

**Nonprofits build strong communities ...
We build strong nonprofits.**



Conemaugh Valley Conservancy

Strategic Directions

Bayer Center for Nonprofit Management at Robert Morris University

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Table of Contents

About the CVC	3
CVC Core Competencies	4
CVC Program Areas	5
Regional Master Plans	8
Aims of the Planning Process	10
Goal #1: PROJECTS	15
Select Highest Impact Projects and Demonstrate Value	15
Goal #2: PEOPLE	18
Engage Community and Recruit New Leaders	18
Goal #3: PROMOTION	24
Build Awareness of CVC	24
Goal #4: STRUCTURE	29
Reorganize CVC's Organizational Structure	29
Appendices	42
□ CVC Summary Brochure	43-47
□ Current Projects	48
□ New Pre-Project Evaluation Tool	49
□ Sample Post-Project Evaluation Tool (Sojourn)	50
□ Proposed Organizational Chart	51
□ Board Member Skills & Qualities Matrix	52
□ Analysis of 2015 Board Member Skills	53-76
□ Summary of Board and Staff Interviews	77-86
□ SWOT	87-94
□ Mission Worksheet	95-97
□ Environmental Scan	98-112

□ Organizational Assessment Tool Summary	113-120
□ Sample Committee Report to Board	121

About the CVC

The Conemaugh Valley Conservancy was formed to protect and restore the health and beauty of the Kiskiminetas-Conemaugh River Basin and to strengthen connections between the land and the people. Located in central Pennsylvania, the Conemaugh Valley boasts some of the state's highest mountain ridges and deepest river gorges, and features an impressive collection of natural, cultural and recreational resources. Historically, the Valley provided coal to a nation hungry for it. However the mining practices of the day paid little regard to environmental consequences, leaving the land scarred and the waterways polluted.

In 1994 a group of citizens convened the people of the Conemaugh Valley to form a nonprofit to address these issues and opportunities. The CVC envisioned a cleaned-up Basin, a healthy environment, one that would be a magnet for fishing, swimming and outdoor recreation, and one that would spur re-investment in the communities in and around the Basin. Notably, the organization was designed to be community-based, open to all.

The CVC agreed upon a mission, recruited members, elected a founding board of directors and began its work which continues today.

"Promoting the conservation and preservation of natural, cultural and historic resources and encouraging prudent land practices in the Kiski-Conemaugh by restoring and enhancing land and water based natural resources and promoting citizen and environmental stewardship through low impact recreation." - CVC Mission Statement

CVC Core Competencies

Community-Based

CVC believes that restoring the watershed is the responsibility of everyone. As a membership organization open to all, CVC offers opportunities for community engagement, education advocacy and stewardship.

Committed

CVC has a deep knowledge of community needs, resources and the Basin's landscape. It is fiscally responsible and well-connected.

Enterprising

CVC can rally resources including in-kind support to complete and maintain projects. The CVC "Does a lot with a little."

Multi-Disciplined

CVC believes that environmental integrity and economic stabilization, recreation, health and conservation are interconnected. A multi-pronged approach to the restoration of the basin is critical.

CVC Program Areas

Over the past 20 years the CVC has produced remarkable results with a skilled board at the helm, many energetic volunteers, and a small but committed staff. The CVC's program areas are:

Conserve and Protect Land, Rivers and Culture

Ensure Public Access to River Basin

Outreach and Education of Constituents

Conservation:

The CVC monitors the quality of the rivers, tributaries and buffer areas in 5 sub-basins covering more than 1800 square miles. Regular monitoring occurs using volunteers and manual methods as well as technology-based sampling techniques. These data are provided to state agencies for purposes of prioritizing clean-up projects and enforcement. The CVC engages in conservation planning, advocacy and remediation projects. The CVC also works to reinstate native vegetation and remove invasive vegetation such as knotweed to support conservation efforts. The CVC's conservation programs are known as the Stream Team and Natural Biodiversity.

The CVC employs a staff of four to implement these projects including one full-time project director, one part-time project director and 2 part time technicians.

While the organization has not focused on the conservation of cultural and historical resources in the basin, as the mission statement calls for, it could. Recently it has come to the board's attention that an historic canal lock, located on private property, is at-risk.

Access:

The CVC builds and maintains a land and water trail system that provides access for people to use and enjoy the Basin. This work includes planning and developing trails, connecting them to population centers and cultural amenities and maintaining them. Approximately twenty miles of trail have been developed thus far including the longest contiguous one, the West Penn Trail, at 18 miles. CVC assembles the parcels, holding deeds on some and easements on others, constructs the trail (often with in-kind donations of materials and heavy

equipment), and regularly maintains the trails through the all-volunteer West Penn Trail Council, a CVC task force.

CVC collaborates with [Allegheny Ridge Corporation](#), a nonprofit guiding the development of a state-designated [Heritage Area](#), that works with local partners to connect Pittsburgh-to-Harrisburg Main Line Canal Greenway. The Greenway, in turn, is part of an even larger effort, a 5-state, 32-county (more are being added regularly) collaboration, to “leverage our potential and compete as a region to increase our financial, political and intellectual power.” Known as the [Power of 32](#), one of the 15 key initiatives is to connect a regional trail system. ARC and CVC jointly select priority trail projects, which ARC staffs.

CVC also participates in the [Trans Allegheny Trail Alliance](#) to market the trail system by sending a CVC board member to meetings.

In 2004 CVC formed the [Stonycreek Quemahoning Initiative](#) (SQI) which developed a whitewater park with a dam release valve, and mountain bike trails. While SQI is now a separate nonprofit corporation, it is a *supporting organization* of CVC. As such SQI shares CVC’s charitable status as a 501(c)(3) organization, engages in a joint annual audit and works closely with the CVC on programs and projects. The CVC board approves the selection of the Directors that populate SQI’s Board, and there is some overlap with CVC’s board.

The CVC does not employ staff in the Access focus area, however Allegheny Ridge Corporation’s Greenway Coordinator works closely with CVC to implement trail projects that overlap with ARC’s Greenway Plan.

Outreach:

CVC was originally formed by community members and relied on volunteers and donations to do its work, a culture that continues today. CVC’s members are entitled to elect the Board of Directors each year at the Annual Meeting in May. The CVC creates opportunities for everyone, members and nonmembers alike, to get outdoors either as volunteers, such as trail maintenance or stream sampling, or as participants in events such as the quarterly member outings, the Sojourn and the Triathlon.

The River Sojourn, an annual event since 2000, attracts boaters, novice and experienced alike, who take to the water on a multi-day journey through all 5 counties in the Basin. The CVC’s newest event, the Triathlon, was designed to reach a younger demographic. The CVC can also be found in schools and at community events with educational programming around conservation issues.

A website (maintained by a volunteer), Facebook (maintained by the Conservation staff), newsletter and two Annual Reports are tools the CVC uses to promote community participation and awareness.

Staffing for many of the outreach efforts is provided through a contractual arrangement with Allegheny Ridge Corporation for 7 hours per week. (This contractual arrangement is in addition to the project support for access projects that fulfill the missions of both CVC and ARC.)

Regional Master Plans

All of CVC's projects should relate to two existing "Master Plans" that have been developed for the larger geographic region. The value of these plans should not be underestimated – they were generated with concrete data, guided by informed regional partners including the CVC, and included opportunities for community input. The planning documents demonstrate the interconnectedness of CVC's focus areas -- conservation, access, and outreach/education – and the impact of those on community quality of life within the Basin as well as the larger region.

These planning documents can also assure CVC's constituents, funders and government partners that local projects contribute to a regional revitalization strategy, and demonstrate that projects have been discussed and prioritized by the local community.

a. [The Kiski-Conemaugh River Conservation Plan](#) (RCP)

The RCP touches all of the CVC's Focus Areas – Conservation, Access and Outreach. It includes basin-wide activities as well as sub-basin specific activities covering

1. land resources
2. water resources
3. biological resources
4. recreational resources
5. historic/archeological resources
6. education/promotion
7. management

It was developed in collaboration with watershed groups, trail groups, government agencies and included community meetings and outreach. The plan articulates 8 goals and prioritized action items, each assigned to a participating organization. The RCP was one of the first in the state to be developed and, while old (1999), provides a wealth of data to guide the CVC.

CVC received a grant to update this plan and will do so in 2015. While the update may focus on water resources, and obtaining new data to compare to the 1999 baseline data, it provides a good opportunity to review all components of the plan, and check in with the community.

b. [The Regional Trail Network Plan](#)

This plan was originally a Power of 32 initiative to create a comprehensive regional trail network over 5 states and 32+ counties. As guided by the [Industrial Heartland Trails Coalition](#) (to which CVC sends a representative), The Regional Trail Network Plan analyzes trail gaps and provides a deep level of content concerning potential community and economic impact of trail development. CVC has the right and responsibility to participate fully, and add and amend data in the plan.

While not a plan per se, there is a third regional planning/advocacy effort that covers the area of the Conemaugh Valley bordered by Westmoreland County. [The Laurel Highlands Conservation Coalition](#) provides a forum for networking and discussion around conservation issues, advocacy on funding and policy issues, and to get the “conservation message” out to a broader audience and network. Penn Environmental Council facilitates the Coalition, and a CVC board member participates.

The availability of the two Master Plans does not preclude CVC taking on new projects or seizing new opportunities. They do, however, provide a bar from which to evaluate new projects, and carry a responsibility to check-in with partners and constituents so that precious resources are deployed thoughtfully.

Aims of the Planning Process

Over the past 20 years, CVC grew and developed a body of successful projects, a skilled board and a lean staff, and a corps of volunteers and community connections. As the CVC enters its third decade, it sought planning assistance to address specific concerns and engaged the Bayer Center for Nonprofit Management (BCNM) to help.

BCNM conducted research and interviews including the following:

- Environmental Scan
- Organizational Assessment Tool
- Key Staff and Board Member Interviews
- SWOT Analysis with Board
- Mission Analysis with Board
- Project Analysis with Board
- Organizational Structure Analysis with Board
- Board Skills and Interests Survey

BCNM initially convened CVC's Board to learn their expectations of the planning process, which were as follows:

- Financial Sustainability: CVC had enjoyed receiving operating support from a large foundation for many years. When that Foundation withdrew its support, CVC responded by substantially reduced its operating costs, and resolved to replace the foundation funding by mounting a campaign to attract and keep members, donors and business supporters. While all agree that community engagement will lead to the financial sustainability they seek, few board members feel equipped or able to do so.
- Growing Pains: As CVC's reputation for project completion and fiscal responsibility grew over the years, it became an organization that other organizations turned to for support. For example, it provided a bridge

loan to a watershed group, has served as the fiscal sponsor for several projects in the Basin, provides financial management services to SQI and adopted a water monitoring program, consistent with CVC's mission, from a sister nonprofit, Westsylvania Inc, that had dissolved. (Today it is a program of CVC known as the Stream Team.) Most recently, CVC voted to take on the programs of yet another nonprofit that had failed to achieve sustainability, Natural Biodiversity Inc (NB). While NB's purpose, to heal and support the biodiversity of landscapes, fits nicely into the CVC's mission, and although the programs are called for by the River Conservation Plan, the need for NB's specific programs are not well understood by the Board or by funders, and it has been difficult to weave NB into CVC's operations, particularly in the absence of an Executive Director overseeing operations as a whole. The addition of Natural Biodiversity to CVC also pointed to the issue that in the absence of an executive director, there is not a formal system of support and accountability for any of the CVC staff.

