

ALGOMA HIGHLANDS CONSERVANCY

STRATEGIC PLAN 2009-2011



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ALGOMA HIGHLANDS CONSERVANCY

EXECUTIVE SUMMARY

Under the leadership of our executive director, the Board of Directors of the Algoma Highlands Conservancy (AHC) embarked on the development of a strategic plan in the fall of 2008. The process involved a comprehensive review of historical documents specific to the development of the AHC, correspondence, meeting minutes and preliminary financial projections. The Executive Director conducted interviews with associates, technical advisors and founding members. Finally, Board members reviewed the vision, mission, strategic goals and objectives in a series of meetings in late 2008 and early 2009.

The new strategic plan outlines the four core values of the AHC, as well as its vision, mission and strategic goals. It also identifies specific objectives and milestones in the following target areas: Communication, education and research, silent sport recreation, conservation and protection, board development and governance, and financial management. This strategic plan will provide high-level guidance for the Board and staff for the period of 2009 to 2011. It will be supported by the development of annual work plans to reflect changing needs, priorities and opportunities.

Our review clearly demonstrated that the AHC remains a vibrant and successful organization with focused strategic directions and goals. To date, our influence extends to a land base of approximately 240 hectares (590 acres), including ownership of the Robertson Cliffs, an important nesting area for peregrine falcons, as well as a significant conservation easement on land adjacent to Stokely Creek Lodge. More recently, a three-way agreement with Astina Forest AG and Stokely Creek Lodge resulted in an exclusive 10-year license for the use and maintenance of the Stokely Creek trail system. Furthermore, the agreement included an option to purchase 1,050 hectares (2,600 acres) of land including and surrounding King Mountain. The successful completion of the King Mountain Legacy Lands Campaign will be pivotal in providing the AHC with a secure, continuous land base to achieve its conservation, silent sport recreation, education and research mandates. What's more, it would also guarantee the long-term protection of a unique, ecologically sensitive environment.

Already, the King Mountain Legacy Lands Campaign has drawn on the generous support of individual donors in the United States and Canada. Private donations total almost half of our \$1.5 million fundraising goal to date. We are currently enacting a comprehensive fundraising strategy and have established relations with a number of philanthropic foundations and agencies. We anticipate this will help us to fully realize our goal.

The AHC has also been successful on the operational front. With a new president, vice-president and several new Board members, we have demonstrable proficiency and credibility in all four of our core value



areas of conservation, silent sport recreation, environmental education and sustainable forestry. We also have considerable professional expertise in board governance and financial management. As a result, we have been successful in receiving support from the Ontario Trillium Foundation to provide operational funds and to hire an executive director and Legacy Lands Campaign manager. Additionally, a Community Development Corporation of Sault Ste. Marie and Area grant for marketing and public relations has allowed us to pursue and develop a number of new communications initiatives, including a new website and brochure.

Our review also identified a number of emerging opportunities, including the potential for similar land acquisitions in other areas of the Algoma Highlands region. While we will continue to focus on the King Mountain Legacy Lands Campaign through to its completion, we are looking forward to future partnerships and successes. We will continue to broaden our influence and impact throughout the region in all aspects of conservation, silent sport recreation, environmental education and sustainable forest management.

While recent accomplishments bode well for the AHC, we face significant immediate challenges. Principally, these involve raising the \$1.5 million required to purchase the King Mountain property by our deadline of October 2009. A second, longer-term issue involves meeting our strategic goal of solidifying funding sources for sustainable operations. While these challenges are not trivial, we are confident that the AHC executive, Board and staff, along with its strong partners and extensive bi-national community of support, have the collective expertise, passion and persistence to fully attain all of our goals in both the short and long term.

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ORIGINS OF THE ALGOMA HIGHLANDS CONSERVANCY

In 1992, conservationists, educators, silent sport enthusiasts and research scientists created the Algoma Highlands Conservancy (AHC) as a private, bi-national, non-profit land trust. Their objective was to conserve and enjoy the ecological and recreational attributes of the Algoma Highlands, a vast, semi-wilderness area just north of Sault Ste. Marie, Ontario. In 2001, the AHC established an office in Sault Ste. Marie, Ontario, where we remain today. Since its inception, the AHC has worked to promote biodiversity, conservation, scientific research, sustainable forest management, education and outdoor recreation.

