

Santa Fe Conservation Trust
Organizational Needs Assessment
June 4, 2014

Will Murray
will@willmurraycompany.com
303.550.4974

Santa Fe Conservation Trust

Organizational Needs Assessment

Summary

In June, 2014, the board and staff of the Santa Fe Conservation Trust participated in an organizational needs assessment aimed at enhancing their ability to pursue the Trust's mission. With funding support and expertise from the Land Trust Alliance, the Trust identified concrete actions to strengthen the organization at this pivotal time in its history.

Key findings in the assessment include the need to expand staff capacity to meet existing and future workloads and the board's continuing role in raising operating and capital funds.

Background

The Santa Fe Conservation Trust has achieved many significant conservation gains in its history, and has submitted its application for accreditation to the Land Trust Alliance accreditation commission. The Land Trust Alliance provided funding for this assessment project and supplied the time and expertise of Shannon Meyer to undertake an organizational needs assessment to guide the capacity enhancement strategy for the Trust.

Methods

The Land Trust Alliance contracted with an independent consultant, Will Murray, to conduct the organizational needs assessment with the help of the board and staff. Will interviewed by phone 10 board members, all four staff members, Shannon Meyer of the Land Trust Alliance. Will held several calls with the executive director and with many resource people outside the Trust board and staff. The overall number of people interviewed in person or by phone totaled 18. He also reviewed seminal documents including by-laws, financial statements, the strategic plan, committee charters, work plans and other foundational documents. Will paid two visits to the Trust's office.

Will then led the group through an organizational needs assessment planning session on June 4, 2014.

The assessment method focused on these areas:

Organizational Identity

- Mission
- Core values
- Methods

Internal factors

- Strategy
- Style
- Skills
- Staff
- Systems
- Structure
- Sustainability of Funding

Driving Forces

- External Forces (opportunities and obstacles)
- Competition
- Climate for fundraising

Findings

Given the decisions of staff and board to enhance the Trust's capacity, the Trust appears very strong in its ability to pursue its mission toward greater conservation gains. At the current level of staffing, the organization is below capacity to sustain its present level of effort, especially with land transactions, easement monitoring and major donor fundraising. The group's decisions during the June 4 session to expand staff capacity and fundraising efforts to support the new staff substantially increase the Trust's prospects for the near future.

Organizational Identity

Mission

Board and staff all can articulate a description of the Trust consistent with the existing mission statement. While none actually recited the actual mission statement during interviews, their description was in alignment with the written mission statement:

The Santa Fe Conservation Trust is dedicated to preserving the spirit of place among the communities of northern New Mexico by protecting open spaces and critical wildlife habitat, by creating trails, and by protecting the traditional landscapes of our diverse cultures.



Figure 1. The organization's mission and core values specify boundaries for its methods and activities.

Core Values

The Trust's core values, along with the mission, serve as a sidebar to methods and activities. Staff and volunteers who represent a good fit for the organization share these same core values, which enable them to act consistently in congruence with the style of the organization.

The Trust has a well-developed statement of core values:

Legacy

We strive to deliver the highest degree of public benefit through land conservation initiatives by working cooperatively with willing landowners and the community to achieve common goals. And we will work tirelessly for the benefit of future generations to preserve a legacy of land conservation in northern New Mexico in which the community is the primary beneficiary.

Sense of Place

We respect private property rights and acknowledge the importance of preserving "sense of place" for the common good.

Excellence

We will strive for continual improvement and innovation in all that we do. Our standards will reflect the premier status to which we aspire.

Integrity

We will be accountable to those we serve and from whom we receive support. Honesty will be reflected in our communications and our actions. We will uphold the highest standards of ethics and conduct in all we do.

Openness

We will include the rich diversity of humankind in all aspects of our work. We will hold respect for individual differences. We will provide access for all who can benefit from our programs.

Sustainability

We will manage our resources in ways to meet the needs of the present without compromising the options of the future.

In addition, the Trust has articulated its long-range vision of success:

This mission aims to protect and enhance key natural areas, ranch and agricultural lands, river and stream corridors, trails and the natural open lands that define and sustain our rich and memorable landscape.

We accomplish our mission by working with people in culturally diverse communities in ways that enhance community values, create meaningful connections between people and the land, preserve heritage and encourage collaborative action.

Westerners are shaped by the land, held by its distances, fed by its grasses and grains, protected by its ridges and ranges. We obtain water in arroyos, shelter beneath cottonwoods and piñons, and derive our culture from the trails that have linked us to the Aztecs, Chaco, Mexico, and Missouri. This is our past and we hold it in trust for our future.

The mission statement, vision of success and core values are contained in one document appearing here as Appendix 1.