- Project Focus: The NB discussion raised the additional issue of adopting criteria for taking on a new project. While some board members appreciate CVC's ability to be opportunistic, others feel CVC should have more focus, and allocate precious resources for what must be done first, followed by what could be done.
- Need for New Leaders: The Board recognizes that it must begin to groom a new generation of CVC leaders, and diversify its skills and characteristics. However Board members also feel that the well of potential board members is shallow, and that combing the CVC's 1800 square miles for candidates is daunting. (Although the Board has managed to successfully represent the two ends of the watershed.) That the board is comfortable and has been working cohesively for years, in some cases decades, makes the prospect of changing the board's composition somewhat important, but not urgent.
- A Cohesive Public Face. The board has recognized that to attract new members and donors, potential board members and volunteers and partners it must put forward the CVC brand that conveys all that it does in a cohesive, consistent and appealing manner. As it is, the Stream Team has a separate logo, separate mission statement and issues its own annual report separate from the CVC's annual report. Natural Biodiversity continues to maintain a [separate website](#). Committees and task forces raising funds for events and activities often work at cross purposes with

different CVC representatives asking for support for different activities of the same person or business. The organization of the CVC website reinforces this notion of organizational “silos,” showing little relationship among projects or connections to larger issues.

Given this background, the Bayer Center recommends that the following issues be addressed first and foremost:

Piecemeal Projects: CVC’s accomplishments are impressive indeed, as was discovered in this process when all the organization’s projects, and their spread across sub-basins were compiled into one spreadsheet. However to someone unfamiliar with the Basin, the projects could be perceived as ad hoc, or one-off projects with unclear outcomes. There are few forums where these projects come together in a meaningful way, which has resulted in project “silos.” It is important for CVC to tie all of their projects together into a cohesive and comprehensive action plan, sharing assets and demonstrating collective impact. For example, critical mass could be achieved in a certain geographic area by relating trail, riparian buffer and stream actions. A certain specific pristine area could be chosen to protect and interpret. Volunteers could be invited to work across program areas. It is quite possible that this is a matter of packaging and presenting the organization’s work, and is not necessarily to suggest that the CVC is necessarily doing the wrong work.

Decentralized Operations: At one time CVC employed a “facilitator” that served as an Executive Director, directing the program planning, management and fundraising functions. Today, individual Board members assume responsibility for some projects, the Stream Team Project Director manages some conservation projects, the Natural Biodiversity Project Director others, the Sojourn Committee does its work and the West Penn Trail Council does its work. There are few forums where project managers come together in a deliberate way, reinforcing the concept of “silos” mentioned earlier. Further, the unpalatable (to many) administrative tasks — fundraising, financial management, human resources development, and others — are borne by just a few board and staff members, with many going undone.

Skinny Infrastructure: It is understood in 2015 that organizations (nonprofit or otherwise) that invest in their own infrastructure— skilled personnel, training, technology tools, fundraising and financial systems — are more likely to succeed than those that do not.¹ It is also known that raising unrestricted

¹ Read more about the [Overhead Myth](#) and the [Nonprofit Starvation Cycle](#).

operating dollars can be more difficult than raising project dollars, particularly when there is not an Executive Director or Development Director to do so. But adding new projects without adding administrative capacity is a recipe for failure. While the board is to be commended for its prudence, its ability to “do more with less” and for managing to keep the doors open during difficult times, the board must recognize that investing in the organization’s infrastructure will be a necessary part of addressing the organization’s issues that have been articulated. Yes, CVC can be lean, eliminate waste and move quickly. But not at the expense of overworking staff and volunteers, with insufficient back office support, or doing a project poorly or too slowly. A “culture of scarcity” should be avoided, where decisions are made by whether it requires hard-to-raise operating dollars. As it has been said, you can’t run an organization out of your car.² CVC must engage someone to administer all the parts of the organization, someone who also understands fundraising for operations.

Need for Ambassadors and Fundraisers: CVC board members wear a variety of hats to keep the organization running. 1) The Governance hat, which requires establishing strategic direction to fulfill the mission, maintaining connections with the community, ensuring that adequate financial resources are available and stewarding them, and monitoring the performance of the chief staff member. 2) Without an Executive Director, board members have donned Manager/Administrator hats, to manage projects and take care of financial, human resource, administrative functions. 3) Finally, many CVC Board Members are also Volunteers that build trails, sample the rivers and execute events. Complicating matters further, some CVC Directors are also Directors of SQL, a separately incorporated nonprofit. New Board members are needed who can dedicate more time to the governance function, and elevate the important role of board members as fundraisers and ambassadors. Current Board members should be reminded of the Governance role, and board meetings should be limited to governance functions.

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If there is one overarching focus for the CVC in the coming years, it is to increase collective impact through “One CVC.” It has been said by one board member that “Everyone plays and it comes out jazz,” and surely remarkable jazz has been heard. However with the Board’s expressed wish to change and grow the organization, it will be necessary to re-consider the players and the instruments and ensure that everyone is playing. Together. This is particularly

² Ibid

important as new people are brought into the organization — new members, new investors, new leaders.

This document is intended to align CVC's aspirations, to strengthen the organizational structure and to solidify the base from which CVC can begin to approach sustainability. As a CVC staff member put it, to strengthen the trunk of the tree so that the branches may better flourish.

Goal #1: PROJECTS

Select Highest Impact Projects and Demonstrate Value

Plan Projects Annually

CVC has an impressive portfolio of completed projects in its past with projects being chosen almost intuitively. Moving forward, the board should formally articulate a strategic approach by adopting an Annual Projects Plan that sets broad goals, perhaps to address a certain water basin, or a particularly pristine area, or the areas contiguous to a certain trail. The selected projects should tie to regional planning priorities and the Master Planning Documents. This has the potential to transform a collection of ad hoc projects into a strategy that has relevance for the entire region. This kind of planning does not preclude the board from seizing unique opportunities, it merely requires that new projects be evaluated carefully before undertaking them. The Annual Projects Plan could be discussed and adopted at an annual Board Retreat and should be closely tied to the annual budgeting process.

To be included on the Annual Projects Plan, projects should be evaluated in the Program Committee using agreed-upon criteria as shown in the [CVC New Project Evaluation Tool](#). The Program Committee can recommend projects to the full Board (or not) following careful study of the need or opportunity that the project will address and the organization's capacity to implement it.

As part of that process, each project's relationships to the [The Kiski-Conemaugh River Conservation Plan](#) (RCP) and/or [The Regional Trail Network Plan](#) should be articulated. Projects should also be evaluated for penetration within the sub-watersheds to enhance both fundraising prospects and community relations.

Projects included in the Annual Projects Plan should have a corresponding budget, produced by staff where there is staff, or the Program Committee, or the task forces that will be overseeing implementation of the project. The Finance Committee will fold project budgets into the annual organizational budget that is ultimately approved by the board.

The Board ultimately approves the Annual Projects Plan and the Annual Budget.

Define Success Up Front and Monitor Projects

Once projects are voted for inclusion in the Annual Projects Plan, a work plan should be developed and milestones and metrics established, by staff if staff are assigned, or by the volunteers that are implementing the project, or by the Program Committee — whomever is most equipped to do it.

Metrics are often required by funders, but are useful in reporting to all CVC donors, and of course are useful in determining whether the project accomplished what it set out to. The milestones will determine whether projects are on schedule. Progress toward metrics and milestones can be reported at Board Meetings, and will enable board members to ask questions.

The CVC Annual Report is an ideal vehicle to convey measurable results and should answer the question “What difference has CVC made?”

Share the Plan Widely

CVC should always give members and the wider community opportunities to comment on the Projects Plan, and to tell the CVC what they think is important. An obvious opportunity is the Annual Meeting each May. A revamped website will also be a good place to inform community about plans and projects and progress.

The update of the River Conservation Plan (RCP) being undertaken by CVC in 2015 provides an excellent opportunity to review RCP projects and, because community meetings are a required part of the RCP update, to begin to get reacquainted with constituents and the needs and opportunities that they perceive. These meetings will also be an introduction of the CVC to a new pool of members and volunteers, a pool that cares enough about the Kiski-Conemaugh Valley to come out to a meeting. Engaging an excellent meeting facilitator and working hard to promote the meetings will provide an opportunity for CVC to put its best foot forward.

As described by CVC’s Project Director for Stream Team who is staffing the RCP Update: “We are obligated to host several public meetings to get input from communities to hear what they’re happy or concerned about. The document will address new areas of concern, like shale gas extraction.”

CVC should also regularly check in with its many partners and collaborators such as watershed and trail groups, Allegheny Ridge Corporation, the Western PA Conservancy, the Trans Allegheny Trail Alliance and others who have

overlapping missions and interests. An Annual Projects Plan is an excellent tool with which to have those conversations.

Goal #3, Promotion, recommends that CVC empower Ambassadors, board members and staff alike, to go out and talk with small groups, large groups and individuals about the work CVC is engaged in, in all the focus areas, Conservation, Access and Outreach. Checking in with community will not only raise awareness of the CVC, but will also open doors to new members, partners and donors.

Goal #2: PEOPLE

Engage Community and Recruit New Leaders

It is clear from the Bayer Center for Nonprofit Management's work with the [Community Foundation for the Alleghenies](#) that the people of the Conemaugh Valley place high value on the region's natural resources, scenic beauty and opportunities for outdoor recreation. As a citizen-based, membership organization charged with preserving and protecting the environment, the CVC has the right and responsibility to convene community for discussion and action, and to seek their support. When approached with a clear and consistent message, the community will have an opportunity to act upon their values. And as the community participates, CVC will increase their legitimacy and authority to implement programs and will grow the confidence of investors, partners and government agencies.

The CVC can think of their community as a pyramid comprised of a variety of levels of participation. At the bottom with the least amount of engagement with the organization is the community-at-large. At the top are the officers of the board who are highly engaged. In between are members, volunteers, donors, and board members. Goal #2 is intended to move everyone up to a greater level of participation in the organization. And, to offer those hardworking souls at the very top of the pyramid an opportunity to move to a different level of participation.

Refresh Board:

CVC is fortunate to have a committed Board that works diligently on behalf of the organization. Beyond their primary responsibility to govern the corporation, many board members take on managerial tasks that might be performed by professional staff in other organizations, and they are also often volunteers who build trails, sample streams or lead outdoor activities. Directors' community connections are extensive, with ties to regional environmental, cultural and community development organizations. Each board member brings experience and skills to the organization, covering governance, nonprofit management and project management.

The CVC Board wishes to ensure CVC's sustainability by identifying, recruiting and engaging a new generation of board members. They wish to diversify the board by adding people who live in different parts of the Conemaugh River Basin, who have a variety of demographic characteristics and who can bring a new perspective to the table. This effort will broaden the board's expertise,

leverage new resources and lighten the load for overworked board members. The job of identifying board candidates and officers will be within the purview of the Board Development Committee (currently called the Nominating Committee in the CVC Bylaws), who should be on the prowl year round for prospects to nominate for election.

A tool to ensure that the board is well-rounded and to identify gaps is a **Board Composition Matrix**. An **Analysis of Current Board Members** is included in the appendices. Skill sets that the CVC Board could use immediately include Personnel Management, Marketing, and Fundraising. Qualities needed include an ability and willingness to be an ambassador for the organization. Local bank employees can often be counted upon to provide board service and could become a Treasurer-in-Training; local universities are a good source of people interested in making a difference in their community by serving on a board.

An excellent way for a board to ensure that they stay fresh with new ideas, new energy and new faces, is to include a bylaw that requires term limits. CVC has a reasonable term length of three years. What's needed is a limit on how many terms a board member may serve. Once a board member reaches the end of their second term (as many as six years of service total). While the Board has expressed reluctance to lose stellar board members, CVC could permit the director's re-election after a one-year absence. In the "gap year" the former director may be invited to continue to serve the CVC by participating on a committee, a special project or a task force. In addition to the benefit of keeping the group fresh, term limits will help to alleviate the perception that the board is exclusive, or clique-ish. "We are inside baseball," said one board member.

Just as staff members need accountability, so too do board members. The Secretary or Board Development Committee should keep, or cause to be kept through a staff member, each board member's attendance, committee service, membership recruitment, sponsor recruitment, contributions and training needs. The Board, via the Board Development Committee, should agree upon what the expectations are for a Board Member, including fundraising expectations, and adopt a policy to that effect. (The Board Development should confer with the Marketing/Fund Development Committee on fundraising expectations.) This will have the added benefit of being able to tell a prospective board member just what the job entails.

Board members should be offered training opportunities. In the course of this work with the Bayer Center, one board member expressed interested in learning

about board responsibilities, and others are interested in learning how to understand the financial statements.