Early AHC attention was focused on acquiring land owned by the late Chuck Peterson, the founder of Stokely Creek Nordic Ski Touring Centre, a cross-country ski area and lodge located in Goulais River, 30 kilometres north of Sault Ste. Marie. The AHC hoped to acquire the Stokely Creek property to fulfill its mandates on a single, well-managed land base. Chuck was a visionary landowner and a willing partner with the AHC. As the owner of Stokely Lodge, Chuck enjoyed sharing his property with thousands of cross-country ski enthusiasts each year. He collaborated with the AHC on several projects, including the purchase of the Robertson Cliffs property. Although several protection proposals, coalition structures and organizational models were proposed over the years in an effort to protect the entire 3,400-hectare (8,400-acre) Stokely property, Chuck unfortunately passed away before that dream could be fully realized.

The AHC worked diligently in the estate settlement process to broker a deal for the sale of the Stokely property that was consistent with Chuck's legacy. While Chuck's ultimate goal was to create a world-class area for cross-country skiing, he shared our vision of establishing a long-term land base to achieve conservation, environmental protection, silent sport recreation and sustainable forest management objectives. Thanks to the three-way agreement struck between Astina Forest AG, the Byker-Phair family (the new owners of Stokely Creek Lodge) and the AHC in late 2007, Chuck's legacy remains alive and well and is nearing its final realization.

A HISTORY OF INCREMENTAL SUCCESS

In 1996, the AHC made its initial step in land acquisition by purchasing a small parcel of land on the shores of Bone Lake. The site has significant historical importance to the many cross-country skiers who came to know and love local pioneer and personality Norm Bourgeois. What's more, this landholding is strategically important in that it regulates and restricts access to more remote sections of the Stokely Creek trail system, particularly by snowmobiles in the winter.

The AHC then acquired property at Robertson Cliffs in 2000. This beautiful 120-hectare (300-acre) parcel of land is recognized as critical nesting habitat for rare peregrine falcons. Under AHC ownership, it is protected from development and consumptive activity in perpetuity. In addition, the AHC holds a conservation easement that protects the natural values of an additional 120 hectares (300 acres) adjacent to Stokely Creek Lodge, and serves as an important buffer for silent sport enthusiasts.

These successes can largely be attributed to the long-standing dedication of Steve Holmes, one of the founding members and past president of the AHC. His hard work and sustained commitment to the goals of the AHC was a key factor in the initiation of the organization, and ultimately making key progress in achieving our mandate. Doug Pitt assumed the presidency in the spring of 2006, and has worked arduously and passionately towards fully realizing our goals. Doug's efforts began with a revitalization of the Board and extensive negotiations to secure Chuck Peterson's Legacy Lands. Together with new AHC vice-president Gaylen Byker, these efforts culminated in 2007 with a three-way agreement with Stokely Creek Lodge and Europe-based Astina Forest AG, a sustainable forest management company who owns the majority of the surrounding land.

This agreement contains three key elements. The first was the signing of a 10-year license agreement in which the AHC and Stokely Creek Lodge hold exclusive rights for use and maintenance of the entire 120-kilometre (75-mile) trail system for silent sport recreation. Under this license, the AHC, Stokely Creek Lodge and Astina Forest AG agreed to work together to minimize and discourage the use of motorized recreational vehicles, including the posting of signage to deter unauthorized access. The parties will also work together to minimize the impact of forest management activities on the ski operation through annual reviews of forest management plans and by curtailing all forest management activities during the critical winter period in core ski areas. With the mutual agreement of all three parties, this license may be renewed after the first 10-year period.

The second component of the agreement enabled the purchase of Stokely Creek Lodge by AHC Board member Gaylen Byker, his wife Susan, son-in-law Ian Phair, and daughter Tanya. Stokely Creek Lodge serves a critical access point to the trail system and a home base for silent sport enthusiasts.



It also provides infrastructure that may be used to facilitate and further conservation awareness and environmental education.

The third component of the agreement—and the focus of our current fundraising campaign—is a two-year option for the AHC to purchase the 1,050 hectares (2,600 acres) between Stokely Creek Lodge and Robertson Cliffs, including King Mountain. The purchase price is set at \$1.5 million. All donations and the majority of available AHC funds will be applied to this purchase through our ongoing King Mountain Legacy Lands Campaign.