Methods

The Trust's main methods of pursuing its mission include:

- Land protection through conservation easements
- Honest broker and facilitator with landowners
- Plan, establish, provide easements for and maintain trails
- Maintain dark night skies through education
- Raise funds for transactions, monitoring and operations

Internal Factors

Strategy

The Trust's overall strategy is to work with landowners to protect from development lands consistent with its mission. The Trust strives to remain available and responsive to landowners who might want to pursue protection of their property. It uses a strategic conservation plan to identify focus areas for judging opportunities and pursuing proactive outreach to landowners.

The Trust serves a pivotal role in the alliance toward construction of the Grand Unified Trail System.

Along with its land protection and trails work, the Trust uses education methods to protect dark night skies.

Style

The style of the Trust is described as:

- Professional yet approachable
- Highly competent at real estate transactions and trail projects
- Social and engaging
- But low key
- Hard working
- Fiscally conservative

Skills

Staff and board identify these essential skills of the Trust

- Relating to landowners to develop projects
- Land transactions and project management
- Trail easements, construction, maintenance
- Conservation easement stewardship and financing
- Public and private fundraising for projects and operations

Staff

Staff report that their workloads are beyond maximum sustainability at this time. Board and staff believe that additional staff capacity in land protection, stewardship, development and outreach will be

necessary for the Trust to reach higher levels of conservation success. The board has tasked the executive director to develop a staffing proposal and budget for the next year or two to take advantage of land protection opportunities and stewardship work represented by 77 easements encompassing 35,000 acres.

There is no written succession plan for the executive director addressing short- or long-term turnover. In an organization of the Trust's size, in which individual staff members carry an extraordinary burden for the Trust's success, having transition plans in place is vital. The Trust, while highly successful and expanding in its capacity, is at this point still very dependent on the executive director for its success and would benefit from planning an orderly succession in case it is needed.

Systems

Having recently submitted its application for accreditation to the Land Trust Accreditation Commission, the Trust's systems seem to be in good shape.

The **Information Technology** system has a workable, financial reporting system and communication functions. Data security and backup systems seem to be in place. The donor and land database software is obsolete and its replacement has been a staff priority for some time. Staff are now planning to migrate to Salesforce using a third-party application specifically developed for land trusts.

The **Financial** system seems functional in terms of recording, reporting, budget development, supporting audits and tracking and investment of funds. It is not clear from committee charters which board committee has oversight for tracking the annual budget.

The **Planning** system seems to function workably. The Trust has an annual plan that guides its annual budget and is largely derived from its strategic plan. It has an annual fundraising plan. It does not have a written marketing or external communication plan to focus and drive its work to engage the community and hone in on target audiences.

The **Monitoring** system seems to be functioning well, as the Trust has a program to make an annual monitoring visit with each easement holder and document the results of those visits. From committee charters, it is not clear which board committee has oversight for easement monitoring.

The **Governance** system is focused on setting direction, establishing policy, providing accountability for results and representing the Trust to the community. Most importantly, the board is committed to raising the necessary funds, in concert with staff, to propel the organization forward. Most or all of the board members as individual volunteers also help with stewardship, fundraising, community outreach and other activities.

The Executive Committee of the board annually evaluates the performance of the executive director, but the entire board does not conduct any periodic evaluation of the organization's progress.

