

South Mountain Partnership

Strategic Action Plan for June 2018-December 2021

South Mountain Partnership's Vision and Mission

The South Mountain Partnership envisions a future of a landscape of conserved resources and vibrant communities sharing a common sense of place and collaborating on well-planned growth and sustainable economic development.

The Partnership's mission is to conserve landscape resources to enrich the quality of life and sense of place of the South Mountain region's citizens and communities.

The Partnership identifies three primary goals: Conservation of Landscape Resources, Promotion of Landscape Resources and Connections Across the Landscape.

Executive Summary

This strategic action plan for South Mountain Partnership (SMP) is the outcome from an intensive research process (Phase I and II) during Fall 2017, conversations during the SMP Leadership Committee retreat on December 15, 2017, and subsequent conversations with SMP leadership between January 1, 2018, and March 8, 2018. Fourteen Leadership Committee members submitted their ideas and recommendations for strategic goals and activities that would help the SMP improve upon its existing services, clarify the roles and responsibilities of leadership committee members, increase its communication efforts to its community and address challenges in the structure of the SMP and its relationships with the Pennsylvania Department of Conservation and Natural Resources and the Appalachian Trail Conservancy.

The Partnership is clear in its mission and vision (see above). Findings from the Phase I and II research process show that stakeholders and Leadership Committee members are generally satisfied with the services of the Partnership. At the same time, however, Leadership Committee members express feelings of "being stuck" and having had the same conversations over and over again on how to expand the work of the partnership "without getting anywhere."

This plan, therefore, aims to be both practical and tactical, providing a map for SMP leadership that will allow it to move forward on the many good ideas that have been generated, but not implemented, over the years including those contained in the 2016 South Mountain Regional Capacity Building Work Plan from the Chesapeake Bay Trust Capacity Building Initiative. It is not full of big, hairy, audacious goals (BHAGs). Instead, it contains concrete activities, which if enacted, will shore-up the underpinnings of the SMP, deepen engagement with partners and expand the SMP's visibility in the community.

The activities below are the result of a synthesis and distillation of recommendations from the Phase I and II report, input from the Leadership Committee by way of the Strategic Planning Worksheet exercise and Beam Consulting's conversations with South Mountain Partnership's Director, Katie Hess, Appalachian Trail Conservancy's Mid-Atlantic Region Director, Karen Lutz and the Department of Conservation and Natural Resource's Internal Lead, Mike Eschenmann.

Note: It is assumed that each year, the activities contained in the documents titled, "Workplan-At A Glance" and the document "2017 - 2020 South Mountain Partnership Work Plan – Deliverables," as well as the workplans from DCNR Funding Rounds 22, 23, and 24 which fulfill the DCNR funding requirements, will be implemented alongside this strategic action plan. The SMP will continue to provide its core services such as the mini-grants, partnership meetings, speakers series and other on-going activities or special projects that are already underway. Because it is assumed that the activities below are in addition to the SMP's on-going programmatic responsibilities contained in the documents mentioned above, those responsibilities are not listed herein. The activities below, however, once enacted should help expand the Partnership's core services and make them more impactful.

The ultimate goal of this plan is to help improve SMP's operations so that it can enact bigger, better conservation efforts throughout the region. **The first action item under each goal is the activity the Leadership Committee deemed most critical to moving the organization forward.**