The fact that Astina Forest AG made these lands exclusively available for AHC purchase reflects their interest in sustainable land management and their willingness to work in concert with our local conservation efforts. Similarly, the Byker-Phair family demonstrated their commitment to the initiative by generously offering to match all private donations to the King Mountain Legacy Lands Campaign. The establishment of this agreement and the ultimate realization of its three component goals will ensure the legacy of Chuck Peterson and the AHC core values of conservation, silent sport recreation, outdoor education and research are fulfilled.

Most recently the AHC has been successful in receiving grants from both the Ontario Trillium Foundation and Community Development Corporation of Sault Ste. Marie and Area, which have allowed us to hire an executive director, a Legacy Lands Campaign manager and to enhance our communications efforts. These important additions will help us achieve our current campaign goals and as well as our long-term continued success.

Throughout its journey, the AHC has received tremendous support from hundreds of like-minded individuals in Canada and the United States, which reflects our true bi-national stature and constitution. We maintain a contact list of more than 1,300 individuals. Many of these dedicated supporters have made generous financial and other contributions for which we are deeply grateful. Our numerous supporting groups and organizations include: The Nature Conservancy, The Wilderness Society, Land Trust Alliance, Ontario Trillium Foundation, the Community Development Corporation of Sault Ste. Marie and Area and Ontario Land Trust Alliance. Local schools, universities, volunteers and environmental groups have also partnered with us and utilize the trails and infrastructure on a regular basis for environmental education and silent sport recreation.

MISSION

The mission of the AHC is to conserve and protect the unique beauty and ecological integrity of key areas within the Algoma Highlands region. Through its core values and the work of passionate, dedicated volunteers, the AHC strives to protect the ecological function and habitat requirements of native plant and animal species in these areas, while encouraging human access and visitation through low-impact recreation and enhanced understanding.

AHC CORE VALUES

Conservation

The AHC seeks to conserve and protect the biodiversity and ecological integrity of the Algoma Highlands region while facilitating access to enhance awareness and appreciation of our natural heritage by the broader human community.

Environmental Education and Research

The AHC has always recognized the need to further our understanding of natural systems and to transfer this knowledge to current and future generations. The Algoma Highlands are a living classroom—a means of discovering and demonstrating the concepts of conservation biology, sustainable forest management and ecology.

Silent Sport Recreation

The magnificent terrain and unique beauty of the Algoma Highlands provide silent sport recreation, leisure and artistic opportunities in every season. The trail system meanders through mixed-wood forests, along tumbling creeks and climbs to the summit of King Mountain. It provides excellent opportunities for low-impact recreational pursuits like cross-country and backcountry skiing, snowshoeing, mountain biking, hiking, trail running, as well as more leisurely and artistic activities such as nature photography, painting and birdwatching.

Sustainable Forest Management

The AHC believes strongly in the concept of balancing environmental protection with the economic, recreational, and spiritual benefits humans can derive from forests. Sustainable Forest Management is the philosophy, science and art of maintaining or enhancing the long-term health of forest ecosystems while providing environmental, economic, and social opportunities for the benefit of present and future generations. Through a combination of protection and sound forest management, we strive to enhance the long-term health and value of the diverse forests of the area.

STRATEGIC DIRECTIONS

Through the immediate short term (2009-2011), the AHC will continue to follow its mission and promote its core values with a focus on three key areas:

- Implementing our agreement with Astina Forest AG and Stokely Creek Lodge
- Achieving the land acquisition goal of the King Mountain Legacy Lands Campaign
- Developing strategies to strengthen operational funding support and make the AHC sustainable over the long term

Our short-term strategic directions will significantly advance the AHC's broad goals of conserving the unique beauty and ecological integrity in key areas of the Algoma Highlands region by creating sanctuaries to protect ecological functions and habitat for native plant and animal species. While the central focus of AHC initiatives is on conservation and environmental protection, we encourage human access and visitation to these areas for low-impact recreational pursuits and the enhanced understanding and appreciation of the natural wonders of the Algoma Highlands area. In this regard, the area around King Mountain has recently been identified by the media outlet CNN as one of the best cross-country ski destinations in North America. This recognition is a testament to the value of working in direct partnership with Stokely Creek Lodge and Astina Forest AG to maintain an extensive trail system and lodge that are enjoyed by thousands of nordic and backcountry skiers and snowshoe enthusiasts each year. We will also continue to promote the area for birdwatching, wildlife photography and simply communing with nature. By encouraging visitors to enjoy the natural splendours of the Algoma Highlands first hand, we enhance awareness of the aesthetic, ecological and conservation values of the area across a broader spectrum of the human community.

