Forest EXPLORATION Center

Strategic Plan
February 2019

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Introduction

The Forest Exploration Center was established as a Public-Private Partnership between the Wisconsin Department of Natural Resources (DNR) and the Forest Exploration Center (FEC) in 2009. Its original purpose was to function as a steward of the forest land when the DNR took ownership of the parcel.

FEC serves the residents, schools, scientific community and forest industry of Wisconsin, and all visitors to the woodland, by caring for the forest through sound, science-driven, management of the land.

The Plan

This plan serves as a road map to move the Forest Exploration Center forward with its mission. While the goals will remain static over the next 3-5 years, or until the Board feels the goals have been achieved, the _individual action items and strategies under each goal are a fluid and progressively evolving piece of this strategic plan_. Those pieces are in the hands of the committees charged with overseeing the development and achievement of the goals.

Mission

To provide a unique woodland learning environment where meaningful opportunities in forestry education, recreation and stewardship are accessible to the broadest audience. To foster a deeper understanding of forest ecology and sustainable forestry management practices for current and future generations.

How FEC is living our current mission/purpose
➢ Progress is being made toward achieving the purpose of the forest.
➢ Trail project
➢ Interpretive signage ready to be deployed
  o Kiosks
  o Accessibility
  o Rules for facility/trail use
  o Forest management story
  o Future needs: online connection, Wi-Fi hot spots, accessibility to online resources
➢ Parking and roadwork are being worked on.

Vision

The three-year vision as established by the committee: Providing a forest (education, recreation, stewardship) experience close to home, and an opportunity to for people to relate that experience to their daily lives.

Commented [RG1]: Ray's suggested revision: "Provide opportunities, forest education, recreation and stewardship experiences that explore the nature and use of forests and the importance of forest stewardship."

Values
➢ The Forest/Woodland
➢ People
➢ Learning
➢ Collaboration

Reference Documents
- 2016 Visioning Document
- Current Initiatives and Commitments Document
- DNR Management Plan

Taking Stock

A SWOT analysis was conducted on-site during the retreat to determine the current environment in which the Forest Exploration Center exists. These items were used to create the defining statements in the next section.

Strengths
- Forest/Woodland/ADA trails system
- Diversity/energy/knowledge & expertise of the Board
- DNR/LEAF Partnership & funding
- Existing momentum of our current projects (making progress)
- Potential audience/proximity to Milwaukee metro
- Strong mission
- TOSA & Milwaukee Co & Wil-O-Way support

Weaknesses
- Funding/fundraising/fundraising skillset.
- Lack of visibility/marketing
- Lack of infrastructure/facilities
- Small in size (number of acres)
- Consensus on action/implementation
- Undefined niche – do need to figure out how we're different.
- Committed to certain activities (stormwater management, etc.) and the personnel to manage these commitments.

Opportunities
- Greater Milwaukee market – schools, other ways to connect
- Partnerships with other organizations – Both local and statewide
- Wealth of funding opportunities in the area
- Connect with UWM – faculty & student relationships
- Volunteers and interested involvement/supporters
- The call for environmental stewardship/sustainability – Green trends
- A good board, and the opportunity to include more people for community engagement.

Threats
- Misunderstanding in the community – marketing message around management
- Tension b/t preservation and conservation/ management both on the Board and in the community

- ➢ Ecological isolation of the forest
- ➢ Funding – Potential loss of future DNR funding and lack of funding diversity
- ➢ Invasive species/deer – impact on the forest woodland.
- ➢ Human impact on the woodland (vandalism, security, etc.)
- ➢ Potential support in the community?
- ➢ Get over the charter school issue – historic misunderstandings on our purpose.

Defining Statements

Using the strengths, weaknesses, opportunities and threats evident in the current operating environment of the Forest Exploration Center, the following statements were created to provide options for action to support the goals developed later in the planning process.

