



A Strategic Plan for The Couchiching Conservancy Extended to 2027

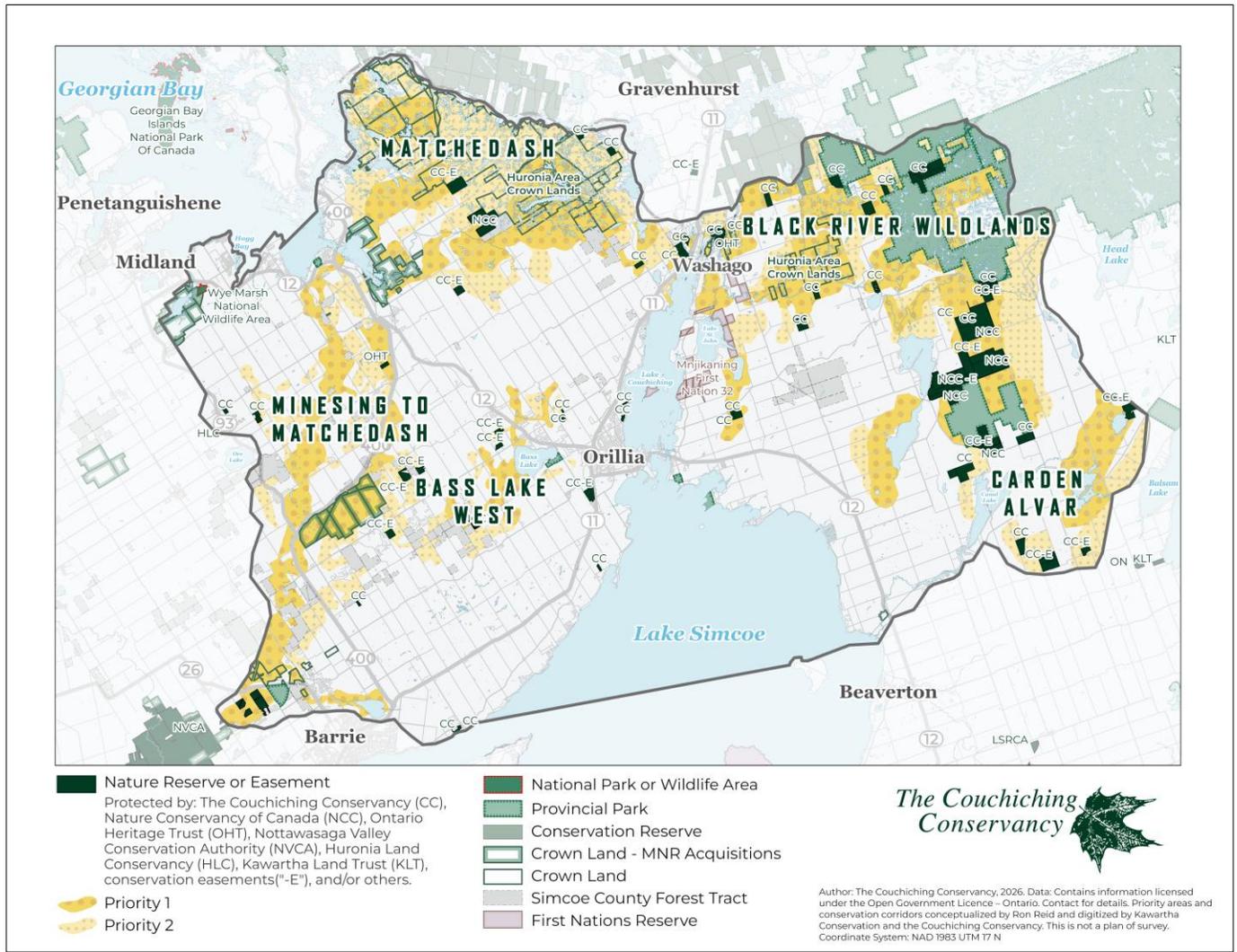
Declaration of Shared Principles

1. Credible science demonstrates that society's behaviour and actions need to change to avoid ecological, economic and social ruin on a scale unprecedented over the span of human history.
2. We believe in the power and value of local action to solve global problems.
3. We hold that every individual has a responsibility to shift away from behaviour that treats nature as a resource to be consumed toward behaviour that treats as sacred the healthy natural systems upon which we depend for our existence.
4. We foster a respect for all living things and acknowledge the right they have to exist without utility for humankind.
5. We seek a reciprocal, respectful and protective relationship with the land that provides us health and wellbeing. We recognize that we are of nature, not external to it.
6. We recognize that The Couchiching Conservancy operates within the territory of the Anishinaabeg, including the Williams Treaty and the Robinson-Huron Treaty. Understanding our connection to community, the land and the meaning of our historical agreements through treaty is an ongoing process to which we are committed.
7. We recognize that we are all accountable to future generations for our choices and actions. This moment demands we invest in nature to support all life on earth.

The Couchiching Conservancy Geographic Area of Interest

The geographic focus of The Couchiching Conservancy (the Conservancy) extends from Barrie in the west, over the top of Lake Simcoe and Lake Couchiching, continuing east to the City of Kawartha Lakes (Fig. 1). It includes the municipalities of Oro-Medonte, Orillia, Severn, Ramara and portions of Huronia, Barrie, Muskoka and Kawartha Lakes.

Figure 1: The Couchiching Conservancy Area of Interest



Mission

Protecting the special natural features of the Conservancy’s area of interest for future generations.

Mandate

- To preserve, protect, restore and improve the natural environment of the Conservancy’s area of interest.
- To encourage and foster an understanding and awareness of the natural environment and its value in enhancing our quality of life.
- To acquire, maintain and preserve lands, or interests in land of ecological, scientific, natural values.
- To promote and undertake research and data collection on the natural environment and

to distribute the findings to the public and to other organizations to advance the understanding of biodiversity, natural heritage and species conservation in Ontario.