Prepare New Officers

CVC's Bylaws call for a President, two Vice Presidents, a Secretary and an Assistant Secretary, a Treasurer and an Assistant Treasurer. The "Vices" and the "Assistants" should fully understand the top role and actively be in training to take over the top position. This can help create a truly healthy and sustainable board, where there are a variety of individuals who are well-equipped and confident to step into officer positions, whether in an emergency, or to wean the organization from being person-dependent.

Recruit Non-Board Members to Committees:

The **recommended new CVC committees** should adopt purpose statements, and name members, meeting times and a chair. This formalization will permit the board to reach out to community and business people, members and volunteers, and invite their participation in the CVC's work by serving on a clearly-defined committee with a clearly-defined purpose. In addition, the Program Committee will have task forces that implement specific projects, such as the Seward Boat Launch Task Force. Similarly, the Marketing/Fund Development Committee will oversee the Triathlon Subcommittee, the Sojourn Subcommittee and other fundraising events. Committees, sub-committees and task forces are an excellent way for new people to become familiar with the work of the organization, without (yet) committing to full board service and also allow the Board to "test-drive" potential new board members.

Unify Volunteer Program

The CVC offers a variety of ways for volunteers to serve the River Basin and the organization. The Stream Team has been particularly good at identifying volunteer opportunities, as has the West Penn Trail Council that puts volunteers to work maintaining 18-miles of trail. The Natural Biodiversity program has intentions to put volunteers to work. Both the Sojourn and the Triathlon require volunteers to both plan and execute the events. The current webmaster is a volunteer, and there are volunteer opportunities that can be created — for example there is currently a need for additional Facebook Administrators and website designers.

Just as an organization should have only one fundraising plan, there should also be a single volunteer-raising plan that compiles all the volunteer

opportunities the CVC has to offer and thanks volunteers in a unified manner. Whether stream sampling, trail maintenance, Triathlon helpers, or Facebook administrators, all the volunteer opportunities should be promoted together, with a clear understanding of what the volunteer job entails, and how the volunteer will be overseen. This will allow volunteers to move across projects and departments and give them an opportunity to experience the full scope of CVC's work.

Volunteers will have in common an interest in the CVC cause, but motivation for volunteering will be different for each — social interaction, resume building, project interest are just some motivations. Being aware of all the options for volunteer engagement will serve both the volunteer and the CVC well.

Finally, the importance of celebrating volunteers, the heart and soul of CVC, cannot be overstated. Nor can the observation found in **CVC's Environmental Scan** that those who volunteer give twice the percentage of income to charity as those who do not. Give them a good volunteer experience, a variety of opportunities and thank them, thank them, thank them.

As with donations, volunteer participation should be carefully tracked and communicated, especially to the board. Ideally results are compared each period, with data such as # volunteers, # unique volunteers, # new volunteers, # volunteer hours.

Recruit New, Retain Existing Members

“Customer retention is the unsung hero of the successful business. Its flashier sister, customer acquisition, usually steals the spotlight, but retention is what ultimately builds the foundation of a company that is positioned for growth. After all, it's much easier to fill a bucket than a sieve.”³

CVC has developed a Fund Development Plan which includes a member recruitment plan and that work should continue, with a high degree of focus in retaining members from year-to-year. While some members may renew simply because they received a reminder in the mail, others will need a phone call from a Board Member aka a CVC Ambassador. The Bookkeeper, who keeps the membership roster and sends renewals by mail could keep the Marketing and Fund Development Committee apprised of membership lapses.

³ <http://tech.pro/blog/1506/why-retaining-customers-is-more-important-than-attracting-new-ones>

CVC could also consider adding a class of membership for businesses and institutions, which is allowed for in the CVC bylaws. The Outreach Committee could discuss creating a business discount program so that, for example, CVC members could get a discount at a local pizza shop, or admission to a local museum. While this strategy may not rain down new members, it is an opportunity to introduce the CVC to businesses and opens the door to discuss all of the sponsorship and advertising opportunities across all of the CVC program areas, mile markers, sampling sites, and the others.

As always, membership growth data should be tracked and presented to the board, ideally compared to a previous period, with such data as # members, # new members, % of members renewing

Increase Donations

This planning process began with an expressed desire of the Board to increase the dollars provided by members, donors and sponsors. When an Executive Director is engaged, CVC will be in position to develop and implement a comprehensive fundraising plan, which would include recommendations for increasing memberships, sponsorships, donations, foundations gifts, fee-for-service and other revenue.

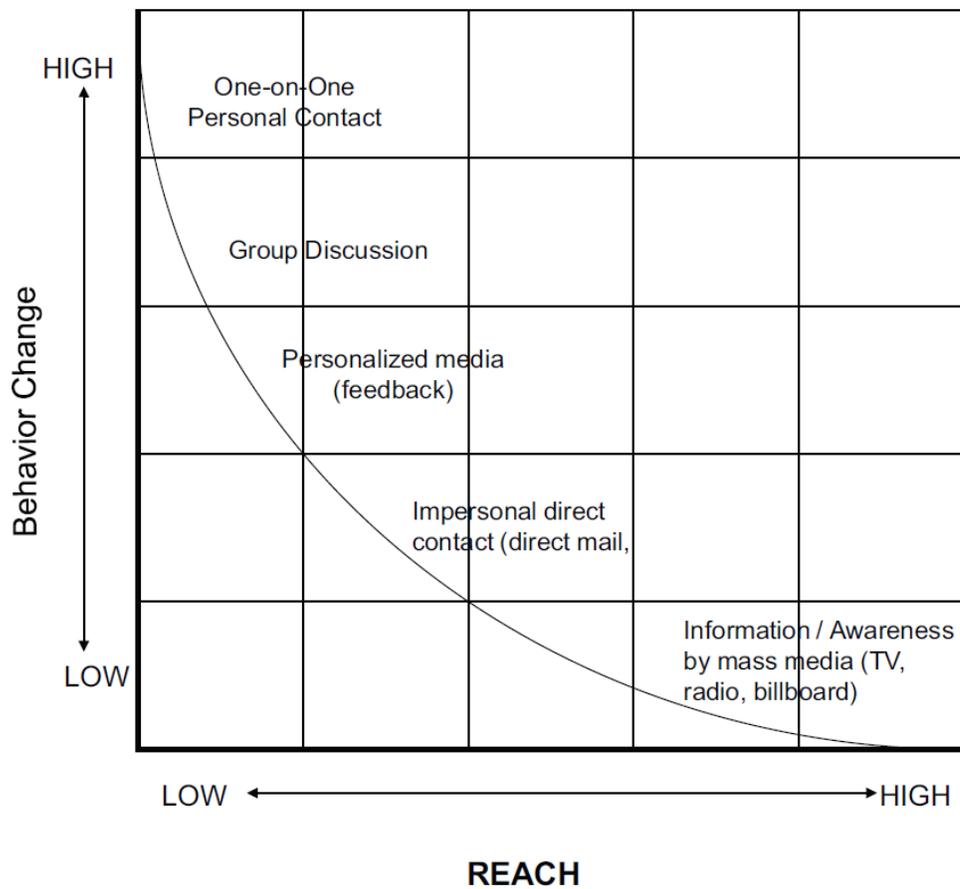
Until that time, CVC should continue with its existing Fund Development Plan, in particular events, individual donations, memberships and sponsorships. Recurring online monthly donations could be added to the Fund Development Plan and is available through CVC's current online donation portal, PayPal. (Major gifts and endowments might best be put on the back shelf until an Executive Director with fundraising experience is engaged.) It will be important to prepare CVC's ambassadors (see Goal #3) and for the Board to adopt a Board Member Responsibility policy (see above), which will include fundraising responsibilities. One-on-one, face-to-face asks are the single most effective way to raise funds. The current committee members have not felt equipped to make the "ask," which suggests that training is in order, or re-populating the committee.

As always, results should be reported to board, ideally alongside the previous period: # donors, \$\$ donors, % repeat donors.

Goal #3: PROMOTION
Build Awareness of CVC

The CVC has a nice body of projects, and it could be said that it's biggest task is to knit them together into a cohesive approach to the mission, and to communicate the work and the results clearly and consistently to investors, partners and constituents. A full-blown Marketing Plan may lie in CVC's future once an Executive Director is engaged, but on the short term CVC can benefit by strengthening its communication tools and brand infrastructure.

While there are many ways to promote CVC, the best way is through personal contact, something board members are especially positioned to do given their wide networks. But there are other means that CVC also has available, including feedback from trail users, event evaluations, direct mail, and the organization's website and social media. Having a variety of outreach and promotion tools is necessary to the work of any nonprofit.



Groom CVC Ambassadors

There is one best way to convey the CVC brand, and one best way to get and keep a volunteer, a member, a donor or a sponsor, and that is through face-to-face communication. Every board member, every staff person is an ambassador for the organization and should be prepared to talk about CVC, the collective CVC. CVC ambassadors should be comfortable relaying the mission, and conversant in the CVC’s history, accomplishments and current strategy in all focus areas.

With the work that CVC’s Program Committee will do to clarify strategy and outcomes, ambassadors will be better equipped to talk about all that CVC does,

and why it matters. Several board members have indicated they are comfortable with public speaking, and their talents should be put to work at events or the annual meeting for example. Others will be more comfortable on the phone, or over a cup of coffee. Smaller gatherings at people's homes can be an opportunity to introduce CVC to a group of people invited by a volunteer host, with CVC bringing the wine or refreshments.

CVC should deploy some CVC ambassadors to meet with elected officials and their staff, to re-introduce the organization and present the annual project strategy and outcomes. Senators and Representatives will surely respect CVC's work, particularly when the extent of CVC's membership and constituency is articulated.

Sharpen Media Tools

- Revamp [CVC Website](#)

Generally speaking, an organization's website connects it to the world, and is a chief means of broadcasting what the organization does, why it matters and how the organization is different. On the other hand, an outdated website implies that an organization has poor administrative infrastructure, and an inability to stay current.

CVC may have seen a decline in internet traffic following Google's recent decision to favor mobile-friendly web pages. Only the websites that are designed to fit smartphones and tablets will appear at the top of search results. The Bayer Center for Nonprofit Management has audited the CVC website and recommends that the site be mobile friendly, and has a number of additional recommendations for change.

Through the acquisition of Natural Biodiversity Inc., CVC has inherited a second website. While the content on this site is attractive and informative, it leaves the very real impression that Natural Biodiversity is a separate organization; the site invites people to become members of Natural Biodiversity Inc. and make donations through PayPal. The two must be reconciled ASAP.

Redesign of the website should be undertaken with professional help, someone who can design the site for improved aesthetics and functionality, but who can also assist with re-organizing and unifying the content, and options for online donations.

It should be noted that the CVC does an excellent job uploading current news and events through their volunteer webmaster. He is the first to say, however, that the site needs an overhaul.

- Unify CVC Annual Reports

Currently CVC issues the [CVC Annual Report](#), and also issues [The Stream Team Annual Report](#). Going forward, reports should be merged and issued as a single Annual Report. If the Board finds that it is important to publish them separately, rename the Stream Team Report to “State of the Streams” so as not to imply that the Stream Team is a separate entity. The term “Annual Report” is traditionally reserved for corporate entities, and not for their departments.

The Annual Report can continue to be an excellent medium to report to the community on progress toward the CVC mission, strategies and projects. While awards, gifts and grants are important to mention, the organization’s progress toward goals, the difference that CVC is making, should be in the front seat.

- Employ Social Media

The CVC’s Facebook reveals that the Stream Team is posting regularly, with interesting items and images. The CVC should appoint some additional Facebook administrators that can add postings related to Access and Outreach. There are a number of webinars and workshops to help nonprofit staff and volunteers learn how to make better use of social media, to grow their audience and move friends and followers to a new level of participation in the organization. The Executive Committee, who in the absence of an Executive Director will be monitoring and evaluating staff and quasi-staff, should encourage their professional development in this area and others.

