

Geneva Lake Conservancy

Strategic Plan

Next Steps May 28, 2025

1. Mission Statement - Assign a small team to take these two statements and combine them into a one sentence “WHY”, or mission statement, that describes the purpose of Geneva Lake Conservancy and captures the essence of who GLC is and why it exists.
2. Shared Values
 - a. Assign a small team to define each of these shared values as they apply to GLC. In other words, what do these values mean in the context of the mission statement and what GLC does.
 - b. I would like to try and describe the values in 2-3 categories. Maybe we have sub points in each category.
 - c. We should survey stakeholders on the list of values. If an item does not survey at a high % it should not be on the list.
3. Vision Statement - “To be the leading Southeast Wisconsin land trust as measured by land protection, waterway preservation, and implementation of innovative programs that enhance the quality of life in the community.”
 - a. How does the board feel about the target geography.
 - b. Do we have a common understanding of what we mean by “waterway preservation”.
4. Present proposed final Mission, Shared Values, and Vision to full board.

Vision, Mission and Values for Geneva Lake Conservancy

GLC Board Meeting

June 21, 2025

REVISION OF
VISION
STATEMENT

CURRENT VISION STATEMENT

“To become the leading conservation organization in southeast Wisconsin with regional and national recognition for our land protection and climate change initiatives”

REVISION OF
VISION
STATEMENT

RECOMMENDED VISION STATEMENT

The Geneva Lake Conservancy is the respected land trust of Walworth County, dedicated to improving the quality of life in our communities through effective land protection, waterway preservation and innovative conservation programs.

REVISION OF MISSION STATEMENT

CURRENT MISSION STATEMENT

“To preserve and restore the lands and waters of Walworth County and beyond”

Two outcomes of Strategic Planning Session

“To educate, empower and inspire generations so that the quality of life in our community can be enriched.”

“To enhance the quality of life for communities and ecosystems through preservation and restoration of land and water.”

REVISION OF MISSION STATEMENT

RECOMMENDED MISSION STATEMENT

Our mission is to foster a deep appreciation of our natural environment, ignite action for its protection, and ensure it thrives for current and future generations.

The work of The Conservancy is founded on these values:

- **Trust** – We are dedicated to build trust in our conservation efforts by providing access to relevant scientific information, accurate data, clear messaging, effective use of our resources, setting achievable goals, and sharing our successes.
- **Respect** – We will build respect through diligent, committed, resourceful, and competent implementation of our mission.
- **Stewardship** – We are inspired by the responsibility to our planet, our neighbors, and future generations to nurture and protect our natural environment.
- **Collaboration** – We are motivated to work with and support our fellow conservation organizations and communities to strategically advance the protection of our environment.

SUGGESTED VALUES STATEMENT

A Review of Fellow Conservation Organizations

An aid to define our audience, donor pool and areas of distinction

Fellow Conservation Organizations

GLA

- Focus: Geneva Lake
- Service: Indirect (mostly funding)
- Formal relationships: EEF and GLEA
- Active relationships: EEF

GLEA

- Focus: Geneva Lake
- Service: Direct (testing, education, collaboration building)
- Formal relationships: GLA, All municipalities, EEF)
- Active relationships: All municipalities, EEF, GLC???)

Fellow Conservation Organizations

EEF

- Focus: Support of Lake Education
- Service: Indirect (Grants and Scholarships)
- Formal relationships: GLEA, GLA, all local schools)
- Active relationships: GLEA, GLA, all local schools)