Vision

We envision a mosaic of inter-connected wild spaces protected sufficiently to ensure the Conservancy's area of interest retains, nourishes and enhances its remaining natural riches through a changed relationship with the land in keeping with our shared principles. Our relationship with the land is built on respect, responsibility and reciprocity toward the earth.

By 2027, we envision the following:

- Spurred on by the climate emergency and biodiversity crisis, the Conservancy has accelerated the pace of acquisition and protection to the extent of its capacity using its current natural heritage strategy, "Conservation Priorities for The Couchiching Conservancy (2020)" as a guide. The capacity to steward protected properties will be balanced with the importance of bringing threatened land under ownership or other conservation instruments.
- Under the guidance of staff, the Conservancy is a conservation leader in the engagement of educated, empowered volunteers to steward the land under its protection. Recruiting, training and deploying volunteers to monitor and manage the land are key activities essential to achieve our stewardship goals and to engage the general public in our work.
- The Conservancy is financially sound and well supported by generous donors, strong governance, programming and initiatives to ensure long-term financial stability and independence. This strength is built on the highest standards of ethical behaviour and transparency as identified in the "Canadian Land Trust Standards and Practices 2019" and demonstrated by our Conservation Excellence Certification.
- Built on the foundation of a well-supported staff, the Conservancy is a people-focused, volunteer-based organization with a rich culture of inclusiveness and empowerment of its volunteers and supporters. It is governed with the assumption of goodwill, collegiality and respect that allows for expression of competing ideas and opinions without undermining the central goals of the organization. Volunteers are highly trained, accountable and supported by staff in the field, in the office, and in public. Supporters are engaged and growing in numbers through programs such as Community Science, Passport to Nature and other programs. All participants feel a sense of ownership and joint accomplishment.
- Collaboration with organizations, governments, Indigenous communities, educational institutions and other partners remains a key to our success. Such collaborations are tightly focused on the Conservancy goals and used to amplify the impact of our organization while avoiding duplicating efforts.