- Professionalize Email Marketing

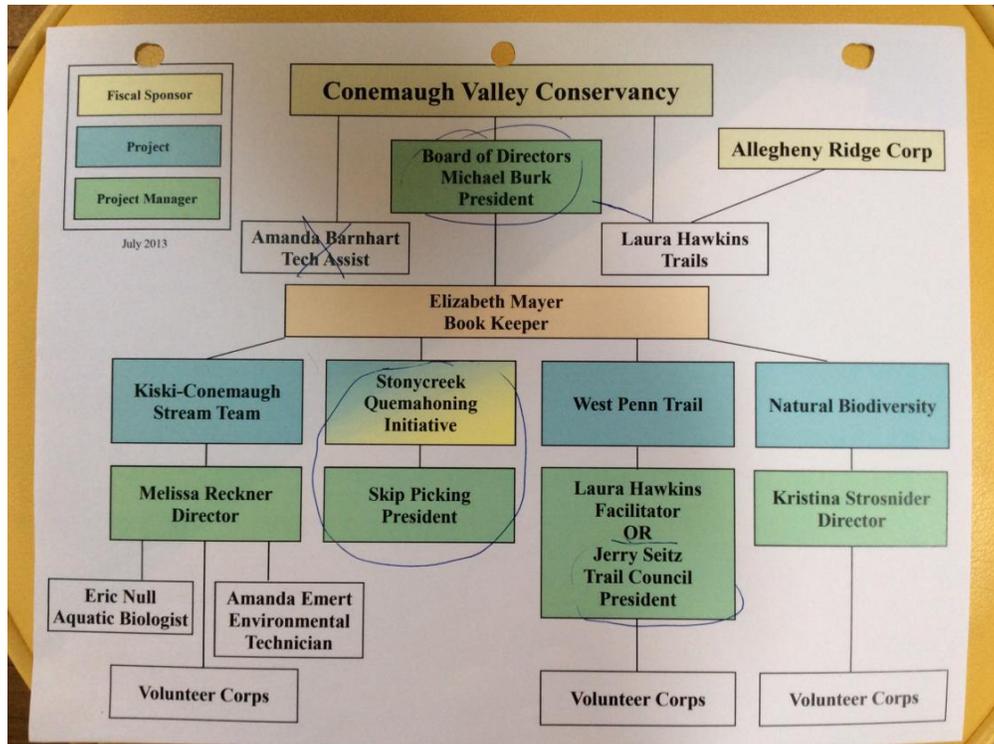
When marketing via email, whether issuing the newsletter or broadcasting an event, CVC should make sure the message is mobile-friendly and offers an opportunity for someone to add (or remove) their

name. A product such as [Constant Contact](#) will organize the names of CVC contacts, providing a system for targeting messages to specific groups of subscribers and provide metrics that reveal who is reading (or not reading) the message, and which links are being followed.

In addition, all staff should be corresponding with a common CVC domain (eg, susieq@cvc.org) with an agreed upon closure common to all staff (eg, "Join us at CVC's Annual Sojourn June 12"). Check out the free service [Google for Nonprofits](#).

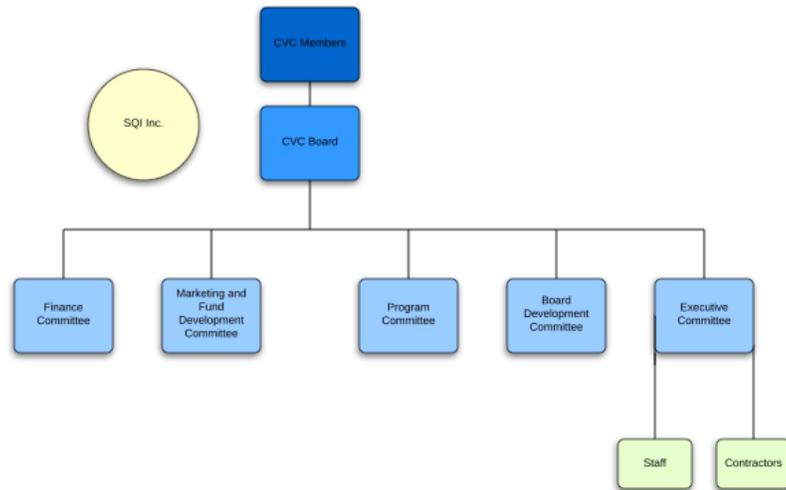
Goal #4: STRUCTURE

Reorganize CVC's Organizational Structure

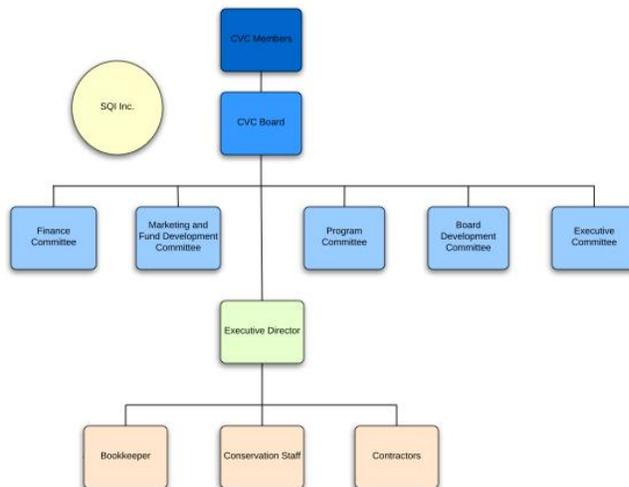


CVC Current Organizational Structure

CVC Organizational Chart A



CVC Organizational Chart B



Engage an Executive Director:

CVC has added new programs, new staff and a new event in recent years which has increased administrative demands and the need for support functions. CVC should consider engaging an executive director to knit together the organization's parts — staff, board, committees, volunteers — and the organization's programs — conservation, access and outreach. (See CVC Organizational Chart B above.)

The Executive Director could be thought of as an Administrator, leaving the technical program management as is initially, in the hands of board members and staff, with the Executive Director acting as *impresario*, ensuring that programs and fundraising are planned and coordinated. Having an Executive Director would also make possible a Fundraising Plan.

It would be wise to make this position interim at first, so as to clarify job responsibilities and weather the transition from board to Executive Director management. As the job responsibilities are articulated and the line between staff and board becomes clearer, the position can be hired on a permanent basis. It may be that part-time hours will suffice, or will have to suffice on the short-term.

Among the Executive Director's key responsibilities:

- **Staff Support and Accountability:** At present staff have no job descriptions, annual work plans or evaluations. While some staff are self-directed and skilled in fundraising and grant management, others are not and require support and accountability. Certainly staff are entitled to an annual performance appraisal and cannot be evaluated without year-round interaction with a supervisor. Contractors also need to be held accountable and scope of work reviewed and adjusted if necessary. On the short term, these responsibilities will be picked up by the Executive Committee (See CVC Organizational Chart A, above).
- **Marketing and Fund Development:** An Executive Director can help solve the difficulties of the current piecemeal approach to fundraising, where each department or program area raises the operating dollars it needs, and "pays" its share of the overhead costs such as insurance and audit.
- **Board Support:** Provide support to the Board, in scheduling meetings, achieving board milestones, developing the board which is currently being handled by the ARC contractor.

- **Financial Management:** The volunteers on the Finance Committee is doing a remarkable job managing the organization's finances, however assigning this to the Executive Director will free the Committee to fulfill its planning and oversight role.

The Board has expressed concern about funding such a position. Yet with an Executive Director, CVC has greater prospects for raising operating dollars, for operating more efficiently and presenting a more cohesive and appealing picture to constituents and investors. An initial multi-year grant from a Foundation should be sought, but the request should be made only after some housekeeping is completed, much of which is recommended in this document. The Board could also consider whether the current funding being applied to engage the ARC contract employee could be re-deployed toward an interim executive director. The Board might also explore engaging the ARC contract employee as the Executive Director.

Provide Support and Accountability to CVC Staff + Quasi Staff

Management of the CVC staff should begin immediately. Until an Executive Director is engaged, CVC's Executive Committee should undertake this function. (Staff should continue to provide support to relevant CVC committees and task forces.)

The Executive Committee should obtain job descriptions and annual work plans from the staff and meet with them on a regular basis to monitor progress. Performance evaluations should be done annually and an Improvement Plan agreed upon. Staff should be encouraged to take advantage of professional development opportunities, especially in the areas of high importance to the CVC such as fundraising and community outreach.

Currently there are two part-time occasional staff that report to the project director of the Stream Team. The Executive Committee could work with the Project Director of the Stream Team to determine the need to monitor and evaluate those staff. The processes should be consistent throughout the CVC.

Similarly, the CVC Executive Committee should oversee the work of the ARC contractor who reports exceeding the contractual 7 hours per week significantly. Some of the items in the contract with ARC have been assigned to CVC's bookkeeper, such as membership renewals. There may be other items that can be re-assigned, eventually to the Executive Director. The contract should be reviewed and amended as necessary. The Executive Committee should keep their eyes on all other personnel contracts (PR Consultant, Sojourn

Consultant) although those contractors could instead report to the Marketing and Fund Development Committee or a subcommittee. The point is to ensure that each contractor is being monitored.

All personnel management responsibilities should ultimately fall to the Executive Director.

The Board could also explore creating a “Shared CFO” position with other area nonprofits that are similar in scope. The Environmental Financial Collaborative is an example that is currently operating, and expanding in Pittsburgh with the support of the RK Mellon Foundation.

Revise the Committee Structure

CVC’s bylaws currently require the following committees: Executive, Nominating, and Planning.

In practice, the board operates with the following committees:

- The Finance Committee oversees the part-time Bookkeeper to produce budgets and financial reports, process deposits and payments, manage the audit, track contracts, produce regulatory compliance reports and monitor organizational risk.
- The West Penn Trail Council maintains the 18-miles of trail owned/operated by the CVC. The Council has identified officers within the committee and is comprised of volunteers that do shovel-in-the-ground work on the trail. It does independent fundraising.
- The Conservation Committee receives reports from the Project Director of the Stream Team.
- The Sojourn Committee and the Triathlon Committee manage everything related to their respective annual events from fundraising to logistics.
- The Fund Development Committee is staffed by the ARC Contractor who has developed a Fundraising Plan to raise \$25,000. While the plan and action steps have been nicely articulated, the implementation has gone less well, with the board relying largely on the ARC Contractor. Board members are not “Making the Ask” for a variety of stated reasons, from professional conflicts to reluctance to ask for “charity”, to lack of fluency in the CVC’s history, mission, projects and impact.

Committees do not currently have formal Chairs, purpose descriptions, or work plans, nor do they have regularly scheduled meeting times, all of which should be established and approved by the Board.

The CVC Board should regroup and form the following committees with the understanding that each committee is advisory, that it is formed at the Board's discretion as a place for detailed discussion, and that all decision-making authority continues to reside with the Board.

Program Committee

Purpose: Responsible for ensuring that programs and projects have viable and sustainable strategy and are achieving their intended impacts and outcomes.

Responsibilities:

- Oversee new project and program development using agreed upon criteria
- Monitor existing programs against milestones, intended impacts and outcomes, and budget: Before — During — After
- Facilitate development of Annual Projects Plan
- Create and monitor Task Forces, if needed, to implement projects.

Meetings: Bimonthly (Because there are many board members interested in this committee, you might schedule the committee meeting to occur just before the board meeting. This will alleviate the tendency to discuss project details at the Board meeting.)

Committee Composition: Board members most interested in the organization's program areas, Conservation, Access and Outreach. This is an ideal committee to involve non-board members in the work of the organization. The CVC President is ex-officio.

Staff Support: Project and program-related staff.

Immediate Tasks:

- Identify milestones, impacts and outcomes for each existing project, with staff, if assigned.
- Review the **Regional Master Plans** and identify the CVC's role
- Work with Stream Team Project Director on the public meetings required by the River Conservation Plan Update.

Board Development Committee (Nominating in the CVC Bylaws)

Purpose: Responsible for the future viability of the board by ensuring that a range of skills, perspective and diversity is represented on the board to make it an effective and sustainable governing body.

Responsibilities:

- Clarify Board roles and responsibilities
- Determine Board composition necessary to accomplish future work.
- Ensure leadership by creating a pipeline within the board.
- Enhance Board knowledge by providing orientation and training opportunities.