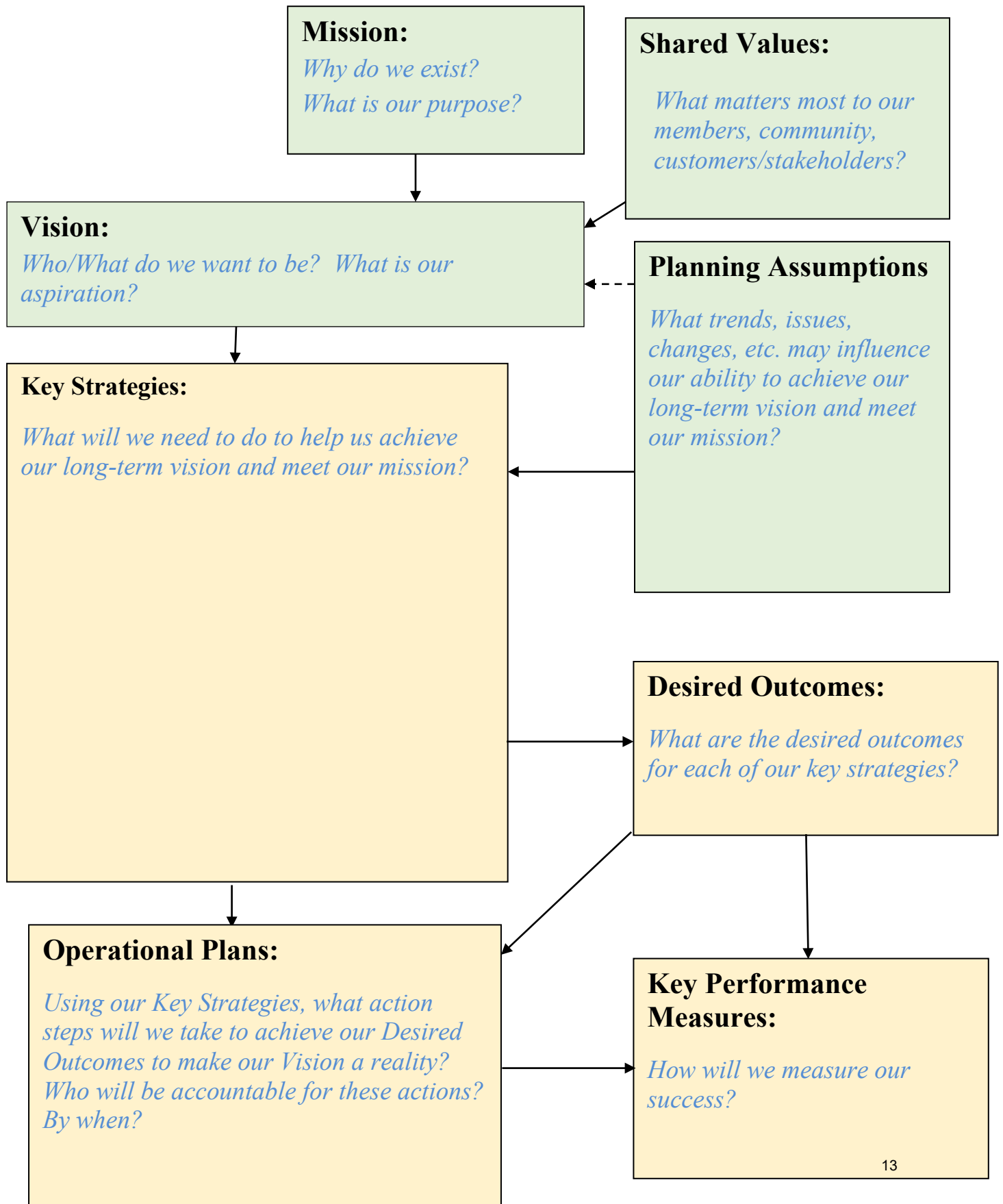
■ GLC

- Focus: ?
- Service: ?
- Formal relationships:?
- Active Relationships:?

Next Steps

- Set Key Strategies for 2026-2030
 - Survey entire board on key questions
 - Target geography
 - Agricultural community engagement
 - Advocacy and Water Alliance 2.0
 - Other
 - Set desired outcomes
- Approve plan
- Develop Operational Plans
- Decide on measurements
- Approve messaging

Strategic Plan Basic Framework



Mission Hanna Strategic Leadership Consulting

May 15, 2025

To: Karen Yancey

From: Tim Hanna

This is a summary of the strategic planning session with Geneva Lake Conservancy held on May 3 at Lake Lawn Resort in Delevan. I've attached a copy of the Strategic Plan Basic Framework for reference. This summary will go through the contents of each box in the framework along with suggested next steps to complete the framework and the strategic plan.

Foundational Elements

Mission:

Why do we exist?

What is our purpose?