- The Conservancy supports positive changes in government policy where it aligns with our mission and mandate. The Conservancy will comment according to our Advocacy Policy alone or in concert with relevant partners.

The Couchiching Conservancy Goals Extended to 2027

1. Acquire and Protect Habitat
2. Steward the Land Under Protection
3. Build and Maintain Financial, Human Resources, and Operational Efficiency
4. Communicate, Collaborate and Celebrate

Goal Specifics

1. Acquire and Protect Habitat

- 1.1. Accelerate the pace of acquisition and protection guided by our current natural heritage strategy, “Conservation Priorities for The Couchiching Conservancy (2020).” By 2027, the Conservancy will continue to build organizational capacity to support a sustained increase in the annual rate of completed acquisition transactions, and shift a greater share of acquisitions toward priority habitats and corridor projects identified in the current natural heritage strategy,
- 1.2. The capacity to steward protected properties will be balanced with the importance of protecting threatened land.
- 1.3. Engage landowners in areas identified in our natural heritage strategy to encourage good stewardship and identify opportunities for land protection. Building ecological connectivity within each identified conservation corridor is vital as species shift their ranges to respond to shifting climatic conditions, and to reconnect fragmented landscapes.

2. Steward the Land Under Protection

- 2.1. Effectively monitor and adaptively manage all lands under the protection of the Conservancy. Ensure that each property has a management plan based on current science as well as a biological survey and stewardship activities that are appropriate to sustain or enhance the natural heritage features of the property. New properties will have a Property Management Plan within the first 12 months of acquisition. All Property Management Plans will be reviewed every five years to update activities and status. Ensure EcoGift compliance on EcoGift properties.
- 2.2. Maintain the highest standards for monitoring conservation easements, maintaining

records and nurturing strong relationships with landowners through a minimum of semi-annual contact.

- 2.3. Where access permits, all properties owned by the Conservancy will have active volunteer components of Community Science and other engagement programs to ensure effective monitoring and maintenance of properties with staff oversight in accordance with Property Management Plans.
- 2.4. Maintain an endowed stewardship fund sufficient to provide funding for maintenance of Conservancy properties. This will be based on a target of 15% of the value of the property at acquisition, judged on a case-by-case basis. This is to ensure preservation of ecological values, protection from liability and capacity to respond to contraventions of conservation easements.
- 2.5. Be prepared to use all available legal tools to protect the Conservancy’s lands or adjacent lands as the situation demands as per our Advocacy Policy. Maintain accessible stewardship funds to defend against property incursions and provide capacity to respond to contraventions of Conservation Easement Agreements.
- 2.6. Comment on municipal, provincial and federal policies and plans when relevant to our work using evidence-based language, prioritizing the protection of our protected lands and natural heritage values.
- 2.7. Create a climate change adaptation strategy to proactively address risks and vulnerabilities of the Conservancy’s protected lands and resources.

3. Build and Maintain Financial, Human Resources, and Operational Efficiency

- 3.1. Maintain an ethical, transparent and well-managed organization supported by highly trained and empowered staff, volunteers and informed supporters.
- 3.2. Engage the Board of Directors (the Board), Development Committee, Past Presidents’ Council, staff, and volunteers fully to accelerate the pace of fundraising to meet existing and future needs. We will focus on the resource engines listed in the Table 1, or their substitutes if program evolution is required.

