



Laudholm Trust FY2015-2019 Strategic Plan

Approved by the Laudholm Trust Board of Trustees
November 4, 2014

Table of Contents

About the Wells National Estuarine Research Reserve and Laudholm Trust.....	2
Why a Strategic Plan?	3
Statement of Strategic Direction.....	3
Performance Assessment	5
Areas of Advancement	6
Conclusions	9

About the Wells National Estuarine Research Reserve and Laudholm Trust

The [Wells National Estuarine Research Reserve](#) (“Wells NERR”) works to expand knowledge about coasts and estuaries, engage people in environmental learning, and involve communities in conserving natural resources, all with a goal of protecting and restoring coastal ecosystems around the Gulf of Maine. The Wells NERR is part of [a system of 28 reserves](#) across the nation overseen by the National Oceanic and Atmospheric Administration (“NOAA”) and annually funded by appropriations set forth in the [Coastal Zone Management Act of 1972](#).

Unlike many reserves in the system, the Wells NERR’s federally-mandated state partner is not a state agency or university. The local nonprofit Laudholm Trust instead fills that role, raising the essential local matching funds to NOAA’s annual operating grant and other competitive government grants. The Boards and staffs of the Wells National Estuarine Research Reserve and the Laudholm Trust co-operate the site as a public-private partnership; we currently refer to our joint venture as the “Wells Reserve at Laudholm” for short.

Each operating organization contributes its particular expertise to the Wells Reserve at Laudholm. Just as our freshwater rivers meet our saltwater sea, the worlds of science and art, federal and local, past and present mix together at the Wells Reserve at Laudholm.

Laudholm Trust Mission Statement

[Laudholm Trust](#) is dedicated to advancing the coastal research, education, and stewardship programs of the Wells Reserve at Laudholm and to preserving its historic buildings. The Trust strives to extend its unique legacy by galvanizing community support and inspiring actions that protect Maine's coastal environments.

The Wells Reserve at Laudholm spans 2,250 acres of marsh and farmland tucked away on the southern coast of Maine. With three estuaries, a sandy beach, fragile dunes and wetlands, forests, fields, laboratories and classrooms, the site is a nationally-recognized coastal research, education, and monitoring facility. But the Wells Reserve at Laudholm is not just a NOAA outpost. Since a group of citizens first banded together to save the property in the late 1970s, this protected place has continued to evolve from a 19th century saltwater farm into a center for science and communities to connect.

There is nowhere else like here. The Wells Reserve can draw on its local support, its national prominence, its salty and fresh and past and present to bring people of all persuasions together to understand a changing world in a timeless place.

Why a Strategic Plan?

While the Wells NERR must submit and gain approval from NOAA on a Management Plan for the Reserve every five years (the 2013-2018 management plan is available only and at the Reserve’s headquarters), the Laudholm Trust has no such authorizing overseer. It is the Board of Trustees of Laudholm Trust who, with input from the Wells NERR staff and community, must set and approve the strategic direction for the Trust.

To that end, the Trust launched a strategic planning process in June 2013. Facilitated by consultant Craig Freshley from Good Group Decisions, the process included guided meetings with the Board of Trustees, the Reserve Management Authority, the staffs of both the Reserve and the Trust, and even, through a catered dinner in the Barn in October 2013, more than 75 Laudholm Trust members and neighbors. Laudholm Trustees also made more than two dozen phone calls to local leaders and luminaries, and the Trust staff solicited email and phone comments as well. The findings from these activities were summarized in a lengthy “Findings” document and were used as the nuclei of this “Strategic Plan.”

The Trust’s next five-year vision for the Wells Reserve at Laudholm is predominantly to support the Wells NERR’s 2013-2018 Management Plan. But as the Reserve’s nimble, community-based, and revenue-diverse nonprofit arm, the Trust can also work more to develop the Reserve into a **regional center for the public understanding of coastal environmental issues (such as climate change - see sidebar) through science and the arts**. Through field research, environmental education programs, lectures, and training workshops, and also performances, art installations, and major festivals, the Reserve will teach our neighbors and visitors, however they learn, about the challenges and opportunities facing our coast. We seek to make a measurable difference in public perceptions and behaviors in Southern Maine, to put ourselves on the map, and to do everything we can to bring our mission to as many people as possible.

Statement of Strategic Direction

The Laudholm Trust has been working to advance the Wells Reserve at Laudholm for more than a generation. However, over the next five years, as environmental awareness continues to increase, development pressure on Southern Maine’s coast is renewed, the economy rebounds, and the grounds and structures in a deeded life estate adjacent to the Laudholm campus likely come under the Reserve’s control, the Laudholm Trust will be well positioned to capitalize on these trends, if we “think bigger.”