Strengths we can use to take advantage of Opportunities
- ➢ Using our woodland – physical space/ADA trails/LEAF programming to engage with the residents of the Milwaukee area. We have everything we need to bring people to the Forest.
- ➢ Leverage the BOD to reach out to schools and community partners.
- ➢ Everything we're currently doing internally, we can do with community partners
- ➢ Our mission and woodlands can be used to attract people in the Milwaukee area as volunteers/ stewards, including current property users and preservationists (we all want the same thing)
- ➢ Connect through like-minded groups through data-mining with local partners (mutually beneficial)

Strengths we can use to address Threats
- ➢ Creating a media plan to proactively present our vision/mission instead of waiting for misunderstanding to rear its head (using social media, etc.)
- ➢ Identify and create events to engage the community.
- ➢ Engaging those in the community with differing philosophies to become active in the mission.
- ➢ Using BOD to increase the diversity of funding opportunities.
- ➢ Using our partners' expertise to address the issues of ecological isolation and impacts on the land.

Opportunities we can use to address Weaknesses
- ➢ Using community partners to help spread messaging about what we're doing in the woodland.
- ➢ Using BOD diversity to find connections to fundraising opportunities
- ➢ UWM faculty and students to help with marketing on a pro-bono basis (marketing program)
- ➢ Using learning techniques to address the size of the woodland to see beyond the number of acres. (develop an App at UWM)
- ➢ Stormwater project will be a way to connect with the local community

Weakness that need to be addressed so we don't succumb to Threats
- ➢ Addressing our weakness in fundraising so any loss or lack of diversity of funding will not negatively affect us.

- ➢ Make sure that the groups who don't understand our mission don't exploit our lack of consensus on action.
- ➢ Engage a marketing individual/take advantage of marketing resources to help with misunderstandings in the community around our message and management.
- ➢ Using current marketing/communications techniques to engage the next generation with our message.
- ➢ Our lack of facilities needs to be addressed (utilities/sewer/etc.) so we can welcome groups for more than an hour or two.
- ➢ Using lack of facilities as a call to action to encourage funding opportunities in the community.

Establishing Goals

Five areas of focus were evident from the SWOT analysis and the corresponding Defining Statements:
1. Education
2. Marketing
3. Facilities
4. Fundraising
5. Partnerships

Using these areas of focus, the following goals were developed. They are in no specific order of importance or priority. All five should be considered on equal footing in terms of action needed to move the Forest Exploration Center forward in its mission and purpose.

Goal One - Education
- ➢ By the end of 2020, FEC will welcome groups of students to the forest for sustainable forest education

Goal Two - Marketing
- ➢ Develop a media/PR plan by the end of 2019 to raise the visibility of FEC

Goal Three - Facilities
- ➢ FEC will continue implementation of existing project commitments and determine future facilities to support and expand our programs

Goal Four - Fundraising
- ➢ FEC will secure additional funding streams to support existing programs and advance our mission

Goal Five - Partnerships
- ➢ Engage like-minded groups that will assist FEC with current and future goals

Working the Plan

The following strategies, action items and benchmarks were brainstormed during the retreat. These will serve as a _starting point_ for the committees tasked with overseeing each individual goal. The _individual action items and strategies under each goal are a fluid and progressively evolving piece of this strategic plan._

Goal One - Education
By the end of 2020, FEC will welcome groups of students to the forest for sustainable forest education

Purpose
- Develop/define FEC curriculum.
  - Education geared toward persons with disabilities.
  - STEM resources for both education and funding.
  - Address the six different categories of learners
    - Family and community groups - Guided Hikes
    - Schools
    - Persons with disabilities
    - Seniors
    - Teacher
    - Citizen Scientists and ecologists.
- Ensure FEC programming dovetails with what the students are learning in their classrooms.