Here is a summary of the process we used to determine the Mission, or the “Why”, for Geneva Lake Conservancy.

- Think of at least two or three stories of when you have felt most proud to work with Geneva Lake Conservancy.
- In each of your stories, what was the *specific* contribution Geneva Lake Conservancy made to the lives of others?
- What did the contributions of Geneva Lake Conservancy allow others to go on to *do* or to *be*?

Stories that were shared:

- Lake Ivanhoe
- Rohner Park
- Healthy Lakes
- Bromley Family Trust
- Holly Ball
- Keep It Blue/ Conservation at Home
- Shodeen
- High Trees
- The Preserve

Contributions made to the lives of others in these stories were:

- We educated them about the impact of land
- We provided access to all demographics
- We provided free training
- We educated people about nature
- We provided access to nature
- We facilitated the process of donating and preserving their property
- We created an opportunity for families to enjoy nature
- We provided access to a globally important landscape
- We provided closer proximity to nature
- We provided dignity
- We inspired others
- We motivated others
- We empowered others

Impacts of the contributions that allowed others to do or to be:

- Children have a deeper appreciation for and the values of nature
- Children learned how to fish
- People have less anxiety when enjoying green space
- Others are more physically and mentally healthy through cleaner air and water
- People are better informed about local history
- Allowed others to be in better control of their property
- Allowed others to pursue conservation in their education and to become a future conservationist
- People changed their behavior and became better caretakers of the Lake
- People became more cognizant and respectful of legacy
- People became better stewards of the land
- Allowed others to experience a better life

- Allowed others to have better quality of life
- Others have a fuller enjoyment of the breadth of nature
- Enabled others to protect their vision
- Allowed the community and families to make inter-generational connections through nature
- Allowed others to have greater awareness of environmental impacts
- Allowed people to see and experience the Kettle

Here's the grouping of verbs from the stories for the contribution side of the WHY statement.

- to PROVIDE, to CREATE
- to PRESERVE, to SAVE, to RESTORE, to PROTECT, to IMPROVE, to PERPETUATE
- to TEACH, to EDUCATE, to INFORM, to ENLIGHTEN
- to ENABLE, to EMPOWER, to FACILITATE, to ENGAGE
- to MOTIVATE, to INSPIRE, to ENRICH
- to ADVOCATE, DEFEND
- to DIGNIFY, to RECOGNIZE
- to ENJOY, EXPERIENCE, IMMERSE

The “WHY” (Mission) Statement

Using the “contributions” and the “impacts” two teams drafted “WHY” statements. The initial statements were to take the form of:

To (contribution) so that (impact).

Here are the two draft “WHY” statements the teams came up with:

Draft WHY Statements

“To educate, empower and inspire generations so that the quality of life in our community can be enriched.”

“To enhance the quality of life for communities and ecosystems through preservation and restoration of land and water.”

Next steps: Assign a small team to take these two statements and combine them into a one sentence “WHY”, or mission statement, that describes the purpose of Geneva Lake Conservancy and captures the essence of who GLC is and why it exists.

Shared Values:

What matters most to our members, community, customers/stakeholders?

Drawing from the stories and using the contributions of GLC in those stories, here is the list of Shared Values agreed upon:

- Trustful
- Competent
- Resourceful
- Respectful
- Integrity
- Stewardship
- Collaboration
- Inspirational
- Motivated
- Diligent
- Fun

Next steps: Assign a small team to define each of these shared values as they apply to GLC. In other words, what do these values mean in the context of the mission statement and what GLC does.

Planning Assumptions

What trends, issues, changes, etc. may influence our ability to achieve our long-term vision and meet our mission?

Using the STEEP (Societal, Technological, Economic, Environmental, Political) grid the team came up with the following trends and issues that should be kept in mind when crafting the strategic plan:

- Greater competition for resources (grants, donors, staff)
- Heightened political environment
- Decreased availability of potable water
- Fewer farms
- Generational preferences/changing demographics
- Climate change impact
- Emergence of artificial intelligence
- Pressure from development
- Opportunities of energy
- Green hushing
- Loss of biodiversity
- Decreased focus on the “greater good”

Vision:

Who/What do we want to be? What is our aspiration?