A note on “climate change”

The science is clear: rising CO2 in the atmosphere is affecting our state’s and the Gulf of Maine’s ecology, biology, and even geology – all fields that the Wells Reserve researches. As the lead government agency studying climate change, the National Oceanic and Atmospheric Administration (NOAA), and its outposts like the National Estuarine Research Reserves are charged with advancing our understanding of global climate disruption. It is imperative that NOAA’s Reserves and their state partners advance the scientific and public knowledge of the changing world. Climate change is the environmental issue of our time; as environmental organizations, we cannot shy away from addressing it.

“Thinking bigger,” but more importantly “acting bigger,” will require more community support, visibility, and funding. Therefore, it is the Laudholm Trust Board’s belief that **we must focus attention on three major Areas for Advancement over the next five years: Community Engagement, Communication, and Organizational Sustainability / Fundraising.**

By investing in and elevating operations within these Areas of Advancement, the Laudholm Trust will work on achieving the following goals:

- 1. To prepare for the operational challenges of the life estate buildings and perennially-threatened federal funding cuts;*
- 2. To offer a better and more profound visitor experience to more annual visitors, many of whom must ultimately become paying supporters;*
- 3. To reach broader audiences from Portland to Portsmouth, and eventually Boston, with a clear, concise, and compelling message and brand;*
- 4. To maximize the return from all available assets at the Wells Reserve at Laudholm: staff, volunteers, facilities, events, endowments, natural resources, and the surrounding communities;*
- 5. To ensure that the Reserve is part of the larger regional conversation on coastal development, nature, sustainability, and climate change in the Northeast;*
- 6. To make the Wells Reserve at Laudholm the recognized leader of the national estuarine research reserve system, in terms of public awareness, visitation, local revenues, Board and volunteer engagement, membership numbers, social media facility, and community interaction.*

This Strategic Plan discusses potential Areas of Advancement and objectives within them and will serve as a schematic for more detailed operational plans for Laudholm Trust’s 2015-2019 fiscal years.

In this Public Version of the Strategic Plan, specific details and recommendations for each objective under the three Areas of Advancement has been redacted, as some sensitive company information was included. While overall objectives are shared below, those wishing to see the full Strategic Plan and the operational details stemming from it are welcome to visit the Trust offices at 342 Laudholm Farm Road, Wells, Maine, during normal business hours and ask for the Trust president.

Performance Assessment

It is important to acknowledge that not all of the objectives described within this Strategic Plan will be initiated immediately. Many will not at first be possible, given available financial resources, staff capacity, and the need to establish baselines against which to judge progress. Therefore, objectives will, where sensible, be divided into short-term, mid-term, and long-range steps.

In addition, many of the objectives within the Areas of Advancement are interdependent. For example: fundraising will increase quickest if the Board develops as a supplemental fundraising arm to the Trust staff. These increased revenues will enable more staff and marketing capacity, which will increase visibility and draw more visitors and members to the Reserve, thus increasing other revenues. The Board hopes to see many of these “flywheel effects,” where continued successes will be built upon earlier, smaller advances within the Areas of Advancement.

Previous strategic plans of the Wells NERR and Laudholm Trust delivered well but were also deemed either too general (2000-2005, with few numerical milestones), or too specific (2009-2012, with few overarching strategies). We seek to align, in this 2015-2019 Strategic Plan, the language of a long-term strategy document with the detailed metrics of an annual operations plan.

If we are successful in achieving the objectives of this Strategic Plan, we expect to see measurable, quantifiable increases in visitor and member engagement and satisfaction, public awareness, and revenues. To assess our performance we will devise methods to track and annually monitor the following top-line indicators:

1. Number of visitors
2. Visitor satisfaction
3. Public awareness of the Reserve, its purpose, and its activities
4. Annual revenues and growth in the endowment principal
5. Number of members (a “member” is at least a \$25+ annual donor)
6. Number of volunteers (a “volunteer” donates at least 12 hours of time per year and is deemed a complimentary \$25 member upon meeting that threshold)

Areas of Advancement

Area of Advancement 1: Community Engagement

Visitor and Member Experience

The main challenge for improving this area is that it requires buy-in and work from WNERR staff; visitor services have typically been overseen by the Reserve director, education director, facilities manager and volunteer coordinator. While the Laudholm Trust communicates with its members and oversees the production of content for the general public, the experience visitors have at the Reserve rests primarily on the appearance of the site and their encounters with staff or volunteers.