Composition: This is arguably the most important CVC Committee and should be chaired by someone interested in the governance function and willing to solve problems. Committee members should be well-connected and strategic thinkers. Non-board members could include past board members. The CVC President is ex-officio.

Meetings: Bimonthly

Staff Support: In future, the Executive Director. The current ARC contract allows for some support in board recruitment.

Immediate Tasks:

- Review the current **Board Composition Matrix** and identify gaps
- Propose process to recruit candidates for board, officers and committees with an eye to the 2016 election.
- Discuss term limits and draft bylaws language for recommendation to the Board
- Identify board training needs.
- Develop a Board Member Responsibilities statement in concert with the Marketing and Fund Development Committee.

Marketing and Fund Development Committee

Purpose: Responsible for the general awareness and perception of the CVC, and for attracting the resources required to implement its mission. It is important to convey, with a variety of communication media, a results story that is compelling to investors of all kinds — foundations, government, business, individuals and volunteers.

Responsibilities:

- Work with staff to create and implement an annual fundraising plan incorporating a series of appropriate vehicles, such as grants, special events, direct mail, product sales, and fee for service contracts;
- Implement the board's portion of the development plan;
- Monitor subcommittees that plan and implement fundraising activities such as the Sojourn, the Triathlon, member outings, and Stream Team fundraising events;
- Oversee the development and use of CVC communication tools.

Meetings: Monthly

Committee Composition: This committee should be chaired by a CVC board member, but urgently needs to recruit volunteers who 1) find development a meaningful activity and who can be fundraising models for the other directors and 2) have expertise in marketing, website design and social media. The CVC President is ex-officio.

Staff Support: Some of the ARC contract employee's time is directed to this effort at present. In future the committee would be supported by the Executive Director.

Immediate Tasks:

- Partner with the Board Development Committee to articulate roles and performance expectations of board members in the area of fund development.
- Review the existing Development Plan and add columns for "Responsible Party" (staff or board names) "Due Date" and "Resources Needed" (training, access to database, boilerplate, etc); Deliver a regular written and spoken report to board on progress toward annual goal (\$25,000); identify and articulate consequences to full board if fundraising goal goes unmet.
- Prepare RFP for website overhaul.

- Discuss creating business class of membership and member discount program
- Recruit and train additional Facebook administrators to cover Access and Outreach activities
- Merge all CVC contacts (Stream Team, West Penn Trail, Natural Biodiversity) into a master CVC database.
- With staff, compile and unify CVC requests for volunteers and requests for donations⁴: Mile Markers, benches, adopt a site, event sponsors, and advertising opportunities.
- Review 2015 member and donor retention stats; make calls/visits to those who have not renewed.

⁴ CVC has routinely registered with Pennsylvania's Bureau of Charitable Organizations, however all requests for contributions, whether online or in print, must include language required by Section 162.13 of the [Solicitation of Funds for Charitable Purposes Act](#).

Finance Committee

The Finance Committee is to be commended for their excellent and detailed work to manage the organization's finances on behalf of the board and to oversee the Bookkeeper. Clean audits year-after-year are evidence of a job well done. The Committee has also ensured legal compliance, preparing and filing reports the State and the IRS and educating the board on Conflict of Interest issues. This Committee's focus should continue.

Purpose: Ensures that the CVC is financially viable, is meeting its fiduciary and compliance responsibilities and is protected from risk

Responsibilities:

- Maintain accurate and complete financial records
- Present accurate, meaningful and timely reports to the board
- Help the board understand the CVC's financial affairs and associated concerns.
- Oversee budget preparation
- Monitor investments
- Safeguard organizational assets and manage risk
- Ensure compliance with laws, regulations and contracts⁵
- Oversee selection of auditor and audit

Committee Composition: In the absence of an Executive Director, the Finance Committee must itself have financial management skills. Equally as important is for at least one committee member to have the ability to communicate to the rest of the board the organization's financial status. The CVC Treasurer should chair this committee and the Assistant Treasurer should serve on it. The CVC President is ex-officio.

Meetings: Monthly.

⁵ CVC has routinely registered with Pennsylvania's Bureau of Charitable Organizations, however all requests for contributions, whether online or in print, must include language required by Section 162.13 of the [Solicitation of Funds for Charitable Purposes Act](#).

Staff Support: Currently provided by the bookkeeper. In future, committee responsibilities could considerably lessen with the hiring of an Executive Director. During the budgeting process, support should come from the project directors.

Immediate Tasks:

- Because the CVC's current financial management software is no longer supported by the company, the Committee should prepare a Request for Proposals (RFP) to hire a nonprofit accounting professional to guide the organization through the process of selecting a new system. (QuickBooks is one software option, available to nonprofits at a discount at [TechSoup](#).)
- With a change in software comes an opportunity to simplify the financial reports presented to the board, highlighting the areas of greatest concern or interest to the board.
- In the meantime, the current financial report should be simplified, collapsing the number of line items. The report should highlight the board's progress toward the \$25,000 in 2015, and the consequences if it is not achieved.
- Natural Biodiversity Inc was never formally dissolved, and a formal Dissolution Plan never prepared. Consult with a nonprofit attorney on the disposition of NB's members, database, website and other assets.
- Clarify for the Board, CVC's legal responsibility to SQL.
- Develop an organizational policy for fiscally sponsoring the projects of other groups and organization. A fiscal sponsor relationship should be well understood and approved by the Board, and should NOT be referred to as a pass-through or a conduit.
- Review organizational risk and insurance protection.

Executive Committee

A nonprofit's Executive Committee is oftentimes formed to address matters that arise between board meetings, or emergencies. The committee might also develop agendas for board meetings and lead the process to evaluate the Executive Director. CVC's Executive Committee, though created by the bylaws, has not been needed. This is an ideal situation for a nonprofit and eliminates worries about an Executive Committee becoming too powerful or the Board itself taking a back seat to the Executive Committee. Recently, though, needs have arisen around personnel matters that could be best managed by the CVC's most seasoned leaders, the key officers of the organization.

Purpose: Makes recommendations to the entire Board on matters referred to it from time to time by the Board at large.

Responsibilities:

- Manage CVC's personnel in the absence of an Executive Director
- Other matters that the Board may from time-to-time assign

Meetings: As needed

Committee Composition: Key officers

Staff Support: determined issue-by-issue

Immediate Tasks:

- Oversee development of staff job descriptions and 2015 Work Plans
- Develop staff monitoring and evaluation tool in collaboration with staff
- Analyze contract with Allegheny Ridge to determine if any items in the current scope can be delegated to the Bookkeeper.
- Identify staff training and development opportunities
- Draft a job description for a part-time, interim Executive Director
- Prepare proposal for 3-year operating grant to enable hiring of an Executive Director and transition to new financial management software.

Appendices

- CVC Summary Brochure
- Current Projects
- New Pre-Project Evaluation Tool
- Sample Post-Project Evaluation Tool (Sojourn)
- Proposed Organizational Chart
- Board Member Skills & Qualities Matrix
- Analysis of 2015 Board Member Skills
- Summary of Board and Staff Interviews
- SWOT
- Mission Worksheet
- Environmental Scan
- Organizational Assessment Tool Summary
- Sample Committee Report to Board



Purpose

The CVC works to protect and restore the health and beauty of the Kiski-Conemaugh River Basin and to strengthen connections between the people and the land.

Vision

Government, businesses, nonprofit organizations and community residents throughout the Kiski-Conemaugh river basin work together to manage the water and land resources for economic vitality and ecological health.

Core Competencies

Community-Based: CVC believes that restoring the watershed is the responsibility of everyone. As a membership organization open to all, CVC offers opportunities for community engagement, education, advocacy and stewardship.

Committed Board: The CVC Board holds deep knowledge of community needs, resources and the Basin's landscape. It is fiscally responsible and well-connected.

Productive: The CVC can rally resources, including volunteers, in-kind support and cash, to complete and maintain projects. The CVC "does a lot with a little."

Skilled Staff: CVC employs a skilled and committed staff of five.

Key Initiatives

Conservation

Improves the water quality and biodiversity of the Kiski-Conemaugh River and its tributaries through planning, monitoring and advocacy.

Access

Plans, builds and maintains the land and water trail system throughout the basin, connecting it to community amenities, and promoting its use.

Outreach

Increases public awareness of the Basin, creates opportunities for stewardship, and invites financial support for the work of CVC.



Conservation

- River Conservation Plan Update
- Acid Mine Discharge Monitoring
- Berkebile Run Limestone Dosing
- Upper Red Eyes Feasibility Study
- Babcock Creek Pest
- Shade-Coal Run
- Landscape Design Conemaugh Gateway
- Knotweed Maintenance
- Knotweed R&D
- Shade Creek (C-Saw)
- Black Legs (C-Saw)
- River Conservation Plan Update

Access

- West Penn Trail Maintenance
- Jim Mayer Riverswalk
- Que Mountain Bike
- Whitewater Park
- Roaring Run Trail Connection
- Blairsville Bridge
- Seward Boat Launch
- Conemaugh Gap Gateway
- Johnstown Greenway

Outreach:

- Sojourn
- Triathlon
- Trout in the Classroom
- Innovative Invasive Species
- Knotweed Coalition
- Nutrition for Healthy Kids
- River of the Year - Loyalhanna
- Member Outings

	River Conservation Plan Update (RCP)				
			Biological Monitoring Service		
	Acid Mine Discharge Monitoring				
		Data Loggers	Data Loggers		
			C-SAW Blacklegs		
	Path of the Flood Trail				
	WPT+ Roaring Run Connection				
		Blairsville Bridge - Planning			
		Seward Boat Launch			
		West Penn Trail (Maintenance)	West Penn Trail (Maintenance)		
		Johnstown Inclined Plane Park(brad?)			
			Conemaugh Gap Gateway Project		
	Trans Allegheny Trail Alliance (Trail Planning)				
	Sojourn	Sojourn	Sojourn		
		Triathlon	Triathlon		
	Trout in Classroom (TIC)		Trout in Classroom (TIC)		Trout in Classroom (TIC)
				member outings	member outings
				River of the Year	
		Johnstown Heritage			
		Lift Johnstown			