Strategies & Action Items
- Establish a committee.
- Look into a "Friends" group and define a purpose if deemed appropriate.
- Develop/define FEC curriculum.
  - If using external curriculum making sure FEC has a staff member on-site to share the FEC mission
  - Facilities and programs will be accessible for individuals with disabilities and seniors
  - Create emotional ties to FEC programming
    - Can assist with PR campaign
    - Be always thinking about tying FEC programming to PR, marketing and fundraising.
- Begin welcoming groups to the Woodland
  - Upon completion of the trail, host a grand opening event and invite community members for a guided hike.
  - Welcome Wil-O-Way as our first group upon completion of trail (mid-end of 2019)
  - Establish community guided hikes on a regular schedule (schedule to be defined by committee)
  - Identify groups of experts, citizen scientists, ecologists and teachers (ie: wood products, butterflies, etc.) to invite or engage in FEC.
  - Work with volunteers
- Identify and reach out to school and youth groups FEC would like to have visit the woodland (including scout groups)
- Keep a list of people who visit the facility

Benchmarks

- By the end of 2019
    - Identify groups that FEC would like to see use the forest
    - Have 1 or 2 groups visit
    - Host a grand opening community hike
    - Create educational programming geared toward persons with disabilities (welcome Wil-O-Way as first official group)
- By early- to mid-2020
    - Get all identified groups out in the forest for at least one visit
    - Leverage media and fundraising to help with programming development
    - Engage STEM resources for both educational programming and funding.
    - Use the FEC website as a conduit to forest-related educational resources
- 2020 and Beyond
    - Continue to grow activity

Goal Two - Marketing
Develop a media/PR plan by the end of 2019 to raise the visibility of FEC

Purpose
- Raise awareness of FEC
- Define a blueprint for a marketing campaign
- Build membership support
- Reinvigorate marketing committee

Strategies & Action Items
- Establish a committee and add volunteers (5-8 individuals) with insight and experience to improve FEC's marketing efforts
    - Invite university support in terms of faculty/students to develop a marketing plan or development of an app.
    - Marketing committee members will support Julie and Ingrid on current marketing (social media).
- Owned media
    - Enhancing website and social media sites
    - Printing materials
    - Electronic newsletter
    - Speakers Bureau – have ambassadors to spread the story
    - Graphic support
- Earned media
    - Install a weather and/or wildlife camera in the forest
- Paid media
    - Raise funds to support programming

Benchmarks
- By the end of 2019
    - Establish a committee and define the purpose
    - Address FEC's Owned Media

- ➢ By the end of 2020
  - o Address Earned Media
- ➢ By the end of 2021
  - o Address Paid Media

Goal Three – Facilities
FEC will continue implementation of existing project commitments and determine future facilities to support and expand our programs

Purpose
- ➢ Manage current facilities projects, including stormwater and trail development/maintenance
- ➢ Work with existing partners (DNR, WDOT) on planned development
- ➢ Determine what additional needs FEC has in terms of infrastructure to support planned programming

Strategies & Action Items
- ➢ Create a committee
  - o Identify subcommittees: Trails, Facilities, etc.
- ➢ Trail Network
  - o Create a trail subcommittee to identify trails
  - o Identify volunteers for trail maintenance
  - o Identify new trails
  - o Close volunteer trails
  - o Develop rules of use and hours
  - o Purchase a trail counter
  - o Install a trail cam in areas of vandalism potential
  - o ADA Trail
    - ▪ Facilities map and trails
    - ▪ Contractor in place
    - ▪ Define easement by August 2019
- ➢ Stormwater installation
  - o In process
- ➢ Roadway
  - o In process with DOT
- ➢ Bathrooms
  - o Reach out to DOT about port-a-potty pad
  - o Implement port potty and relationship with Will-O-Way.
  - o Determine long term needs by 2022
- ➢ Building/Classrooms
  - o Determine interest
  - o Office support or programming displays
  - o Open air pavilion 2019
  - o Determine design costs and time frame
  - o Reach out to Will-O-Way for costs to use their facilities in the interim

- ➤ Utility building
  - o Determine storage facility
  - o POD or storage trailer

<u>Benchmarks</u>
- ➤ By the end of 2019
  - o Conclude trail construction, including ADA portion
  - o Arrange for a storage facility on-site
  - o Determine an initial plan for bathroom facilities
  - o Work with WDOT on roadway construction
- ➤ By the end of 2020
  - o Based on available funding, oversee stormwater installation
- ➤ By the end of 2021/2022
  - o Assess need for permanent facilities/buildings