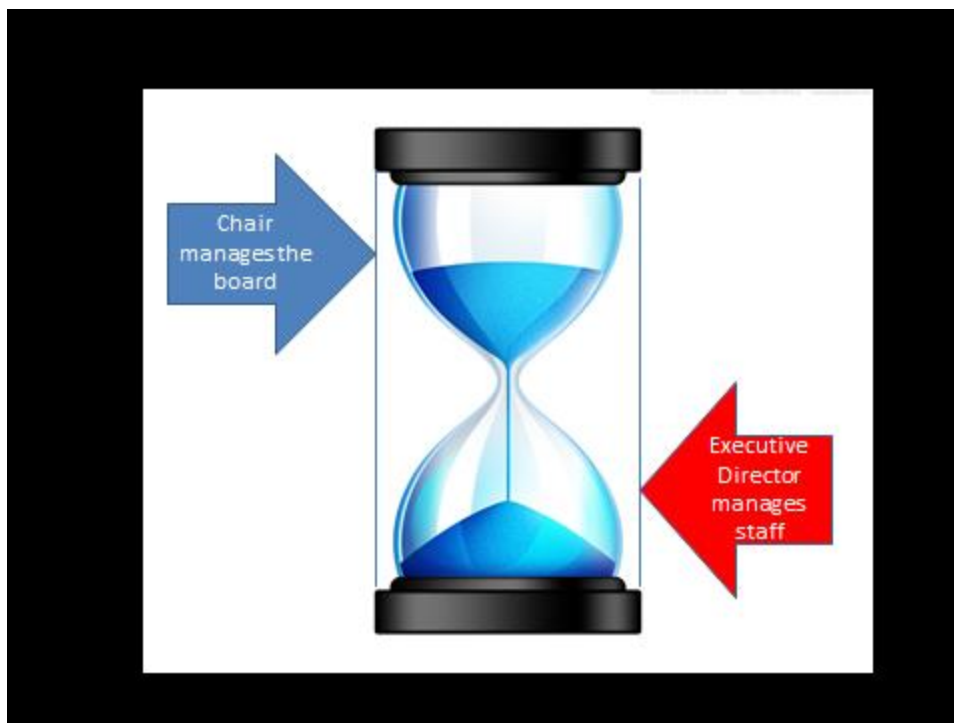


Figure 2. The board sits atop the organization, managed by the chair; the staff implement the board's directives, managed by the executive director.

The chain of command regarding staff seems clear, with the executive director managing staff without board interference.

Board member recruitment is an ongoing area of the board's focus, guided by a sense of key attributes for prospective members.

Structure

The staff structure seems functional. Staff members can articulate clear lines of authority, decision and communication pathways, channels for accessing key information necessary for them to do their jobs, and ability to garner valuable advice in making important decisions.

The board is focused on structural alignment as well, with each strategic goal relating to a specific board committee. Not all board committees are equally effective in completing work between committee meetings, something that the group wishes to improve.

Sustainability of Funding

The Trust has a strong fundraising program in place, influenced greatly by the need for operating funds and capital funds for conservation easements, and the endowments and annual funding needed for their perpetual stewardship.

The board members are enthusiastically active in helping to identify prospective donors with the means and interest to give to the Land Trust, introducing those people to the Trust and enhancing relationships with it, soliciting gifts, and thanking donors to keep them informed about how their gift made a positive difference. The board members also contribute personally to the Trust's operations funding needs.

Driving Forces

External Forces

Those forces outside the control of the Trust which are most likely to have the biggest impact on the Trust's ability to pursue its mission in the next five years include:

- Much more opportunity for land conservation projects. There are many landowners who do not yet have a relationship with the Trust who could benefit from protecting their property.
- The momentum toward the Grand Unified Trail System, a long-range vision for a trail system to encompass and interlink trails throughout the Santa Fe area. The Trust plays a pivotal role in the partnership pursuing this system, and must have sufficient staff to encourage momentum and serve as a hub for the partnership.
- Strong climate for philanthropy for the Trust's work, with many more major donor prospects to engage.
- Broad competition in the fundraising area, with 487 NGOs in the community.
- The present and future situation for water as a limiting resource.

Competition

Competition is sharp for donors among the many non-profit organizations in the area. The Trust continues to develop strategies to differentiate itself from other charitable organizations in pursuit of positioning itself in the mind of the donor community as the go-to local organization for land conservation in the region.

Climate for Fundraising

The overall climate for fundraising for the Trust is strong. Santa Fe supports a large number of non-profit organizations, especially for a community of its size. The climate for large grants and institutional donations for transactions and planning projects (e.g. Land Trust Alliance's support for this project) remains strong, as does the Trust's ability to access those funds. Board and staff believe that there are many potential donors who do not yet know the Trust and would be excited to participate if approached in the right way.

Recommended Actions

The Trust continues to succeed in protecting and conserving lands with high conservation value in its service area. Many of its practices, activities, structures and systems work well for it to pursue its mission with enthusiasm and relish.

These recommend actions can only be accomplished successfully with a strong partnership between board and staff. The executive director, working together with committees and individual board members, has a key role in assembling the needed capacity to move the organization forward, yet cannot do this alone. The enthusiasm that the board demonstrated during the planning session is a strong positive sign.

Based on this organizational needs assessment, as author of this document I would like to propose these recommended actions to enhance the potency of the Trust to make substantial gains toward its mission. The lead responsibility refers to the appropriate committee to provide oversight and accountability, with the actual work to be done in a partnership between board and staff.

Action 1. Create a fundraising campaign design document for board consideration.

- Develop a slate of conservation projects and uses of funds schedule including:
 - Transaction costs
 - Stewardship endowment contribution
 - Staff operating costs
 - Operating endowment
 - Fundraising and communication costs
- Identify internal capacity needs (staff, board, contractors) and a funding goal
- Develop overall campaign goal and design
- Gain board adoption

Lead Responsibility: Development and Communication Committee.

Due Date: Summer, 2014

Action 2. Enhance the Development and Communications Committee.

- Connect to the campaign
- Create a Campaign Committee

Lead Responsibility: Development and Communication Committee, Governance and Nominating Committee.

Due Date: Fall, 2014

Action 3. Increase deal flow.