We imagined headlines in the news five years from now to think about the vision for GLC. Here are the headlines that were shared:

- Geneva Lake Conservancy has protected 10,000 acres!
- Entire Lake Geneva shoreline rehabilitation has been completed!
- Geneva Lake Conservancy named best conservancy in!
- Geneva Lake Conservancy recognized as most effective land trust!
- Geneva Lake Conservancy reaches endowment goal!

Using these headlines as inspiration here is the Vision Statement the team arrived at:

“To be the leading Southeast Wisconsin land trust as measured by land protection, waterway preservation, and implementation of innovative programs that enhance the quality of life in the community.”

Mission (WHY), Shared Values, Planning Assumptions, and Vision are the foundational elements of your strategic plan. You are very close to having these elements completed! Good job! These foundational elements will now provide the context for what you do, or the operational elements of the plan. As you develop the operational portion of your plan, you will want to make sure it is consistent with your Mission, Values, and Vision and takes into account your planning assumptions.

Operational Elements

To begin to think about the outcomes of your plan we did an exercise where we imagined ourselves in the future with GLC receiving a prestigious award.

“Imagine yourself in an auditorium in which someone is speaking and announcing an award. You realize that the person speaking is the CEO of the National Land Trust Alliance and she is here to recognize Geneva Lake Conservancy as the recipient of the National Land Trust Excellence Award! She says, ‘At no time in the history of these rankings has an organization been so unanimously agreed on as the most deserving of this recognition!’ There is a standing ovation as people get out of their chairs to applaud. When the applause dies down, she goes on to talk about the many accomplishments and factors that made Geneva Lake Conservancy deserving of this recognition. Listen to what she is saying? What factors were considered and what did Geneva Lake Conservancy accomplish?”

Here’s what others were saying about this achievement. These statements are to be used in determining what it will take to make them real!

Residents

- “GLC was easy to work with when I donated land.”
- “GLC empowered me to improve my own property.”
- “I am so impressed by GLC that I decided to put them in my estate!”
- “I’m glad to see so many ‘Keep It Blue’ signs.”
- “Thanks to GLC I can see how much cleaner the Lake is.”
- “I remember taking classes at Rohner which inspired me to be the environmental lawyer I am today.”
- “I wish there was a land trust as good as GLC where I have my second home.”
- “GLC helped my community protect heritage trees with a new tree ordinance.”

- “I’m glad the walking paths at KNC and the Preserve were preserved by GLC.”

Executive Director of GLC

- “We were more focused after our strategic plan.”
- “Our stakeholders appreciated our core values and bought into our vision.”
- “We became a land trust that lives up to its name.”
- “We had fun!”

Employees

- “GLC allowed me to advance my abilities and professionalism.”
- “GLC allowed me to implement a second fishing program at Lake Ivanhoe.”

Volunteers

- “GLC developed better outreach to its volunteers.”
- “GLC was more directed and provided training to enhance my ability to assist others.”

Key Strategies:

What will we need to do to help us achieve our long-term vision and meet our mission?

Remember, strategies are not goals and strategies are not plans. They are broad based statements about methods needed to be employed to support GLC's mission and Vision. Your current plan has four strategic initiatives that could easily serve as Key Strategies. Those initiatives are: Impact Land, Impact Community, Impact Water, and Strengthen the Team.

Next Steps: If you choose to use these as your Key Strategies you will want to give them definition in the context of your mission and vision.

Desired Outcomes:

What are the desired outcomes for each of our key strategies?

Next steps: After defining each Key Strategy you will need to decide what outcomes you wish to achieve under each strategy. Remember the difference between “outputs” and “outcomes”. Outputs are things like products, services, or revenues that can be tangibly quantified or counted. Outputs are things or activities done in pursuit of outcomes. Outputs are “WHAT” you do.

Outcomes on the other hand are the results achieved through one or more outputs. Outcomes create meanings or relationships and can differentiate GLC from other organizations doing the same “WHATS”. Therefore, outcomes are the “WHY”.

Operational Plans:

*Using our Key Strategies, what action steps will we take to achieve our Desired Outcomes to make our Vision a reality?
Who will be accountable for these actions?
By when?*

Next steps: After you have your Key Strategies defined and the desired outcomes identified for each strategy, you will need to list the activities and programs related to each strategy that will lead to the desired outcomes for that strategy.