Table 1. Resource Engines and Revenue Targets to 2027

Resource Engine	Revenue Target to 2027
Staff-driven projects, donations & grants	Meet or exceed the previous year
Board, Development Committee & Past Presidents Council Major Donor Development Initiative	Double the number of major donors and triple the threshold for major donations

Resource Engine	Revenue Target to 2027
Investment income	Follow our Investment Policy and endeavour to meet or exceed the stock market index
Heartwood Fund/Past Presidents Council (bequests and legacy giving)	Increase pledges to \$5 million
Events & Passport to Nature	Meet or exceed community engagement targets

- 3.3. Maintain a salary grid for all full-time staff that makes the Conservancy competitive with comparable organizations. Review the grid every two years using appropriate benchmarking tools and local labour conditions.
- 3.4. Achieving our conservation goals requires investing in people. The Board will support building staff capacity to fundraise, acquire new nature reserves, steward conserved lands and administer the organization by strategically adding positions where resources allow. This growth will be paced, intentional, and sustainable, ensuring that expanded capacity strengthens long-term financial health while enabling the Conservancy to respond to emerging conservation. Staff workloads will be appropriate to ensure optimal performance, job satisfaction, and staff retention.
- 3.5. The Board will continue to support benefits for full and part-time permanent staff through the Benefits Trust and Common Good Retirement initiative for non-profits, or another appropriate vehicle, ensuring any plan is sustainable for the organization over the long-term.
- 3.6. Continue to demonstrate fiscal responsibility and operational discipline to unlock new opportunities, enhance adaptability, re-invest into the organization’s mission, build long-term relationships with donors and ensure long-term sustainability aided by transparent reporting on administrative costs and key performance metrics that reassures supporters that their investment is being managed with integrity and care.
- 3.7. To ensure leadership continuity and organizational stability during both planned and unplanned leadership transitions, the Board will create a succession plan, which will be in place by the end of 2027. This will include a review of the Board and staff responsibilities to ensure clarity and alignment with succession planning and staffing changes as the organization evolves.
- 3.8. Ensure a sustainable, well-supported volunteer program that aligns volunteer jobs with the growth of new nature reserves and the Conservancy’s staff capacity to train and coordinate volunteers.
- 3.9. All of the Conservancy’s policies will remain current and reviewed on a 5-year cycle. Policies and bylaws will follow related legislation, in alignment with the “Canadian Land Trust Standards and Practices 2019”, and maintain our good standing with the

Conservation Excellence Certification program. The work of staff and volunteers will be supported by clear direction and guidelines.

- 3.10. Continue to develop unique opportunities to engage youth volunteers aged 18 to 30.
- 3.11. The Board will strive to ensure Board membership retains gender equity and also reflects the changing nature and diversity of the population in the Conservancy's geographic area.
- 3.12. The Investment Committee reviews the Investment Policy annually to ensure it matches our tolerance of risk.

4. Communicate, Collaborate and Celebrate!

- 4.1. Create opportunities to share and develop joint systems, tools, protocols and training with our partners that will respond to the climate emergency and contribute to the acquisition and protection of natural heritage in the Conservancy's region.
- 4.2. Identify opportunities for learning and working together using Two-eyed Seeing, incorporating western and Indigenous knowledge and awareness to accomplish common goals for caring for the land.
- 4.3. Build a culture among Board members, staff and supporters that is inclusive, respects alternative practices and honours Anishinaabeg presence on these lands.
- 4.4. Continue to maintain and update the Conservancy's website with particular attention to using industry best practices for layout and design, and making it "mobile-friendly" and responsive. The website is a source of up-to-date news and enables us to celebrate our collective successes.
- 4.5. Develop a marketing communications plan to support the organization's fundraising goals and overall mission. The plan will provide guidelines for identifying target audiences, key messages (positioning the organization) and strategies for achieving objectives.
- 4.6. In support of Canada's biodiversity target to conserve and protect 30% of terrestrial areas and inland water by 2030, staff or volunteers will continue to submit all the Conservancy lands that meet the "Canadian Protected and Conserved Area Database" criteria.
- 4.7. Celebrate successes at the Annual General Meeting, honour volunteers and staff at special events, such as the Gratitude gathering, and recognize special achievements and milestones.