRAVERSE BAYKEEPER® position. The additional allocation of time, support, and structure for the Baykeeper role provides The Watershed Center an opportunity to advance its advocacy and outreach work. In order to plan for the future direction of the program, the staff created a new system to track data related to proactive and reactive advocacy work, including monitoring local units of government agendas for issues that may impact water quality and responding to phone calls and emails from citizens. The data collection will inform future decisions and support the evaluation of the advocacy and outreach program's activities. The Watershed Center will also evaluate if the data system and data collection methods are useful and effective, and modify them as needed.

On-the-Ground

Goal 4: Partner with local units of government and landowners who are ready to implement green infrastructure, stream restoration, and other stormwater management projects that reduce sediments and nutrients from entering the bay.

Discussion: The Watershed Center has worked to implement priority on-the-ground activities in communities that are in a state of readiness to implement water quality projects. Readiness may include having an updated master plan that seeks solutions to improve water quality; the presence of engaged citizens, staff, or elected officials; and/or grant opportunities that match the unique needs of a community. The Watershed Center has successfully received public grants to implement some priority on-the-ground projects. The Watershed Center will continue to partner with communities and apply for available public funding to implement priority projects.

Communities of focus include:

- City of Traverse City
- East Bay Township
- Garfield Township
- Village of Elk Rapids
- Village of Northport

Goal 5: Develop and deepen community relationships that will drive new projects that improve water quality.

Discussion: The Watershed Center will increase their presence in identified communities and encourage community readiness to implement projects that improve water quality. This may include supporting plan updates, meeting with government staff and officials, conducting grant research, attending public meetings, identifying individual citizens or groups who value water quality, and targeting presentations to specific civic groups in the identified communities.

Communities of focus include:

- Acme Township
- Elmwood Township
- Village of Bellaire
- Village of Kalkaska

Goal 6: Sustain and evaluate monitoring activities to assess the need for and impact of on-the-ground projects.

Discussion: The Watershed Center uses data to support decisions and the prioritization of on-the-ground activities. Currently, The Watershed Center gathers data through regular beach monitoring and the Adopt-A-Stream event. The Watershed Center will evaluate additional water quality monitoring needs and the value these data can provide to the organization.

Financial Stability and Sustainability

Goal 7: Develop a fundraising strategy and implement high-impact activities in support of funding needs and goals.

Goal 8: Grow and deepen relationships with individual donors and private foundations to increase private giving.

Goal 9: Continue to apply for public grants and diversify sources of public funding.

Discussion: The Watershed Center's annual programs and operations are funded by public grants (80-90%), and private contributions from individuals and foundations (10-20%). The board and staff highlighted the organization's relative operational vulnerability due to a dependence on public grants for projects and a lack of diversified revenue. This awareness has informed goals to increase private giving from individuals and foundations, while also maintaining sources of competitive public funding from grants.

The Watershed Center will develop a fundraising plan that considers various audiences (businesses, major donors, annual donors, foundations) and sets target amounts to grow private giving among these audiences. The plan will outline specific activities to engage with the identified audiences to achieve desired outcomes for relationships and for private giving.

The Watershed Center board and staff identified the following potential uses of new sources of unrestricted giving and agreed to evaluate these as plans are made, donor relationships are nurtured, and funds are raised:

- Fund the update of the Grand Traverse Bay Watershed Protection Plan
- Secure additional technical assistance for projects
- Develop an operating reserve fund
- Evaluate market rate of staff salaries and adjust accordingly

Organizational Excellence

Goal 10: Develop a volunteer strategy to connect with people and businesses in support of core programs.

Discussion: The Watershed Center board and staff discussed the idea of creating a "stable of watchdogs" to monitor local government agendas for projects that may impact water quality, or build a "network of voices" to attend local government meetings with talking points or to communicate to congressional leaders. Volunteer group names such as "Watershed Warriors" and "Friends of the Bay" were shared. The Watershed Center board and staff also discussed a desire to increase volunteer participation in the Adopt-A-Stream program, including a focus on the Elk River Chain of Lakes region.

Board and staff agree that volunteers are an important strategy to implement the mission of The Watershed Center. The staff will evaluate the best way to engage volunteers in year one, two, and three of the strategic plan.

There was also agreement among board and staff that the organization will practice their activities using a place-based approach and will focus advocacy and outreach activities in the same locations as on-the-ground activities.

Goal 11: Develop and implement an engagement, communications, and marketing strategy.

Discussion: The board and staff of The Watershed Center discussed the need to develop strategies with clear goals for engaging priority audiences that support water quality. The staff will develop an engagement, communications, and marketing strategy as it relates to priority activities to implement The Watershed Center programs.

Goal 12: Continue to recruit, orient, and support the growth of committed members of the board of directors.