Looking to the future, the AHC will seek to broaden its mission slightly and continue to promote and realize its four core values. Once the King Mountain Legacy Lands Campaign is completed and sustainable operational funding solidified, the AHC will focus on similar land acquisition potentials—some of which have already been identified. There is real potential to expand our partnerships and influence, and to further our goals relating to environmental education and the promotion of sustainable forest management within the region. In all of these endeavours, the AHC is committed to remaining principally focused on conservation and environmental protection within the Algoma Highlands.

STRATEGIC GOALS

In 2008, the AHC Board was organized to include a suite of subcommittees with specific goals and objectives that will effectively and efficiently address our core values and operational needs. Each subcommittee is managed by two or three Board members with relevant expertise and interest in that specific area, as determined by a skill matrix assessment exercise. The goals and short-term strategic objectives and milestones of each of these subcommittees are as follows:

COMMUNICATION

Goal

- To build positive, proactive relationships with all those involved in support of common goals

Objectives

- Promotion of issues relating to the environment and its protection through the hosting of conferences, seminars, public meetings, and information circulars
- Raise the profile of AHC with key constituents and stakeholders
- Continue to expand the capacity and enhance the use of the website as a core element of the communications strategy to provide information, solutions and a forum for sharing knowledge
- Create and maintain a comprehensive database of agencies, groups, institutions and organizations involved in conservation and protection

Milestones

- Attend mandate-specific workshops and conferences
- Develop relationships with local media organizations
- Network with conservation and community organizations
- Prepare and distribute newsletter and promotional material
- Maintain an active and informative website showcasing the AHC and its activities



EDUCATION AND RESEARCH

Goal

- To promote conservation, education and research to raise citizen awareness of the direct connection between human health and a healthy natural environment

Objectives

- Conduct or facilitate scientific research on the flora, fauna, hydrology and geology of the region; and disseminate research findings for the benefit of the general public
- Create educational resources with other conservation-minded groups and agencies
- Establish a web-based public education network to promote and support ecological sustainability
- Identify and publicize partner programs and projects
- Raise the level of public (particularly youth) awareness and concern about environmental issues
- Support field studies to document significant natural areas within the Algoma Highlands
- Identify opportunities in the region that contribute and support the goals of ecosystem protection and rehabilitation

Milestones

- Adapt or create issue-specific public information material
- Adapt or create stewardship educational resources
- Make contacts with schools and potential project partners in the region
- Support an information network through the website

STRATEGIC GOALS CONTINUED

SILENT-SPORT RECREATION

Goal

- To provide outstanding non-motorized wilderness recreation opportunities in the Algoma Highlands region

Objectives

- Participate in and facilitate the development of access and trail systems for silent-sport recreation (cross-country and backcountry skiing, mountain biking, snowshoeing, hiking, photography, etc) consistent with the environmental and aesthetic principles of the AHC

Milestones

- Monitor existing trail agreements and review expanded activities
- Maintain communication with Stokely Creek Lodge regarding skiing and snowshoeing trails
- Meet with local cycling clubs regarding the development of single-track mountain bike trails
- Meet with local and regional hiking clubs regarding the Voyageur Hiking Trail
- Risk management assessment
- Promote the area for photography workshops

CONSERVATION AND PROTECTION

Goal

- To lead and facilitate the conservation of biotic, abiotic and cultural resources on land owned or prospectively owned by the AHC

Objectives

- Acquire important parcels of land and protective easements in the Algoma Highlands region



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- Develop and implement a land acquisition program to support the conservation and preservation of endangered species or significant ecosystems in the Algoma region
 - Identify significant parcels of private lands, such as ecological corridors, scenic landscapes, areas of natural diversity, endangered species habitat and recreational and cultural interpretive sites
 - Foster community support for the ecotourism industry by acting in partnership with local tourism agencies

Milestones

- Conduct surveys, confirm and compile a comprehensive list of biotic, abiotic and cultural resources, with particular attention to rare or unique elements
- Obtain models of detailed conservation plans developed by other conservancies and use these as a basis for preparing our own conservation plans
- Discuss the potential value and possible location of interpretive signage along trails as a potential key mechanism for enhancing the awareness of conservation values
- Undertake actions to foster an awareness of conservation values and goals at the local level and for visitors to Stokely Creek Lodge
- Revisit the long-standing idea of establishing an intensive one-week field course focusing on field techniques and conservation (for area universities, colleges and secondary schools). This could be a source of income for Stokely Creek Lodge and/or the AHC, as well as a mechanism to complete annual surveys
- Consider possible restoration projects (such as the re-vegetation of landings and conifer planting) in Legacy Land areas
- Acquire important parcels of land and protective easements with a primary focus on the Algoma Highlands region of northern Ontario