Objectives

- 1. Positively engage all visitors**
- 2. Implement optimal fee structure**
- 3. Meaningfully engage youth and seniors**
- 4. Improve infrastructure for visitor experience**

Events

Events at the Wells Reserve at Laudholm can be either rentals (e.g., the American Diabetes Association's Tour de Cure bike-a-thon or the Wells Chamber's Antiques Fair) or Trust-organized festivals (e.g. the Crafts Festival and Punkinfiddle and Laudholm Live Barn concerts). In the case of the latter, significant staff time and volunteers are required to coordinate the festivals. At this time, because staff time has not been properly tracked, it is still unknown how truly profitable the major festivals are. Rental events, while less burdensome, may stray farther from the core research, education, and stewardship message. At present, the Reserve's Education department is also interested in February vacation (Winter Wildlife Day) and April vacation (Earth Day) celebrations. The opportunity exists to either augment these days or add a winter/spring event.

Objective

- 5. Increase community engagement via optimal events**

Other Strategies

Other strategies that support Community Engagement can be found under Objective 6 (re: branding and messaging), Objective 7 (re: science), Objective 11 (re: gift store), and Objective 12 (re: volunteerism).

Area of Advancement 2: Communication

Frustration or confusion with the name of the site has been common to every constituency (visitors, members, staff, volunteers, funders, the public). From the beginning of the Reserve, the dual operating organizations and competing brands (Wells Reserve vs. Laudholm Trust) have presented a burden to comprehension. While great strides have been made in the past decade on more consistent branding and overlapping messages, the public remains uncertain as to the operating structure and responsibilities of each organization. It is an open question as to whether the place and mission are being best served by two prominent names. The Trust, in the coming years, will redouble its efforts to consistently build up the reputation and brand of the “Wells Reserve.” The “Laudholm” name, while known locally, has less currency regionally and with younger generations; it may have outlived its usefulness. (The Laudholm Trust’s 501c3 status and local nonprofit establishment must remain, however, to secure matching funds to the federal support.)

Objectives

- 6. Establish consistent brand and messaging**
- 7. Keep “the science” in Laudholm Trust activities**
- 8. Improve internal communications**

Area of Advancement 3: Organizational Sustainability / Fundraising

The Laudholm Trust is in a better financial situation than it has been in since the downturn, and yet hurdles remain. Membership and annual fund revenues are half of what they should be, the endowment cannot support more than a tenth of the annual operating budget, grants remain merely a source of sporadic parochial income, and the life estate looms as a major operational challenge. Meanwhile, the founding generation of the Laudholm Trust who got on board in the 1980s when they were in their 50s and 60s are now nearing their 80s and 90s. Planned gifts must play a larger role in future budgeting, even while the next generation is introduced to this protected place. Therefore, when we turn our attention to organizational sustainability, we must look at how to maximize revenues based on all the assets, human and otherwise, we have access to.

Objectives

- 9. Significantly increase development activities**
- 10. Optimize and manage building occupancy**
- 11. Increase gift store revenues**
- 12. Increase volunteer capacity**

Board development

- 13. Increase Board effectiveness**
- 14. Improve performance assessment**

Conclusions

The 2013-2014 Strategic Planning process collected input and advice from the Board, the Reserve Management Authority, the staffs of both organizations, Laudholm Trust members, local leaders, and friends and neighbors. This plan is a distillation of their feedback; its strategies and objectives come from them. Going forward, the Laudholm Trust will best fulfill its mission by aligning with and supplementing the regularly updated five-year WNERR Management Plan. The ways in which the Trust undertakes that challenge are where creativity, flexibility, and energy are most important.

One thing is certain: continuing to build the “scaffolding around the structure” (the Laudholm Trust) is not the reason to improve the areas of Community Engagement, Communication, and Organizational Sustainability / Fundraising. It is the structure itself, the Wells Reserve at Laudholm, which deserves continued investment.

Epilogue: The Next Five Years

What might the Wells Reserve at Laudholm look like **10 years** from now, if the goals of this Strategic Plan are met and even exceeded?

- Could we double 2015's annual visitors?
- Would Reserve staff be routinely tapped by the local media as coastal experts and luminaries?
- Could we operate an expanded visitor center and/or fully-staffed entrance kiosk?
- Could 5,000+ school kids visit a new Education Center annually, especially if we offered dedicated complimentary transportation?
- Could we maintain an endowment that could, in an emergency, supplant the NOAA operating funding (at a 4% draw, that would require \$15M in just the General fund, six times what it is today)?
- Might we find rent-paying tenants for the life estate?
- Would people from Portland to Boston recognize the name “Wells Reserve”?
- Could the Reserve be an annual host of an outdoor concert by the Portland Symphony Orchestra?
- Could the WOCSD and York County Community College hold classes or even their graduations here?
- Could the Reserve be nationally featured as a premiere wedding destination?

Much is possible. The future will be what we make it.