CVC New Project Evaluation Tool

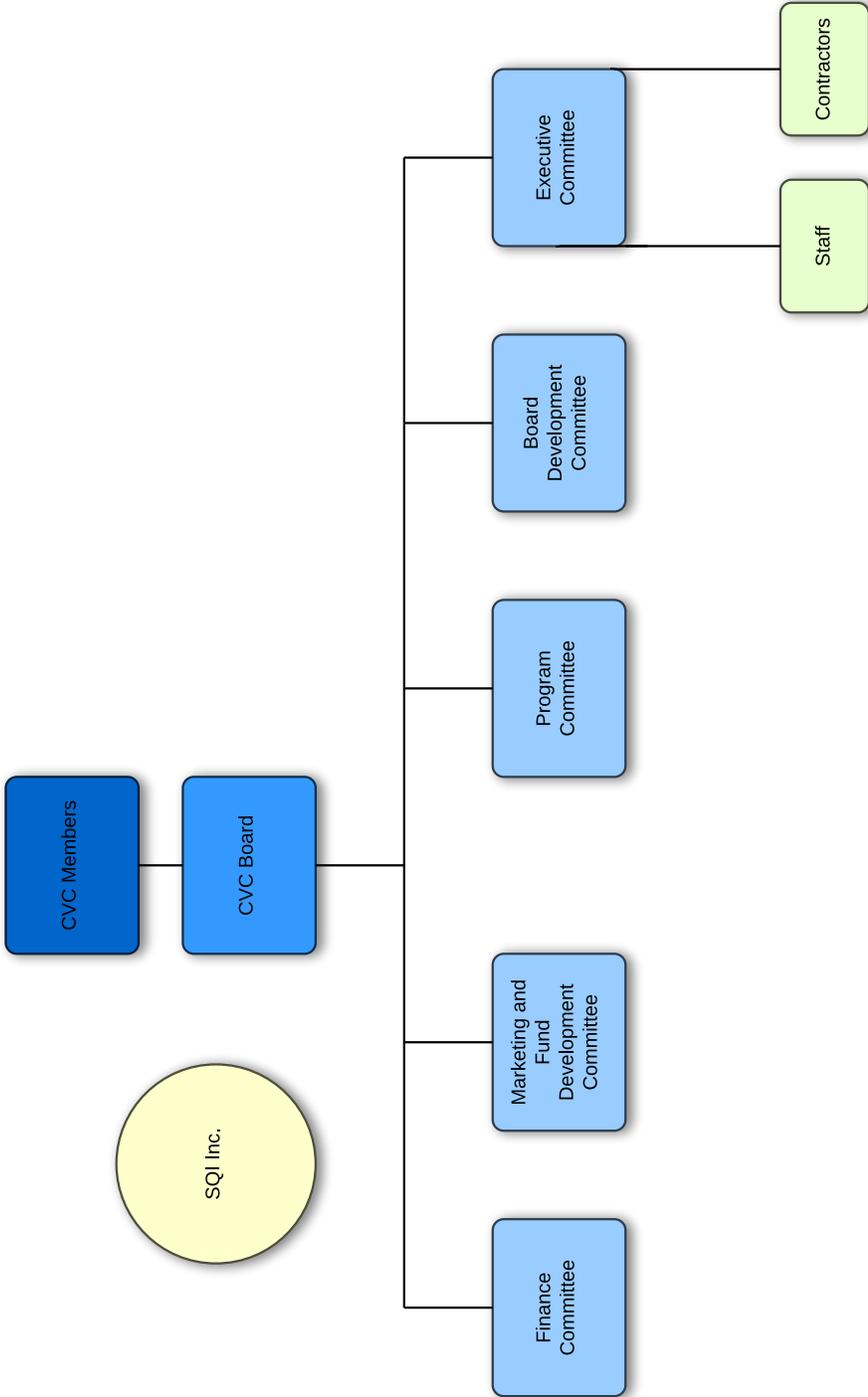
	GO!	No-Go	Re-Consider	Notes
Project Concept				
What is the project?				
What are the intended outcomes/ impacts?				
How are the outcomes measured?				
Who is the project manager?				
What committee would oversee it?				
What are the risks?				
Estimated costs?				
Mission Impact				
Is it consistent with the CVC mission?				
Where will the project occur?				
Need/Opportunity				
Is the project mentioned in one of the Master Plans? At what priority?				
Does the community support the project?				
Can another organization execute the project, or part of the project?				
Resources Needed				
<i>Human Resource</i>				
CVC staff				
CVC administration				
Board and committee responsibilities				
Partners				
Consultants				
Volunteers				
<i>Financial Resources</i>				
Sources of start-up funding?				
Sources for ongoing funding?				
Is earned revenue possible?				
<i>Other Resources</i>				
Training and Development				
Partners needed				
Other				
Other				

	River Conservation Plan Update (RCP)				
			Biological Monitoring Service		
	Acid Mine Discharge Monitoring				
		Data Loggers	Data Loggers		
			C-SAW Blacklegs		
	Path of the Flood Trail				
	WPT+ Roaring Run Connection				
		Blairsville Bridge - Planning			
		Seward Boat Launch			
		West Penn Trail (Maintenance)	West Penn Trail (Maintenance)		
		Johnstown Inclined Plane Park(brad?)			
			Conemaugh Gap Gateway Project		
	Trans Allegheny Trail Alliance (Trail Planning)				
	Sojourn	Sojourn	Sojourn		
		Triathlon	Triathlon		
	Trout in Classroom (TIC)		Trout in Classroom (TIC)		Trout in Classroom (TIC)
				member outings	member outings
				River of the Year	
		Johnstown Heritage			
		Lift Johnstown			

CVC New Project Evaluation Tool

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Sources of start-up funding?				
Sources for ongoing funding?				
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<i>Other Resources</i>				
Training and Development				
Partners needed				
Other				
Other				

CVC Organizational Chart A



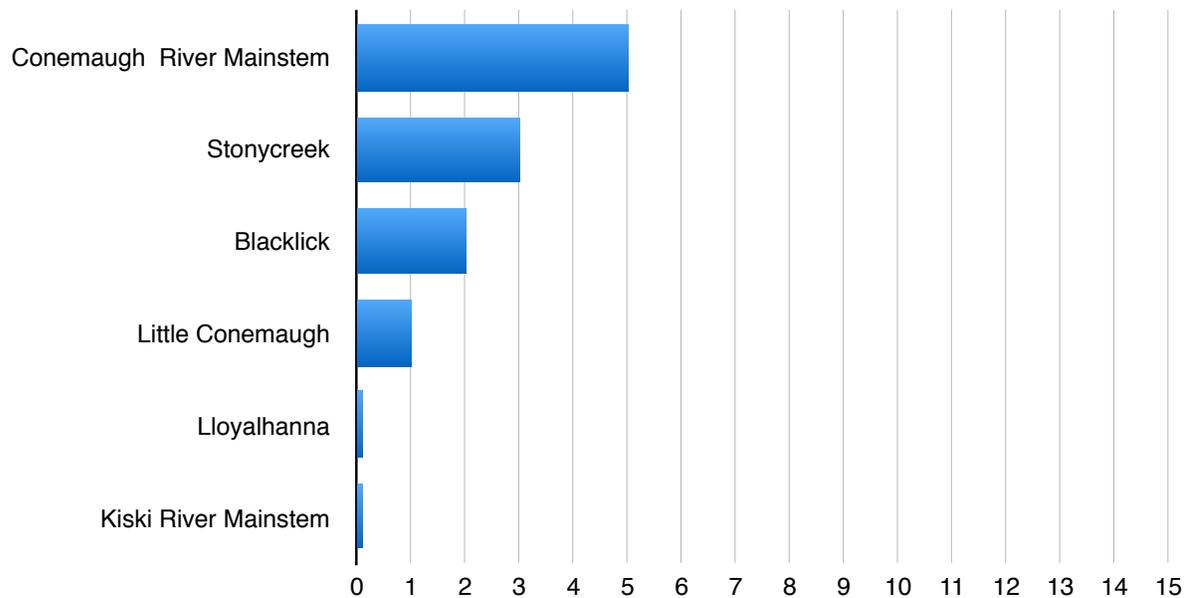
CVC BOARD MEMBER SURVEY SUMMARY

11 Board Members responded
4 did not (Kane, Tuscano, Volpe, Sutliff, McCombie)

Years of Board Service

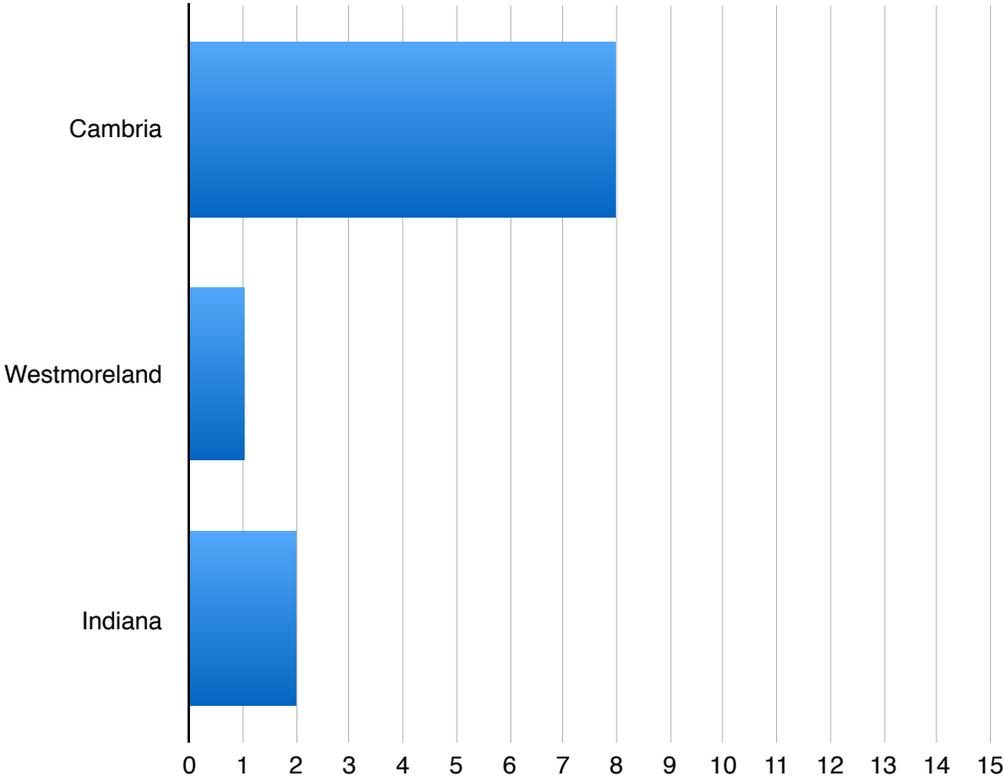
Of the 11 board members reporting, the average years of board service is 10.
Six board members have served for more than 10 years.
Two are around 20 years of service.

Watersheds Represented



One third of the CVC Board (5) hail from the Conemaugh River Mainstem. There is representation from Stonycreek (3), Blacklick (2) and Little Conemaugh (1). No representation from Kiski River Mainstem or Loyalhanna.

Counties Represented



Committee Interest

Program Committee

Rick Bloom
Mike Burk
Brad Clemenson
Leanna
Jack Maher
Jerry Seitz
Jim Stratton

Board Development Committee

Mike Burk
Richard Burkett
Brian Gunnlaugson
Jack Maher

Marketing & Fund Development Committee

Linda Gwinn
Kenan Kevenk
Leanna

Finance Committee

Mike Burk
Richard Burkett
Kenan Kevin
Jack Maher

Board Member Connections

Local Government

- Cambria County Conservation and Recreation Authority
- City of Johnstown
- Indiana County Zoning
- Indiana Borough Manager and Council
- Many unnamed
- Westmoreland County
- New Alexandria
- Loyalhanna
- Saltsburg
- Blairsville Borough

State Government

- State Rep Bryan Barbin
- State Senator Wozniak
- Many unnamed

Nonprofit

- Stackhouse Park (Johnstown)
- Indiana County Endowment
- Many unnamed
- Regional Trail Corporation
- Westmoreland Heritage Trail
- C&I Trail Council
- Benscreek Canoe Club
- Blairsville Community Development Authority
- Trans Allegheny Trail Alliance
- Indiana County Chamber of Commerce Tourist Bureau
- Regional Bike and Ski Clubs
- Penn Environmental Council
- SQI

Business

- Many in Johnstown area
- Tuscano Maher Roofing contacts
- Measurement Instruments

Highlights of Knowledge, Expertise, Competencies and Interests

Financial Management: There are 4 board members with nonprofit financial management expertise, all have been with the CVC for 12 years or more. Recommend recruitment of a new board member or two interested in financial management and can help with the transition to new financial management software, and/ or who are well-suited to present the financials to the rest of the board in a non-technical fashion.

Human Resource Management: CVC's president alone has experience in Human Resource Management. Since CVC is an employer, and without an Executive Director at present, recommend adding a board member with this experience.

Marketing/PR: While there are several board members interested in this topic, no one listed professional background. CVC should seek out a board candidate with expertise in marketing and social media.

Fundraising: 4 board members have experience in, or are interested in fundraising. Any new CVC board prospects should have experience or interest in fundraising for the organization. These board members should be offered training in this topic. Courses are available at the Bayer Center for Nonprofit Management as well as other sources, including online sources.

Public Speaking: 6 board members offered their public speaking skills to the CVC. These folks should be put to work immediately!

1. When did you join the CVC Board? Why? Why do you serve now?

- 2003; Was volunteer on trail infrastructure projects; champion of outdoor recreation.
- 2002; Recruited by founder based on interest in outdoors; likes board mix of dreamers (fundraisers) and doers
- Early 2000s; Interest in trail infrastructure as aspect of community development; represents part of CVC's footprint
- 1994; Recruited by founder; overlaps with professional work to build cultural tourism
- 2000; Brought relationship with a partner organization; Interested in sustainable use of natural resources.