Strategic Goal 1: (Leadership) Refine and clarify the roles and composition of the Leadership Committee so that all sectors are represented, and the expertise of the LC members is well utilized.		
ACTION ITEMS	MEASURES AND TIMING	LEADS
<p>1. Create a leadership committee job description that includes term limits that have the option to be adjusted or extended, if desired, and communicates the roles and responsibilities of members.</p> <ul style="list-style-type: none"> a. Maintain its advisory capacity (in other words – no governance responsibility or decision-making authority.) <ul style="list-style-type: none"> i. Providing advice, technical support in their areas of expertise and outreach on behalf of the partnership. ii. Participating in and helping to decide on the mini-grants award process. b. Invite current LC members to self-select when their existing “term” expires and whether or not they want to renew for another term. 	<ul style="list-style-type: none"> ● A job description is created, term limits are set, and each LC member has a clear understanding of their role and when their term expires by 12/31/2018. 	<ul style="list-style-type: none"> ● Cumberland Area Economic Development Corporation/Visitors Bureau. ● Partnership for Better Health.
<p>2. Conduct a gap analysis to make sure there is adequate representation on the LC evenly across all sectors.</p> <ul style="list-style-type: none"> a. Recruit new members to fill gaps b. Three-year priorities (see below) should inform recruitment. 	<ul style="list-style-type: none"> ● An analysis is conducted, and new members (if any) are recruited by 12/31/2018. 	<ul style="list-style-type: none"> ● Franklin County Planning Department.
<p>3. Shift LC meeting schedule to every other month (six meetings/year). The committees (See goal 2.2) would meet in the alternate months. Since, ideally, an LC member also serves on a committee, he/she only has to attend one meeting each month.</p>	<ul style="list-style-type: none"> ● Meeting schedule shift is made by 1/1/2019. 	<ul style="list-style-type: none"> ●

Strategic Goal 2: (<i>Engagement</i>) Refine and clarify the roles of various organizations that participate in the work of the partnership so that SMP can expand its capacity and deepen its engagement with partners.		
ACTION ITEMS	MEASURES AND TIMING	LEADS
<p>1. Create working and advisory committees around different sectors, topics, and priorities and ask partners to assign themselves to their preferred committee.</p> <p>a. These committees would have priority actions that correlate with the <i>2016 South Mountain Regional Capacity Building Work Plan from the Chesapeake Bay Capacity Building Initiative's</i> goals to:</p> <p>i. Provide strategic direction to the South Mountain Partnership.</p> <p>ii. Further economic health of the South Mountain Region.</p> <p>iii. Further public health to ensure wellbeing of individuals and the South Mountain landscape.</p> <p>iv. Further environmental health in the South Mountain region with a focus on water quality.</p> <p>b. Invite local foundations to participate in the committee structure so that they can be better informed of the work of the partnership, find synergy with SMP and help organizations raise money and manage their funding.</p> <p>c. A representative of each committee would sit on the Leadership Committee</p> <p>d. An intern could be hired to help manage this structure.</p>	<ul style="list-style-type: none"> ● First committees are formed and populated by 9/30/2018. ● An intern is hired for the calendar year 2019. 	<ul style="list-style-type: none"> ● Capital Resource Conservation & Development. ● USDA, NRCS. ● Partnership for Better Health. ● Land Conservancy of Adams County. ● Cumberland County Planning Department. ● Center for Land Use & Sustainability at Shippensburg University.
<p>2. Create “degrees of partnership” that reflect the level of engagement of the SMP participating organizations and then reach out to each current partner to confirm their desired level of engagement for the year. (This would need to be updated each year – but it also provides an opportunity to check in with each partner individually.)</p>	<ul style="list-style-type: none"> ● Degrees of partnership are created and implemented beginning 1/1/2019. 	<ul style="list-style-type: none"> ● NRCS, USDA. ● Partnership for Better Health. ● Cumberland County Planning Department.