STRATEGIC GOALS CONTINUED

BOARD DEVELOPMENT AND GOVERNANCE

Goal

- To continue to build the administrative and management infrastructure and capacity of the organization

Objectives

- Develop and implement governance policies and procedures to support the mandates and growth of the organization
- Continue financial management to provide for accountability and to ensure membership confidence

Milestones

- Conduct staff review and provide feedback
- Assess Board structure against skills matrix and add new Board members as required
- Identify long-range staffing requirements
- Approve Board policy and operations manual

FINANCIAL MANAGEMENT AND FUNDRAISING

Goal

- To obtain and manage funds to carry out AHC work in a fiscally responsible manner, while securing the financial stability and viability of the AHC

Objectives

- Enhance the capacity to efficiently document and manage membership/volunteer rosters
- Secure funding to meet the Legacy Lands Campaign goals
- Secure additional multi-year project funding
- Develop non-governmental sources of revenue



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- Maintain an active Finance Committee and Fund Development Committee
 - Continue a rigorous budgeting process to assure fiscal responsibility
 - Obtain grants to meet specific AHC project goals
 - Develop strategies and proposals to ensure financial stability and sustainability for the AHC through the diversification of its operational revenue sources

Milestones

- Prepare campaign strategy and annual fundraising plan to secure the \$1.5 million required to purchase the King Mountain Legacy Lands property
- Identify potential major donors
- Develop and implement an individual and corporate donor recognition program
- Research and apply for foundation and government funds

APPENDIX A – MONITORING & EVALUATING STRATEGIC PLAN ACTIONS

Achieving the milestones and meeting the strategic goals outlined in this document will ensure the AHC's continued success. This plan is ambitious and demands the sourcing of considerable funds for its short- and long-term implementation. It must also be acknowledged that the plan's ultimate fulfillment is dependent on a wide variety of factors.

It is the responsibility of the board executive and the executive director to monitor and evaluate the effectiveness of the strategic plan according to the following key questions:

1. Are goals and objectives being achieved? If they are, communicate the progress. If not, then consider the following:
 - a. Are the strategic goals still reflected in the implementation of objectives?
 - b. Will the objectives be achieved according to the specified plan?
 - c. Should milestone deadlines be reconsidered or changed? (Why are efforts behind schedule?)
 - d. Do personnel have adequate resources (money, equipment, facilities, training, etc.) to achieve their objectives?
 - e. Should priorities be revised in order to put more focus on achieving certain objectives?
 - f. Should the objectives be revised?
 - g. What has been learned from monitoring and evaluation that can be used to improve future planning activities?

Results of monitoring and evaluation should be in writing and will include:

1. Answers to the key questions for monitoring the implementation of the plan
2. Trends regarding the progress towards achieving objectives
3. Recommendations on the current status
4. Any actions required

Changes in strategic directions and goals will be the prerogative of the Board, as approved by the Board executive committee. Changes to the implementation of plans at the operational level will be the prerogative of management. When considering any changes to the plan, written answers to the following questions should be provided:

1. Why are changes being considered? (Root cause)
2. Why should the changes be made?
3. What specific changes should be made to strategic goals, objectives, responsibilities and timelines?

Amendments to the plan must be recorded and appended to the original plan document with dates.

APPENDIX B – COMMUNICATING THE PLAN

The Strategic Plan is a valuable document that reflects the understanding and commitment of Board Members to the mission of the organization. It is a document that will be made available to employees, members, partners, and potential funding organizations. This plan will be widely communicated through the following means:

1. Every Board Member and staff member will receive a copy of the plan
2. Distribute the plan (or highlights) to everyone in the organization. In doing so, all employees and volunteers will quickly be able to appreciate the organization's goals and objectives and understand how they relate to operations
3. Post the mission, vision and values statements in the office for public viewing
4. Publish portions of the plan in newsletters, brochures and on the website
5. Provide training for Board Members and employees in key portions of the plan during orientations
6. Include appropriate portions of the plan in policy and procedural publications, such as the employee manual and Board manual
7. Provide copies of the plan to major stakeholders, such as funding groups and agencies