Goal Four - Fundraising
FEC will secure additional funding streams to support existing programs and advance our mission

<u>Purpose:</u>
- ➤ Short term fundraising to ramp up operations and programming
- ➤ Capital Funding for long term operations - sustainability
- ➤ Continue to nurture relationship with DNR

<u>Strategies & Action Items</u>
- ➤ Create a committee
  - o Determine responsibilities for staff vs volunteers
  - o Recruit 1-2 Board members to work on fundraising
- ➤ Develop fee-based programming
- ➤ Develop sponsorship opportunities
  - o Create the structure for a capital funding campaign
  - o Explore interested foundations (ie: Greater Milwaukee Foundation, etc.)
  - o Pursue STEM resources for funding
  - o Explore corporate funding and identify corporate partners
  - o Investigate donor aggregators
- ➤ Develop a membership program
- ➤ Work with DNR to nurture relationship
- ➤ Work with Marketing committee to solidify fundraising message in all PR and social media
  - o Create a message and casebook to use in fundraising
  - o Refine messaging for long-term capital plan
  - o Include the money ask in all PR messaging
- ➤ Research long term sustainability
  - o Sustain ongoing costs
  - o Explore the need for paid staff for development

Benchmarks
- ➤ By the end of 2019
    - o Identify criteria for donors
    - o Develop list of potential corporate sponsors
    - o Develop a membership program
    - o Work with Marketing Committee on messaging
- ➤ By the end of 2020
    - o Fee based programming
- ➤ By the end of 2021
    - o Funding will be readily available to support the activities of the other committees
    - o Research long-term sustainability

Goal Five - Partnerships
Engage like-minded groups that will assist FEC with current and future goals

Purpose
- ➤ Cultivate allies in the community
- ➤ Engage both like-minded and non-like-minded groups to assist FEC

Strategies & Action Items
- ➤ Develop a committee, and coordinate with the other committees on items such as:
    - o Develop clear and consistent message
    - o Contact/engage outreach to groups
- ➤ Develop a formal document to identify how and who we are willing to be partners with.
- ➤ Engage both like-minded and non-like minded groups that can assist FEC
    - o Develop message
    - o Utilize, support and engage groups
- ➤ Partners will support FEC financially or in kind.
- ➤ Utilize support/join model to engage potential partners

Benchmarks
- ➤ By the end of 2019
    - o Identify 5-10 best potential partners and begin outreach
    - o Develop a formal document to identify how and who we are willing to be partners with.
- ➤ By the end of 2020
    - o Evaluate responses
    - o Identify a larger group of contacts to reach out to
- ➤ By the end of 2021
    - o Cultivate beneficial partnerships

Establishment of Committees

The following list of committee and responsibilities is the beginning of a larger conversation to be undertaken by the Board upon approval of the strategic plan.

Although beginning action items have been identified by the committee (see "Working the Plan" section), it will be up to the individual committees to determine how to address those action items and what further work can be done to support achievement of the goals as defined.

The initial work of each committee will be to take the goal that aligns with their committee, review the purpose, strategies & action items and benchmarks, and create a timeline to accomplish their goal by the end of 2021.

Committee chairs will report their progress to the Board President on a regular basis to make sure the vision of the FEC is being worked toward in a meaningful way.

Education/Interpretation/Outreach
Areas of focus:
➢ School/group engagement
➢ Program development

Community Engagement/PR
Areas of focus:
➢ Membership and Volunteer Development
➢ Media/PR

Facilities/Site Management
Areas of focus:
➢ Facilities
➢ Trail Implementation/Maintenance (potential subcommittee)
➢ Stormwater
➢ Forest Management: Objectives and Educational Goals

Fundraising/Budget
Areas of focus:
➢ Grant Awards Management
➢ Capital campaigns
➢ Membership program
➢ Budget development and management

Partnerships
Areas of focus:
➢ Volunteer development
➢ DNR partnership
➢ Cultivating allies in the community