<p>3. Explore resource sharing with appropriate partners and where partners are amenable, formalize the arrangement through MOU's. A few examples of potential resource sharing opportunities are:</p> <ul style="list-style-type: none">a. A partner organization takes the lead on producing the speaker series. SMP agrees to manage the promotion and registration activities for it.b. A partner organization has grant-writing expertise the SMP can use to apply for additional funding.c. A partner organization has GIS mapping capabilities that can help inform recommendations the SMP makes to municipalities.	<ul style="list-style-type: none">● Identify resources to be shared and with whom by Fall 2018. Complete MOU process by Spring 2019.	<ul style="list-style-type: none">● Capital Resource Conservation & Development.● State Historic Preservation Office, PHMC.
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Strategic Goal 3: (Program) Improve and expand upon SMP’s core services of networking, advocacy, education and granting to optimize these services and increase their value to participating organizations.		
ACTION ITEMS	MEASURES AND TIMING	LEADS
<p>1. Determine the priorities and focus for the next three years by answering the guiding question: <i>Where would the SMP most like to be most influential in the next three years?</i> This will be informed by the South Mountain Regional CBI Workplan and the working and advisory committee structure that will be implemented by 9/30/2018.</p> <p>a. Use these priorities to give focus to the various programmatic elements. For example, the topics of the speakers series should reflect the priorities. Mini-grants likewise would be aligned with the priorities.</p> <p>b. Identify “natural leaders,” (partners whose missions address the priority areas) and lean on their expertise by involving them in the planning for partnership events, as leads on letters of support and as counsel and lead agencies on critical issues.</p> <p>c. Explore the possibility of a circuit rider position, or something similar, on one or more of the identified priorities.</p>	<ul style="list-style-type: none"> ● Alignment of priorities and programs completed by 9/30/2018. ● Natural leaders found and conversations with them regarding their involvement begun by 10/1/2018. ● Decision made on the value of a circuit rider (or similar) position made by Spring 2020. Position in place by 6/2021, if determined to be of value. 	<ul style="list-style-type: none"> ● Center for Land Use and Sustainability, Shippensburg University. ● Adams County Planning Department. ● Franklin County Planning Department. ● Cumberland County Planning Department. ● Partnership for Better Health. ● Land Conservancy of Adams County.
<p>2. Articulate the “why statement” for your cores services of advocacy, networking, education, and grant-making. (Instructions and samples for creating a why statement found here. See also, <i>Simon Sinek’s book, Find Your Why.</i>)</p> <p>a. Use the why statement to identify and attract new audiences.</p> <p>b. Use the “why statement” to keep activity focused.</p>	<ul style="list-style-type: none"> ● Why statement is created. Desired new audiences are identified by 9/30/2019. 	<ul style="list-style-type: none"> ● Franklin County Planning Department. ● Partnership for Better Health.
<p>3. Develop a follow-up strategy for events that can be implemented by committees, volunteers or LC members so that new guests are identified, and current partners continue to be engaged.</p>	<ul style="list-style-type: none"> ● Event follow-up strategy is created by 8/31/2018. The strategy is implemented by 11/30/2018. 	<ul style="list-style-type: none"> ● NRCS, USDA. ● Partnership for Better Health.

<p>4. Create a more thorough criteria and evaluation process to identify nexus projects. <i>(Sample draft provided by Beam Consulting in Appendix A of this document)</i></p>	<ul style="list-style-type: none">• New project criteria are created and used to evaluate "Nexus Projects" by 1/1/2019.	<ul style="list-style-type: none">• State Historic Preservation Office, PHMC.• Adams County Planning Department.• Franklin County Planning Department.• Land Conservancy of Adams County.
<p>5. Develop an online tool that assists local governments (such as Esri's multiple applications and models for local and municipal government GIS cooperative systems) , and/or serves as a referral/advertising mechanism that will help interested parties find the help or expertise they need.–Think of it as an online directory, a 'yellow pages' for your area that focuses on conservation. (Sample mechanism found here.)</p> <ul style="list-style-type: none">a. Explore if partner agencies would be willing to participate in this for a small fee (e.g., \$100-\$200/yr)	<ul style="list-style-type: none">• The mechanism is developed and online by 12/31/2021.	<ul style="list-style-type: none">•