- Identify slate of potential projects
- Connect to the campaign

Lead Responsibility: Land Committee

Due Date: Summer, 2014

Action 4. Create an operating endowment (board restricted) account.

- Connect to campaign and planned giving program

Lead Responsibility: Executive Director

Due Date: Summer, 2014

Action 5. Increase visibility: Create and gain board adoption of new external communication plan.

- Connect to 20th anniversary
- Develop new collateral materials as necessary

Lead Responsibility: Development and Communication Committee

Due Date: Summer, 2014

Action 6. Enhance staff capacity for protection work and free up the executive director for other tasks.

- Develop job description, recruit and hire new position
- Consider using operating reserve funds to hire the first new position in advance of the campaign implementation to relieve critical staff shortages as soon as possible
- When developing new position job description, Revise ED job description with new position in mind

Lead Responsibility: Executive Director

Due Date: Summer, 2014

Action 7. Create an Executive Director succession plan, short- and long-term.

Lead Responsibility: Governance and Nominating Committee

Due Date: Summer, 2014

Action 8. Increase effectiveness of board committees.

- Conduct evaluations of each committee and develop an action plan

Lead Responsibility: Executive Committee

Due Date: Winter, 2014-15

Action 9. Gain agreement on area of coverage of service area in the future.

Lead Responsibility: Land and Executive committees

Due Date: Winter, 2014-15

Action 10. Initiate discussions with Taos Land Trust.

Lead Responsibility: Executive Committee

Due Date: Summer, 2014

Action 11. Acquire and install new database software.

- Select, install and populate
- Complete training for all staff and volunteers using the database

Lead Responsibility: Audit and Finance Committee

Due Date: Fall, 2014

Action 12. Conduct an annual evaluation of progress toward the Trust’s strategic plan.

Identify objectives met, progress toward goals and areas of slow progress.

Identify changes in the operating environment that would warrant a change in strategy, and revise the strategic plan and annual plan as necessary.

Select items that serve as cause for celebration.

Lead Responsibility: Executive Committee

Due Date: Fall, 2014

Conclusion

The Trust is in a strong position to expand its capacity in order to advance strongly in pursuit of its mission. It is poised at a pivotal place, with an accumulated body of successful transactions which require perpetual monitoring, and with a great deal of opportunity for additional land conservation, trails and night sky projects in its future path. The agreement of the board to pursue a vigorous course of action to enhance staff capacity and board capacity now, while the opportunities are ripe, is an encouraging sign. Giving the executive director instructions to develop and implement an enhanced staffing plan is a key first step that will propel the other capacity-building actions forward.

Acknowledgements

Thanks to the board members, staff members and Shannon Meyer for their time, insights and efforts contributing to this assessment and the strategic plan, and for their heart, passion and dedication to protecting and preserving the special nature of one of the great places in the world. Thanks also to the outside resource people who participated in interviews.

Appendix 1.



Our Mission

The Santa Fe Conservation Trust is dedicated to preserving the spirit of place among the communities of northern New Mexico by protecting open spaces and critical wildlife habitat, by creating trails, and by protecting the traditional landscapes of our diverse cultures.

Our Vision

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Our Values

Legacy

We strive to deliver the highest degree of public benefit through land conservation initiatives by working cooperatively with willing landowners and the community to achieve common goals. And we will work tirelessly for the benefit of future generations to preserve a legacy of land conservation in northern New Mexico in which the community is the primary beneficiary.

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Openness

We will include the rich diversity of humankind in all aspects of our work. We will hold respect for individual differences. We will provide access for all who can benefit from our programs.

Sustainability

We will manage our resources in ways to meet the needs of the present without compromising the options of the future.

Appendix 2.

Documents Viewed

By laws Dec 2 2010
Board and staff roster
Land protection map
Budget 2014 Nov 2013
Mission and values statement
Financial statement Jan Feb 2014
Fundraising work plan July 2012
Strategic conservation plan
Strategic Plan Draft 2009
Communications Committee Charter 12/2010
Development Committee Charter
Audit and Finance Committee Charter 12 2010
Governance and Nominating Committee
Charter
Land Review Committee Charter Apr 2011
Climate Change and the Santa Fe Basin:
2013 Newsletter
Annual Report 2013

A Preliminary Assessment of Vulnerabilities and
Adaptation Alternatives

Interview Participants

Margaret Alexander
Mary Pat Butler
David Chase
Harlan Flint
Melissa Houser
Richard Hughes
Jan Willem Jansen
Kent Little
Preston Martin
Tom McCampbell
Shannon Meyer
Joanna Prukop
Laurel Savino
Terry Smith
Janet Stoker
Kimball Udall
Stephen Velie
McAllister Yeomans