2. In your own words, what is the mission of CVC? How, if at all, would you change the mission?

- Triple purpose: 1. restore and protect environment; be vigilant so industry doesn't re-contaminate rivers; 2. Get people outdoors on trails; connect trails and complete loops. 3. Raise awareness about environmental protection.
- Started as conservation org. and morphed into trail building org. Now that most of the trails are built, it's heading back toward the conservation focus. Trails are more Indiana County, conservation is more Cambria-oriented
- Conservation and preservation of natural resources for the environment and for viewing the environment as a resource for people; Natural Biodiversity brings an opportunity to expand how the CVC mission is executed to the landscape that connects the water to the trails
- To promote trails and water quality and conservation in general
- To promote the conservation and preservation of natural, historic and cultural resources through low-impact recreation activities and the restoration and preservation of natural resources; we should do more advocacy
- "It's been a long time since I've heard the mission of the organization." It would center on a dual role of conservation and recreation;
- To remediate environmental issues; make recreation resources available
- To promote and facilitate conservation of natural resources in the 3-county region.

Board Retreat Summary

3. How do SQI and NB fit into the overall operation and mission of CVC? What are the particular challenges and opportunities of these alliances?

- Natural fit; many parallels; CVC has much broader spectrum of issues
- SQI does with rivers and the lake what CVC does with trails;
- NB seems to fit with stream restoration efforts
- They're a perfect fit with CVC but must sustain themselves (with the Board's help); will be challenging to fund administration.
- CVC has a very active trail group and cultural/historic/recreation focus; Conservation is not as prominent in their work as it might be, NB could strengthen that portion of the work;
- NB brings a few opportunities
 - o Ability to look at the landscape
 - o Knowledge of native plants and plant communities
 - o Land and landscape restoration for projects
 - o Invasive species control internally rather than contracted out
 - o Landscape architecture and design
- Need an effective way to communicate to the public that NB is part of CVC
- NB - "I would love to see more natural biodiversity projects because we are surrounded by a river that has Japanese knotweed all around it, and our bike trail follows it."
- It's a challenge to get NB off the ground;
- SQI - it's world class and attracts a lot of people
- SQI doesn't impact all parts of CVC geographic footprint
- Opportunities - easy collaboration;
- Challenges - Different missions; How funders will be approached for grants - separate by program areas or as an umbrella org? How will funds be divided? How will CVC costs be shared?
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4. What do you feel is the single biggest problem or challenge currently facing CVC?

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- Funding;
- Funding to maintain the programs;
- We've come up with small fundraisers like Triathlon, advertising on trails - we need to take some lessons from Westmoreland County; maybe combine with Indiana and Cambria Counties;
- Money's tight everywhere;
- Fundraising since RKM general operating funds have gone away;
- Fundraising; Only a handful of folks are really actively involved to make things happen
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- FR is not adequate; the group isn't sustainable in the long run;
- 3% of budget went to admin. and 1% to FR last year; We need more admin even while keeping it minimal; RKM operating support has never been replaced;

BOARD

- Aging Board
- BOD is aging;
- Getting younger people involved, esp. on BOD (by younger, I mean 50)
- Attracting younger people
- We need somebody who's good at FR on the Board;
- Board needs to be more engaged in FR;
- What can we do different to entice new people from outside? Things may be getting a little stale.

COMMUNICATION

- Getting the message out
- Public outreach and awareness
- Website could be much stronger;

PROGRAM PRIORITIES

- Norfolk Southern challenge at the east end of the West Penn trail where it comes to about ½ mile of Blairsville riverfront trail. Connection is blocked by rail width trail that Norfolk Southern won't allow. This could then connect to the Trans-Allegheny Trail east of Blairsville;
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- We rely on program personnel to come up with project funds, but what's the glue that holds this all together?
- Lack of a paid staff person;
- Integration of its multiple branches & communication of what/who it is;
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 - Build some more trails; Conemaugh Valley Gap; Link the trails; Finish trail into Blairsville;
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 - The addition of Natural Biodiversity programs
 - Strengthening Board and volunteers
 - Uniting trails, water, and landscape all under one organization gives a strong opportunity to address conservation and preservation cohesively
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- Broad base of members - everybody knows somebody; Use meetings and gatherings to drive membership and engage members in recruitment
- Community and civic groups like Rotary, Moose, sportsman's clubs, etc.; Clubs with bars have to reinvest back into community groups
- Annual donors

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- Transportation enhancement grants for trail building - but you have to have the property and studies done and we don't have that yet
- State programs such as C2P2 grants;
- DCNR pay for bridge design with local match;
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- Foundations, esp. for on-the-ground projects without burdens of state grants
- Project funding - not generating big numbers right now, but there is still opportunity here - this is harder without a fulltime project manager anymore;
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7. How would you like people to think of CVC 20 years from now?

- Trusted Resource for education, information and being plugged into funding sources
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- An organization that did a lot with a little
- CVC is a well-rounded org. that gets things done and is truly interested in improving and preserving the natural and cultural heritage of our region
- A leader in conservation; a recognized name for good works and impressive projects
- More fishing and clean streams because of CVC;
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- They connected communities by putting segments of trails together.”;
- Conservation - land, water

8. What else do you feel it is important for us at the Bayer Center to know or attempt to address as we proceed through this planning process?

- We need to develop brief pithy messages of 5 key points people should know about CVC; Logo and visual imagery are important;
- Develop a big, exciting, marquee fundraising event; for instance a beautiful photography event with product sales from it as a poster; Daimon does photography, lay-out and design, business development, marketing - may be interested in helping in this area for CVC
- I think we're okay with money and people to keep trail open for at least next 5 years
- The most beneficial thing to come out of the strategic plan would be a cohesive strategy to communicate all that CVC is with its multiple parts.
- It would be helpful for CVC not to assume that everyone knows what or where they're talking about when they mention a stream or trail.
- NB recently updated its website: naturalbiodiversity.org - the Initiatives page is a resource about NB;
- Blend Natural Biodiversity with CVC so it's not an outlier: 1 Environmental education 2 Outreach 3 Invasive species control 4 Native plants and restoration 5 Landscape design
- How do we garner support from people who grew up here and became successful? (e.g., David Conrad; President of Allegheny Ludlum)
- Revise the mission statement
- Offer employee benefits;
- CSAW - Consortium for Scientific Assistance to Watersheds - provides capacity TA to other watershed and environmental groups; this is administered and funded in the Poconos; Stream Team is a technical advisor for this group and NB is a subcontractor to them; We need to market the availability of these services
- Goals - do we want more staff? Larger presence? Office? To operate an environmental education center?
- JAHA has provided accounting support to CVC and a desk; CVC was originally a volunteer, ad hoc org. that was intended to do its project and go away ; CVC has been offered land but turned it down in the belief that other, more "established" groups could take it and do this work;
- Nobody knows who we are; We're trying to address this by hiring Hirst Media Group and our newsletter; "
- Little Conemaugh was probably the most degraded stream in the Eastern US, although it's the right color now." A handful of sites contribute about 80% of the pollution load

- We don't have the resources to conduct a professional fundraising campaign and link with the potential constituency; “
- I don't envision a time when we'll have an ED and staff to run the org. I'm all for it, but I haven't heard anyone express this as a goal;
- We haven't addressed acid mine drainage;
- Johnstown was a site for city folks to come for recreation UNTIL coal was found and until the flood;
- It's been a surprisingly aggressive group.
- It's an amazing group in a lot of ways.
- The thought was that the more you spend, the less sustainable it is; But that's not necessarily true.
- CVC struggles with the question of whether to be membership-driven or keep things at the bare minimum and go after private foundation funding. Membership requires human capital that might otherwise go toward projects, so I'd rather see us not focus on this.
- The large geographic footprint might preclude attracting good board members that live too far away for board meetings
- SQI has partnership with PEC to allow Brad Clemenson to help with some projects;
- Stream Team was on its deathbed before CVC ;
- Cleaned up streams may become vulnerable to AMD again?
- New projects shouldn't detract from CVC core programs.
- Government resources are down,
- Partnering among orgs has been really helpful, but it's tough to maintain that because of insurance costs; An umbrella insurance policy for all of the orgs under one policy that we all contribute to would be a huge help;
- land management issues are a challenge

Opportunities (trends and needs) *Exploit and Expand!*

Growing Greener III?

New Governor

Intermodal consultant

Marcellus Shale funding

Act 13: watershed and recreation

There are many foundations CVC has never approached

Mainline Greenway Initiative

And other trends to network and connect trails

Threats (trends, changes, could inflict harm) *Avoid! Thwart!*

Declining government funding

Unstable government funding

High administrative requirements of government funding

Intermodal funding needs sophisticated applicant

Decline in foundation giving?

Remaining gaps in CVC trail network are difficult to accomplish

Strengths (can be used to perform) *Build and Enhance!*

Skilled and dedicated board

Skilled staff

Extensive volunteer involvement (data available)

Board is well connected to local government, other nonprofits

Organization is nimble, can respond to needs

Is forward thinking about maintenance when undertaking trail development

Is fiscally responsible

CVC “does a lot with a little” - avoids too much overhead and need to “feed the beast”

Board will do what it takes to get projects done; project-focused.

Endowment

Produces Annual Report past 3 years

Facebook 600-700 likes

Website is maintained by reliable board member, makes changes quickly

Can take online donations via PayPal

Successful Events: Triathlon, Sojourn, and member outings

Triathlon - new event that attracts younger constituency; done with West Penn Trail Council

Staff surveys event participants: Laura has results

Volunteers do intercept surveys on trail: Laura has results

CVC could ramp-up advocacy efforts

Weaknesses (prevent performance) *Resolve and Reduce!*

Geographic spread 1,887 square miles - difficult to hold member events

Communications are fragmented, both internal and external.

Fragmented public relations hurts fundraising

Too many people are unfamiliar with CVC

Need to raise CVC profile

Need to engage FB friends into the work of the organization: make them donors and volunteers

Need to engage Sojourn and Triathlon event participants into the organization: members, donors, volunteers.

Social media is under-utilized

Produces separate Stream Team Annual Report; rename to State of the Streams or something so Annual Report message isn't diluted.

Website needs overhaul, convert to Word Press

Need to be systematic and thorough when deciding whether to take on new projects; fully articulate pros, cons and costs of a potential project.

Project focus leaves operational tasks undone, or done piecemeal

Organization not cohesive

"Dual Mission" difficult to convey and for community to understand

Board's project focus leaves little time to be organizational ambassadors

Geographic spread - difficult to attract board members

Board is largely white, male, older; reflective of donor profile in Environmental Scan.

Need board succession plan

Need to find way to cover operating costs

Need to convey to stakeholders that trail development takes a long time.

Sustainability: human capital, board members, staff and volunteers

Sustainability: financial

Mission

Geographic spread: Kiski-Conemaugh River Basin. (Kiski-Conemaugh Watershed is technically accurate but lay people do not typically understand what a watershed is.) The Stream Team's footprint is articulated in the Stream Team's 2013 Annual Report.

Protect

Restore

Educate

Steward

Connect (trails)

Develop (trails)

Nature-based, land and water

Vision

High quality of life:

Clean water

Viable economy

Healthy people

Engaged citizenry (in stewardship of the river basin)

More residents

A visitor destination

Staycation

Recovered from past exploitation of natural resources

Group 1: How can CVC make good decisions about taking on new projects? (Jerry, Richard, Kris, Laura, Missy)

Does it align with Mission and Vision?

What's the outcome/impact?

What does it cost?

How much is needed to implement, manage and maintain?

Can someone else do the project better?

What resources are available to implement it?

- Administrative \$\$
- Volunteer support

Does the project contribute to CVC's financial stability?

How does the project raise the visibility of CVC?

What collaborative opportunities does it create?

What risks are associated with the project?

Group 2: How can CVC improve communication?