Strategic Goal 4: (Communication) Aggressively communicate about and promote the work of the partnership to increase visibility in the community, generate new relationships and expand the partnership's influence.		
ACTION ITEMS	MEASURES AND TIMING	LEADS
1. Affirm core audiences for each service area. <i>(Note: The Phase I and II report recommends that the SMP's core audiences be its partner organizations and other organizations, agencies and businesses in the community, NOT individuals or families. SMP's leadership committee needs to either affirm this recommendation or decide to go in a different direction. Potential new audiences could be municipalities and businesses.)</i>	<ul style="list-style-type: none"> Core audiences are affirmed by 9/30/2018. 	<ul style="list-style-type: none"> Franklin County Planning Department.
2. Determine what assistance is available from ATC's marketing/communication's team to implement the SMP's communications plan.	<ul style="list-style-type: none"> Assistance determined by 5/1/2018. 	<ul style="list-style-type: none">
3. Hire a succession of interns to help implement the SMP's communications plan and manage its social media presence. <ol style="list-style-type: none"> Generate monthly press releases. Secure speaking opportunities on Smart Talk and other regional media outlets. Use social media to promote SMP's involvement in the community and cross-promote partner agencies. Secure opportunities to include SMP content in partners' communication platforms. 	<ul style="list-style-type: none"> The first intern hired by 8/31/2018. 	<ul style="list-style-type: none">
4. Ask partners to invite one new person to each meeting.	<ul style="list-style-type: none"> Begin tracking guests at the next partnership meeting. Set a goal of 10 new guests each event. Process on-going. 	<ul style="list-style-type: none">
5. Make recognition of SMP in public announcements a stipulation of the mini-grant award to recipients.	<ul style="list-style-type: none"> Implement this requirement during the 2019 grant cycle. 	<ul style="list-style-type: none"> State Historic Preservation Office, PHMC.

Strategic Goal 5: (Influence) Develop relationships with Civic Leaders to learn about interests, priorities, and constraints so that SMP can provide informed recommendations to them.		
ACTION ITEMS	MEASURES AND TIMING	LEADS
<p>1. Generate a list of areas where SMP wishes to advocate for or influence, then draft letters of support on those issues for partners to co-sign.</p>	<ul style="list-style-type: none"> • Current list of areas to influence created by 12/31/2018. Template to be used to create letters of support created by 3/1/2019. Process on-going as issues arise. 	<ul style="list-style-type: none"> •
<p>2. Create formal MOU's with the four counties to ensure their buy-in to the partnership and secure their commitment to the work. <i>(Note: Former resolution language for the counties contained in Appendix B.)</i></p>	<ul style="list-style-type: none"> • Formal MOUs are in place by 6/1/2019. 	<ul style="list-style-type: none"> • State Historic Preservation Office, PHMC.
<p>3. Create a shareable, canned presentation on the partnership that can be given to various audiences, such as councils of government, community organizations, faith-based organizations, sportsman's clubs, etc.</p> <p>a. Determine which audiences are the highest priority and secure presentation opportunities with them first.</p>	<ul style="list-style-type: none"> • The presentation is created by 3/31/2019. • List of priority organizations to which to present is identified by 3/31/2019. • Presentations begin 6/1/2019 and are on-going at a rate of one or more a month. 	<ul style="list-style-type: none"> • Cumberland Area Economic Development Corporation/Visitors Bureau. • Partnership for Better Health.
<p>4. Develop opportunities or adapt and build on existing municipal government networks so that municipalities can come and share their priorities and "pain points" with SMP partners, receive information, recommendations, and support from the Partnership.</p> <p>a. For example, many municipalities struggle with generating enough education opportunities to meet their MS4 requirements. Some partners within the SMP could help them with this requirement.</p>	<ul style="list-style-type: none"> • The opportunities will be identified and initiated by 1/1/2020. 	<ul style="list-style-type: none"> • Cumberland Area Economic Development Corporation/Visitors Bureau. • Cumberland County Planning Department. • State Historic Preservation Office, PHMC. • Adams County Planning Department.

