



5-Year Strategic Action Plan (July 2023-June 2028)

The mission of Pee Dee Land Trust is to conserve and promote an appreciation of the significant natural, agricultural, and historical resources of the Pee Dee Watershed of SC.

Key Goals and Strategic Objectives

Protecting Land

Goal: Permanently protect high conservation value land, both directly through conservation easements and in collaboration with organizations; and responsibly steward PDLT's existing fee owned property and conservation easements.

Objective: Protect at least 12,500 additional acres of land in the Pee Dee, averaging at least 2,500 acres per year across at least 30 projects. Steward all conservation easements and fee properties.

Ensuring Organizational Excellence

Goal: Garner, organize, and invest the necessary resources and support required to continue the work of PDLT in an efficient and effective manner.

Objective: Retain and recruit quality staff and board members committed to PDLT's success.

Building Financial Sustainability

Goal: Secure financial support to sustain current and future operations and strategic projects.

Objective: Continue to build major operations support, fundraiser revenue, endowments, planned giving, fee donations and work to diversify assets.

Growing our Conservation Community

Goal: Foster a community of conservation-minded individuals and organizations who understand the interconnectedness of people and the land, who appreciate the natural, agricultural and historical features of the region, and who believe in the importance of purposeful protection of the resources Pee Dee Watershed.

Objective: Maintain current financial supporters and volunteers, while continuing to recruit new support of individuals and businesses.

Expanding Community Relevance

Goal: Increase community awareness of the impact of our work for ALL people.

Objective: Partner with organizations to enhance land protection in our watershed. Relevance campaign combined with grassroots outreach accomplished through PDLT communications, presentations, media and event presence. Enhance PDLT's reputation as the go-to land trust in the Pee Dee Watershed.

1 - Protecting Land

Focus Goal: Permanently protect high conservation value land, both directly through conservation easements and in collaboration with organizations; and responsibly steward PDLT's existing fee owned property and conservation easements.

Objective: Protect at least 12,500 additional acres of land in the Pee Dee, averaging at least 2,500 acres per year across at least 30 projects. Steward all conservation easements and fee properties.

1 - Conservation Easements:

- Protect at least **12,500 additional acres** of land in the Pee Dee, averaging at least **2,500 acres per year** across at least **30 projects**.
- Double number of protected acres from 40,000 to 80,000 before 2050 (27 years), with a stretch goal to surpass 100,000 acres
- Continue to improve the CE processes and update documents as needed to stay current with evolving IRS requirements and nationwide trends
- Further utilize Landscape's capabilities in project management and stewardship
- Update all County and Focus Area strategic maps with corresponding priority property listings; include additional pertinent layers to the matrix

2- Landowner Outreach:

- Organize & implement 3 strategic area Landowner Gatherings annually
- Update Landowner Guide & print as needed; update on website
- Engage current CE landowners to share their experience with their neighbors/networks in small gatherings to help influence connectivity of current protected lands
- Invite professionals practicing in the area to Landowner Gatherings
- Present to industry specific groups and organizations of professionals that work with landowners (CPA, Banker, Investment Brokers, Realtors, Foresters, Appraisers, Surveyors)
- Partner with other organizations for landowner outreach initiatives; Engage more organizations focused on female and minority stewardship

3- Bargain Sale Grant Funding:

- Strengthen relationships with funder organization's staff (SCCB, NAWCA, NRCS, LRCF)
- Close the first ACEP and RCPP CE projects
- Research new potential funding sources
- Hire Grant Writer to assist with applications and reporting for bargain sale funding (contract position; as needed)
- Partner with other land trusts for Federal Funding (i.e.: NAWCA)
- Partner with Open Space Institute to utilize DMF revolving land fund
- Explore local funding sources; Help create a Pee Dee Watershed Fund and/or County Funds

4- Steward Current CE's:

- Successfully monitor all CE's annually with high quality documentation
- Engage CE landowners during annual monitoring and share stewardship information
- Engage Board Members to participate in monitoring visits
- Proactively manage ownership transfers and orient new landowners
- Hire and train new Stewardship Associate; Transition current Stewardship Associate into role as CE Project Manager

5- Steward and Enhance Current Fee Properties (Dargan & Mozingo):

- Trail maintenance, parking area and water access points
- Host one free public community edutainment experience annually
- Engage volunteers to help staff with annual property clean-up
- Evaluate opportunities for additional fee ownership for timber management tract

6- Public Access Projects:

- Engage County and Municipal staff if opportunities are presented for potential fee purchase for public access properties; Fully engage in projects if the property will require a CE

2- Ensuring Organizational Excellence

Focus Goal: Garner, organize, and invest the necessary resources and support required to continue the work of PDLT in an efficient and effective manner.

Objective: Retain and recruit quality staff and board members committed to PDLT's success. Invest in resources and continuously evaluate policies and expenditures.

1- Board of Directors:

- Recruit and engage new Board Members committed to PDLT's mission and willing to commit their time and talents
- Engage and continuously educate current Board Members
- Reengage past Board Members to serve as Community Members on Committees and special projects

- Fully engage all committees; annually evaluate committee membership

2- Staff:

- Retain quality staff
- Recruit new staff; Easement Steward (full time) and Grant Writer (contractor as needed)
- Personal development for staff to further their knowledge and skills
- Cross train staff within departments considering interests and skills
- Annual staff performance evaluations; Evaluate compensation and benefits annually
- Upgrade and invest in new technology and equipment as needed to increase efficiency and effectiveness

3- Infrastructure & Equipment:

- Maintain current office property; Create additional handicap access
- Upgrade technology equipment as needed for optimal efficiency and security
- Build education Pavilion Building

4- Policies & Best Practices:

- Review all policies and refer suggested updates as needed to Board Committee
- Continue to create new and update SOPs
- Utilize partner organizations to learn about new best practices (LTA, SCLTN, Together SC, SustainSC, SCMA, SCFA /SCFC, SCDA)
- Land Trust Alliance Reaccreditation (2027)

5- Vendors:

- Evaluate all insurance policies and bid out periodically
- Evaluate all vendors and service providers; bid out periodically

6- Chandler Award:

- Honor individuals who have helped PDLT make significant impacts to grow land conservation in the Pee Dee Watershed
- Direct solicitation for Chandler Award fund as needed to purchase new awards and help cover expenses for presentations

3- Building Financial Sustainability

Focus Goal: Secure financial support to sustain current and future operations and strategic projects.