Discussion: The Watershed Center board of directors will continue to use a matrix to identify board members' skills and areas of expertise and will recruit and add new members as needed to support a balanced board and fulfill its responsibilities.

Goal 13: Continue to attract, hire, retain, and support the growth of a talented professional staff.

Discussion: The Watershed Center will strive to provide a positive, healthy work environment. It will engage employees to seek appropriate development opportunities and practice a culture of direct feedback, encouraging growth and learning. The organization will offer competitive wages and traditional and non-traditional benefits to support the retention of staff. The Watershed Center will recognize and reward staff, practicing a culture of gratitude and appreciation.

Goal 14: Continue to cultivate a culture of innovation and learning by evaluating the success and impact of programs and activities.

Discussion: The Watershed Center's strategic planning retreat discussions and leadership team follow-up discussions included a repeated theme and desire for continuous organizational improvement. The focus areas and goals identified in the strategic plan, as well as programs and activities to be developed and implemented by staff, will be evaluated, modified, and improved on an ongoing basis. The organization will use its existing board and staff meetings to provide time for evaluation, feedback, and learning to support the growth of individuals and the organization.

Measurements of Success

In order to evaluate the impact of strategic goals and activities, The Watershed Center identified the following measurements of success:

Advocacy and Outreach

- Number of local municipal plans and ordinances with water quality protection elements
- Developed service strategy for development in environmentally sensitive areas, including measurements of success
- Number of citizens engaged in advocacy

On-the-Ground

- Number and types of high-impact projects (project status over time)

- Number of communities engaged in high-impact projects (project status over time)
- Enhanced strategy for monitoring activities, including measurements of success

Financial Stability and Sustainability

- Increased private donations
- Number of private donors and increased average size of gifts
- Number and diversity of successful grant applications

Organizational Excellence

- Developed volunteer strategy, including measurements of success
- Developed engagement, communications, and marketing strategy, including measurements of success
- Board/staff recruitment, retention, and self and peer performance evaluation
- Explored long-term and systems-based roles in key regional collaborations

Several of The Watershed Center's strategic goals focus on the development of new business strategies for programs: volunteer engagement, marketing and communications, fund development, and services to help guide development in environmentally sensitive areas. Each new strategy will have specific goals, measurements, and timelines.

Future Action Steps & Strategic Conversations

Staff Action Plan

The staff will structure its annual work activities to align with the goals of the strategic plan. A staff work plan template is provided as Appendix I. Using the goals of the strategic plan and the dashboard, staff will provide clear and concise reports to the board at least quarterly.

Board of Directors Strategic Conversations

The board has a standing agenda item at its monthly meetings to discuss strategic direction and will use this time to discuss and achieve clarity regarding important topics identified during the strategic planning process.

Topics identified for future discussion included:

- Refining additional measurements of success at the October 2017 board retreat, based on a review of the staff work plan to be completed by September 2017
- Refining the Executive Director's report format so that it aligns with new strategic goals
- Board calendar that identifies strategic topics to be discussed at upcoming board meetings
- Investing in major gifts fundraising training and coaching
- Developing criteria and decision-making processes to evaluate when to initiate and motivate the action of citizens about an issue or policy development project
- Developing criteria and decision-making processes to respond to a plea or invitation to join with a group of citizens to help advocate about an issue/policy or development project

- Developing criteria and decision-making process to evaluate when to participate in a request to join a lawsuit
- Defining The Watershed Center's role and vision for the Discovery Center Great Lakes campus
- Defining The Watershed Center's goals and desired outcomes for its relationship with Rotary Camps and Services and other Discovery Center Great Lakes partners
- Deciding how The Watershed Center will position itself in the Elk River Chain of Lakes watershed, including related to priority projects, partners, service overlap, competition, etc.
- Determining The Watershed Center's role in the Boardman River watershed, including an evaluation of a long-term convener role once dam removal is complete
- Assessing opportunities for the long-term monitoring of water quality including what, where, and how, and a revenue and business model for this activity

Annual Strategic Plan Review and Updates

The Watershed Center may plan an annual board retreat to evaluate the strategic plan, and staff will share the measurements of success for the programs, finances, and organizational excellence with the board. The board will annually discuss the goals of the strategic plan and determine if they need to be modified for the following year.

Appendices

- A. Summary Report of Board and Staff Survey to Review the Current Strategic Plan
- B. Summary Report of Board and Staff Survey to Review Programs
- C. Summary Report of Collaborator Survey
- D. Summary Report of Donor Interviews
- E. Financial Overview (990 data, 2001 - 2015)
- F. The Watershed Center Program Descriptions (2017 strategic planning retreat program worksheets)
- G. Retreat Notes: Discussion of Advocacy and Education, and Draft Program Goals Discussion
- H. One-Page Strategic Plan Dashboard
- I. Staff Action Plan Template