Strategic Goal 6: (Funding) Develop a financial structure that reflects the organizational and programmatic direction so that additional capacity can be gained and organizational sustainability is ensured.		
ACTION ITEMS	MEASURES AND TIMING	LEADS
<p>1. Improve budget and expense tracking process so that revenue and expenses are clear and easily accessible to SMP director, LC members, and partners for full transparency.</p> <p>a. Generate an annual report that includes financial statements shared with partners and posted on the website.</p>	<ul style="list-style-type: none"> Financial reports shared annually with partner organizations beginning in 2019. Financial reports shared quarterly with LC members starting in 2019. 	<ul style="list-style-type: none">
<p>2. Identify what revenue or expenses would be tied to MOUs with partners and counties on specific initiatives, services or activities, such as grant-writing support or the use of GIS technology. Meaning, it should be identified whether or not a partner would want to charge SMP to use their services. Or, if SMP is providing a service to one of the partners, then the SMP needs to decide whether or not there should be a fee attached to that service.</p>	<ul style="list-style-type: none"> Potential revenue and expenses identified by 1/31/2019. 	<ul style="list-style-type: none">
<p>3. Determine if SMP can use more of the ATC fundraising team's time to create sponsorship opportunities and apply for additional grant funding.</p>	<ul style="list-style-type: none"> Conversation completed by 8/1/2018. 	<ul style="list-style-type: none">
<p>4. Identify fee structure for online referral mechanism.</p>	<ul style="list-style-type: none"> Fee structure determined by 6/1/2021. 	<ul style="list-style-type: none">

APPENDIX A: SOUTH MOUNTAIN PARTNERSHIP
PROJECT EVALUATION FORM AND RACI QUESTIONNAIRE

PROJECT EVALUATION FORM

On a scale of 1 through 5, with 1 having the least alignment and 5 meaning the most alignment, please evaluate the following project:

Project Name:

Lead Organization:

Brief Summary of the Project:

Please rate the project for the following:

	1 least alignment	2	3	4	5 most alignment
Aligns with SMP values					
Aligns with SMP's mission					
Aligns with the CBI strategic plan					
Aligns with the SMP annual work plan					
Aligns with the current DCNR funding parameters					
Aligns with the SMP strategic plan					

To what degree does the project concern the following landscape resources:

	1 low degree of concern	2	3	4	5 high degree of concern
Natural					
Agricultural					
Recreational					
Cultural/Historical					

Please share any additional comments about the project in the space below.

RACI QUESTIONNAIRE

(Responsible, Accountable, Consulted and Informed)

The purpose of the following questions is to ensure transparency and clear communication for any project in which South Mountain Partnership is involved. These questions should be answered by the project lead at the time.

Please answer the following questions as completely and specifically as possible.

1. Who is responsible for the project?
2. Who are the partners on the project?
3. Other than South Mountain Partnership and the organizations directly involved in the project, are there others to whom you need to be accountable?
 - a. Yes or No?
 - b. If yes, please list the parties to whom you are accountable.
4. Who needs to be consulted on the project?
5. Who needs to be kept informed as this project moves forward?
 - a. Briefly state the steps you will take and channels you will use to keep parties informed.

APPENDIX B: SAMPLE COUNTY RESOLUTION

***WHEREAS,** South Mountain is a timeless treasure of natural, aesthetic, historic, cultural, community, agricultural and recreational resources where citizens, government, and partner organizations are working together to ensure that South Mountain as a whole, and the special places within, are understood, valued, protected, and enjoyed for generations to come; and*

***WHEREAS,** South Mountain is comprised of over 400,000 acres of land in south central Pennsylvania. Its viewscape is a unique combination of picturesque rolling hills, hardwood forests, productive agricultural lands, vernal pools and other natural springs and ecologically significant water ways; and*

***WHEREAS,** the counties of Adams, Cumberland and Franklin, are local units of government each containing portions of the South Mountain; and*

***WHEREAS,** the Commissioners of Adams, Cumberland and Franklin counties recognize the regional importance of preserving and promoting the assets of South Mountain; and*

***WHEREAS,** the Pennsylvania Departments of Agriculture, Community and Economic Development and Conservation and Natural Resources have championed the South Mountain Conservation Landscape Initiative for the purpose of developing and implementing a targeted plan for preserving and promoting the assets of South Mountain; and*

***NOW THEREFORE BE IT RESOLVED** that the County Commissioners of _____ County, Commonwealth of Pennsylvania hereby pledges to work cooperatively with the Counties of _____ and _____ and the Pennsylvania Departments of Agriculture, Community and Economic Development and Conservation and Natural Resources to develop and implement the goals, objectives and strategies of the South Mountain Conservation Landscape Initiative.*

Board of County Commissioners

,Chairman

,Vice-Chairman

,Secretary

ATTEST: _____

ADOPTED: DATE