Objective: Continue to build major operations support, fundraiser revenue, endowments, planned giving, fee donations and work to diversify assets.

1- Event Sponsorship and Revenue:

- Grow Fundraiser Revenue to exceed \$100,000 annually
- Staff to meet with sponsors annually to plan sponsorship for the entire year
- Solicit new businesses for sponsorships
- Secure high quality auction items; consider live auction for a specific item(s)
- Secure sponsors for specific Edutainment Experiences

2- Operations and Special Project Grants:

- Research and apply for new operations and special project grants
- Strengthen relationship with current Grantor's staff and Board
- Increase current grant amounts if possible

3- Major Operations Donors:

- Cultivate new multi-year major operations donors
- Grow relationships with current major operations donors

4- Endowments:

- Collect outstanding pledges from Our Places Operations Endowment Fund
- Solicit new Operations and Scarborough Opportunity Fund donors
- Strategically spread out major gifts between funds based on donors wishes
- Explore future Operations Endowment campaign

5- Planned Giving:

- Create planned giving publication for distribution (print and digital)
- Engage estate planners

6- Fee Gifts:

- Create fee gift publication for distribution (print and digital)
- Evaluate potential for fee ownership and management vs sale or transfer to a public entity

7- Investments:

- Monthly and quarterly distribution of investment reports to Investments Sub-committee; Investment reports to Board at Quarterly meetings; Annual Investments Sub-Committee meeting with Investment manager.
- RFP for Investment manager (periodically as recommended by the investment policy)

8- In-Kind Donations:

- Solicit in-kind donations of services and products for fundraisers and edutainment events
- Solicit in-kind donations of services and products for operations and fee property

9- Budget:

- Continuously update budget forecasts throughout the fiscal year
- Create flexibility within the budget to maintain ability to pivot

4- Growing our Conservation Community

Focus Goal: Foster a community of conservation-minded individuals and organizations who understand the interconnectedness of people and the land, who appreciate the natural, agricultural and historical features of the region, and who believe in the importance of purposeful protection of resources in the Pee Dee Watershed.

Objective: Maintain current financial supporters and volunteers, while continuing to recruit new support of individuals and businesses.

1- **Membership:**

- Maintain an 80% annual member retention rate
- Achieve at least a 15% growth in membership revenue
- Maintain the median membership level above \$150
- Increase the number of members in all counties with a focus on the least saturated
- Host Membership socials in the least saturated counties
- Create and market a Legacy Membership Level

2- **Volunteers:**

- Recruit volunteers outside of the board and staff family members
- Research viability to partner with AmeriCorp as potential volunteers for specific projects

3- **Edutainment:**

- Host 2-3 Edutainment experiences annually; 1-2 paddles + 1-2 unique experiences to provide a low-cost opportunity to connect to the land/water
- Host at least 1 experience annually that will appeal to children and young adults

5- Expanding Community Relevance

Focus Goal: Increase the community awareness of the importance of the impact of our work for ALL people.

Objective: Partner with organizations to enhance land protection in our watershed. Relevance campaign combined with grassroots outreach accomplished through PDLT communications, presentations, media and event presence. Enhance PDLT's reputation as the go-to land trust in the Pee Dee Watershed.

1- Communications:

- Update website; Optimization of online presence
- Annual newsletter; Printed and Mailed
- 2 E-newsletters a month
- 4+ posts on social media monthly (Facebook, Instagram, Twitter)
- Finalize videos in progress and create landowner testimony short videos
- Continuously update donor database and distribution lists
- Develop and distribute impact fact sheet
- Direct outreach to local, SC and Federal legislators and staff about pro land protection policy and funding

2- Press Releases / Media:

- Timely press releases on all CE's and events
- Op-eds written by staff, Board and CE landowners
- Invite media to attend strategic events
- Send printed press releases and invitations to local, SC and Federal legislators
- Monitor for news pick-ups or republications

3- Paid Advertising:

- Strategically placed ads in publications
- Research and purchase ad space in publications with minority* readership

4- Presentations / Events:

- Present to civic and professional organizations throughout the Watershed
- Create and purchase mobile displays
- Completed Conservation 101 video presentation
- Staff and Board to represent PDLT at strategic events
- Prioritize booth presence based on audience and timing

5- Partnerships:

- Prioritize time spent on Partnerships based on return on investment
- Engage all full time staff as a representative in at least 1 partnership; Engage board members interested in representing PDLT in Partnerships
- Partner with organizations and groups that are actively engaging with minority and female landowners
- Engage Municipal and County staff; Comment on comprehensive plans and special projects in reference to land protection efforts

**Minority in this document is in reference to non-Caucasians; The 9 counties that make up the Pee Dee Watershed have the following populations by race as of the 2020 Census: 64.1% Caucasian, 29.4% African American and 6.5% non-Caucasian or non-African American; However, 4 of the 5 counties majority population is African American (Horry County has by far the largest population and has the largest percentage of Caucasian population)*