**Key Performance
Measures:**

*How will we measure our
success?*

Next steps: Finally, you will need to decide how you are going to measure your progress toward achieving the outcomes you want to see. You will want to measure the outputs from your activities and programs as well as measure your progress towards the desired outcomes.

The process of defining strategies, identifying related outcomes and deciding how to measure progress towards those outcomes can sometimes feel overwhelming. That's because we are used to living in the realm of "WHAT" we do without much thought of "WHY" we do it. As stated earlier, outcomes are directly related to your "WHY". This is why we began this process by sharing stories about GLC. All of the stories that were shared were about outcomes achieved by GLC in the past because of "WHAT" you did. Because you have taken the time to determine your "WHY" you can now be more deliberate about "WHAT" you do and the outcomes you wish to achieve.

The following pages contain a sample of what your defined Key Strategies and related outcomes and measures may look like. The final step would be to identify the activities and programs needed to support those outcomes.

I'm committed to assisting you with these steps in finalizing your plan. We can communicate by email, phone, zoom, or in-person as needed. Let me know how I can help.

Key Strategy: Impact Land

Definition: Protect and steward critical landscapes to sustain ecological health and regional character.

Alignment with Mission/Vision:

Supports the mission by preserving land that enriches community life and ecosystems, and contributes to the vision by being a recognized leader in land protection.

Outcome	Measure
Conserve 2,000+ additional acres of high-priority natural or agricultural land by 2030.	Acres protected per year; cumulative progress toward 2,000-acre goal.
Develop and implement stewardship plans for 100% of protected lands within two years of acquisition.	% of new properties with completed stewardship plans within 24 months.
Increase public access by creating/enhancing 5 public nature preserves or trails by 2030.	Number of new or improved public access sites annually.
Monitor conservation easements annually, maintaining 100% compliance.	% of easements monitored annually; % of easements in compliance.

Key Strategy: Impact Water

Definition: Safeguard and restore the integrity of Southeast Wisconsin’s waterways and watersheds.

Alignment with Mission/Vision:

Directly fulfills the mission’s call to restore water resources and strengthens the vision of becoming a leader in waterway preservation.

Outcome	Measure
Restore 10+ miles of streambank or shoreline using natural infrastructure by 2030.	Miles restored per year; cumulative miles restored.
Protect or restore 500+ acres of wetland and floodplain habitat.	Acres restored/protected per year; cumulative total.
Partner with 10+ municipalities or landowners on watershed-based projects.	Number of formal partnerships established and maintained.

Outcome

Measure

Establish baseline water quality metrics and track % of sites with baseline data; % showing improvement over 5 years. over time (e.g., turbidity, phosphorus).

Key Strategy: Impact Community

Definition: Foster community engagement, education, and equitable access to nature.

Alignment with Mission/Vision:

Realizes the mission's commitment to educating and empowering generations and advances the vision of enhancing community quality of life.

Outcome

Measure

Reach 10,000+ individuals annually through programs and outreach.

Number of participants/year; demographic diversity of participants.

Launch 3+ new community partnerships annually, focusing on equity and inclusion.

Number of new partnerships; % aligned with equity goals.

Establish a Youth Conservation Leadership Program reaching 200+ students in 5 years.

Number of students enrolled annually; program satisfaction scores.

Conduct annual community satisfaction surveys.

Survey response rate; % reporting increased awareness or engagement.

Key Strategy: Strengthen the Team

Definition: Build a resilient, skilled, and collaborative organizational culture.

Alignment with Mission/Vision:

Enables the execution of mission-driven work and supports visionary leadership through a capable and committed team.

Outcome

Measure

Implement professional development plans for all staff, 100% annual participation.

% of staff with plans; % completing training hours per year.

Increase staff and board diversity by 2027.

% change in diversity representation year over year.

Outcome

Measure

Maintain at least 90% staff and volunteer retention.

Annual retention rate; exit interview insights.

Conduct biannual team climate assessments.

Survey completion rate; scores on collaboration, morale, and leadership indicators.