1. Combine our activities under one message with one comprehensive annual report and website. (Natural Biodiversity, Stream Team and Trails/Rec)
2. Produce regular e-newsletter; get data on "open rates" ; is informative and announces programs and resources; could do advocacy through the newsletter, eg Growing Greener III.
3. Develop message for outings
4. Push logo on items to make "brand" more visible. Make logo for all programs? Possibly work with graphic design student at University.
5. Story pitches (to news media)
6. Enhance social media
7. Optimize website (work with graphic design student at university)

Group 3: CVC Sustainability: Human Capital

Challenges:

- Aging board
- Lack of diversity: age, gender, ethnicity
- Would the CVC culture support hiring an Exec Dir? Where would the funding come from over time?

Plan:

Work with local universities, high schools, Boy Scouts and Girl Scouts - identify projects and stewardship activities, badges in the case of Scouts, recreation opportunities in the River Basin. Engage at that level then re-engage them. Engage their parents also. LEGACY WORK.

Create pool of people that could eventually lead to seat on BOD. Requires keeping database of people.

Group 4: CVC Sustainability: Financial

Board can take a role in Membership Dues, Donations, Sponsorships and Events. Staff needs to take lead on foundation and government grants, and government contracts.

Events include Triathlon, Sojourn and member outings. These are mission-based but also result in some income.

CVC has obtained a Games of Chance permit. Could present a good opportunity to raise unrestricted \$\$

Issues:

- How much do we need to raise? Need financial goals and good financial reports to see progress toward goals.
- Potential donors need to feel like they're getting something before they will make a donation; what is that?
- Are we asking the same people over and over?
- It is hard for the board to ask friends and acquaintances for money; need training and to build confidence.
- Need a plan; who will we ask? How much will we ask for?
- Need someone in charge to manage who is asking for what.

- Best to make the ask where projects are visible. (Small group says there are no projects in Ebensburg for example; yet later learn that the Stream Team is working there.)
- Need regular communication with donors.
- An annual phonathon might be a good idea, calling instead of emailing. And being together in a group could boost confidence.

Introductory comments by each retreat participant on hopes for the Strategic Planning process:

Focus

Focus

Trail resources

Seize all opportunities; can't create a new nonprofit every time there is an opportunity that will help the region

Anti-focus: we are overachievers and get more done than we should by being opportunistic.

No bike trail that can't be built; Strategic Plan is means to that end

Action focused, efficiency

CVC is umbrella, strong but malleable; strong core with branches; fuse Natural Biodiversity with strengths of CVC; need elevator speech; improve communication

See that capacity matches project commitments

Can we have a broad focus and still be effective

Work more cohesively. Focus. Smart Growth. Conservaton arm of CVC.

CVC raises maintenance funds. Sustainable trails.

(It is noted that SQI not represented, yet many CVC board members also sit on SQI board.)

1. When did you join the CVC Board? Why? Why do you serve now?

- 2003; Was volunteer on trail infrastructure projects; champion of outdoor recreation.
- 2002; Recruited by founder based on interest in outdoors; likes board mix of dreamers (fundraisers) and doers
- Early 2000s; Interest in trail infrastructure as aspect of community development; represents part of CVC's footprint
- 1994; Recruited by founder; overlaps with professional work to build cultural tourism
- 2000; Brought relationship with a partner organization; Interested in sustainable use of natural resources.

2. In your own words, what is the mission of CVC? How, if at all, would you change the mission?

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- Develop a big, exciting, marquee fundraising event; for instance a beautiful photography event with product sales from it as a poster; Daimon does photography, lay-out and design, business development, marketing - may be interested in helping in this area for CVC
- I think we're okay with money and people to keep trail open for at least next 5 years
- The most beneficial thing to come out of the strategic plan would be a cohesive strategy to communicate all that CVC is with its multiple parts.
- It would be helpful for CVC not to assume that everyone knows what or where they're talking about when they mention a stream or trail.
- NB recently updated its website: naturalbiodiversity.org - the Initiatives page is a resource about NB;
- Blend Natural Biodiversity with CVC so it's not an outlier: 1 Environmental education 2 Outreach 3 Invasive species control 4 Native plants and restoration 5 Landscape design
- How do we garner support from people who grew up here and became successful? (e.g., David Conrad; President of Allegheny Ludlum)
- Revise the mission statement
- Offer employee benefits;
- CSAW - Consortium for Scientific Assistance to Watersheds - provides capacity TA to other watershed and environmental groups; this is administered and funded in the Poconos; Stream Team is a technical advisor for this group and NB is a subcontractor to them; We need to market the availability of these services
- Goals - do we want more staff? Larger presence? Office? To operate an environmental education center?
- JAHA has provided accounting support to CVC and a desk; CVC was originally a volunteer, ad hoc org. that was intended to do its project and go away ; CVC has been offered land but turned it down in the belief that other, more "established" groups could take it and do this work;
- Nobody knows who we are; We're trying to address this by hiring Hirst Media Group and our newsletter; "
- Little Conemaugh was probably the most degraded stream in the Eastern US, although it's the right color now." A handful of sites contribute about 80% of the pollution load

- We don't have the resources to conduct a professional fundraising campaign and link with the potential constituency; “
- I don't envision a time when we'll have an ED and staff to run the org. I'm all for it, but I haven't heard anyone express this as a goal;
- We haven't addressed acid mine drainage;
- Johnstown was a site for city folks to come for recreation UNTIL coal was found and until the flood;
- It's been a surprisingly aggressive group.
- It's an amazing group in a lot of ways.
- The thought was that the more you spend, the less sustainable it is; But that's not necessarily true.
- CVC struggles with the question of whether to be membership-driven or keep things at the bare minimum and go after private foundation funding. Membership requires human capital that might otherwise go toward projects, so I'd rather see us not focus on this.
- The large geographic footprint might preclude attracting good board members that live too far away for board meetings
- SQI has partnership with PEC to allow Brad Clemenson to help with some projects;
- Stream Team was on its deathbed before CVC ;
- Cleaned up streams may become vulnerable to AMD again?
- New projects shouldn't detract from CVC core programs.
- Government resources are down,
- Partnering among orgs has been really helpful, but it's tough to maintain that because of insurance costs; An umbrella insurance policy for all of the orgs under one policy that we all contribute to would be a huge help;
- land management issues are a challenge

Opportunities (trends and needs) *Exploit and Expand!*

Growing Greener III?

New Governor

Intermodal consultant

Marcellus Shale funding

Act 13: watershed and recreation

There are many foundations CVC has never approached

Mainline Greenway Initiative

And other trends to network and connect trails

Threats (trends, changes, could inflict harm) *Avoid! Thwart!*

Declining government funding

Unstable government funding

High administrative requirements of government funding

Intermodal funding needs sophisticated applicant

Decline in foundation giving?

Remaining gaps in CVC trail network are difficult to accomplish

Strengths (can be used to perform) *Build and Enhance!*

Skilled and dedicated board

Skilled staff

Extensive volunteer involvement (data available)

Board is well connected to local government, other nonprofits

Organization is nimble, can respond to needs

Is forward thinking about maintenance when undertaking trail development

Is fiscally responsible

CVC “does a lot with a little” - avoids too much overhead and need to “feed the beast”

Board will do what it takes to get projects done; project-focused.

Endowment

Produces Annual Report past 3 years

Facebook 600-700 likes

Website is maintained by reliable board member, makes changes quickly

Can take online donations via PayPal

Successful Events: Triathlon, Sojourn, and member outings

Triathlon - new event that attracts younger constituency; done with West Penn Trail Council

Staff surveys event participants: Laura has results

Volunteers do intercept surveys on trail: Laura has results

CVC could ramp-up advocacy efforts

Weaknesses (prevent performance) *Resolve and Reduce!*

Geographic spread 1,887 square miles - difficult to hold member events

Communications are fragmented, both internal and external.

Fragmented public relations hurts fundraising

Too many people are unfamiliar with CVC

Need to raise CVC profile

Need to engage FB friends into the work of the organization: make them donors and volunteers

Need to engage Sojourn and Triathlon event participants into the organization: members, donors, volunteers.

Social media is under-utilized

Produces separate Stream Team Annual Report; rename to State of the Streams or something so Annual Report message isn't diluted.

Website needs overhaul, convert to Word Press

Need to be systematic and thorough when deciding whether to take on new projects; fully articulate pros, cons and costs of a potential project.

Project focus leaves operational tasks undone, or done piecemeal

Organization not cohesive

"Dual Mission" difficult to convey and for community to understand

Board's project focus leaves little time to be organizational ambassadors

Geographic spread - difficult to attract board members

Board is largely white, male, older; reflective of donor profile in Environmental Scan.

Need board succession plan

Need to find way to cover operating costs

Need to convey to stakeholders that trail development takes a long time.

Sustainability: human capital, board members, staff and volunteers

Sustainability: financial

Mission

Geographic spread: Kiski-Conemaugh River Basin. (Kiski-Conemaugh Watershed is technically accurate but lay people do not typically understand what a watershed is.) The Stream Team's footprint is articulated in the Stream Team's 2013 Annual Report.

Protect

Restore

Educate

Steward

Connect (trails)

Develop (trails)

Nature-based, land and water

Vision

High quality of life:

Clean water

Viable economy

Healthy people

Engaged citizenry (in stewardship of the river basin)

More residents

A visitor destination

Staycation

Recovered from past exploitation of natural resources

Group 1: How can CVC make good decisions about taking on new projects? (Jerry, Richard, Kris, Laura, Missy)

Does it align with Mission and Vision?

What's the outcome/impact?

What does it cost?

How much is needed to implement, manage and maintain?

Can someone else do the project better?

What resources are available to implement it?

- Administrative \$\$
- Volunteer support

Does the project contribute to CVC's financial stability?

How does the project raise the visibility of CVC?

What collaborative opportunities does it create?

What risks are associated with the project?

Group 2: How can CVC improve communication?

1. Combine our activities under one message with one comprehensive annual report and website. (Natural Biodiversity, Stream Team and Trails/Rec)
2. Produce regular e-newsletter; get data on "open rates" ; is informative and announces programs and resources; could do advocacy through the newsletter, eg Growing Greener III.
3. Develop message for outings
4. Push logo on items to make "brand" more visible. Make logo for all programs? Possibly work with graphic design student at University.
5. Story pitches (to news media)
6. Enhance social media
7. Optimize website (work with graphic design student at university)

Group 3: CVC Sustainability: Human Capital

Challenges:

- Aging board
- Lack of diversity: age, gender, ethnicity
- Would the CVC culture support hiring an Exec Dir? Where would the funding come from over time?

Plan:

Work with local universities, high schools, Boy Scouts and Girl Scouts - identify projects and stewardship activities, badges in the case of Scouts, recreation opportunities in the River Basin. Engage at that level then re-engage them. Engage their parents also. LEGACY WORK.

Create pool of people that could eventually lead to seat on BOD. Requires keeping database of people.

Group 4: CVC Sustainability: Financial

Board can take a role in Membership Dues, Donations, Sponsorships and Events. Staff needs to take lead on foundation and government grants, and government contracts.

Events include Triathlon, Sojourn and member outings. These are mission-based but also result in some income.

CVC has obtained a Games of Chance permit. Could present a good opportunity to raise unrestricted \$\$

Issues:

- How much do we need to raise? Need financial goals and good financial reports to see progress toward goals.
- Potential donors need to feel like they're getting something before they will make a donation; what is that?
- Are we asking the same people over and over?
- It is hard for the board to ask friends and acquaintances for money; need training and to build confidence.
- Need a plan; who will we ask? How much will we ask for?
- Need someone in charge to manage who is asking for what.

- Best to make the ask where projects are visible. (Small group says there are no projects in Ebensburg for example; yet later learn that the Stream Team is working there.)
- Need regular communication with donors.
- An annual phonathon might be a good idea, calling instead of emailing. And being together in a group could boost confidence.

Introductory comments by each retreat participant on hopes for the Strategic Planning process:

Focus

Focus

Trail resources

Seize all opportunities; can't create a new nonprofit every time there is an opportunity that will help the region

Anti-focus: we are overachievers and get more done than we should by being opportunistic.

No bike trail that can't be built; Strategic Plan is means to that end

Action focused, efficiency

CVC is umbrella, strong but malleable; strong core with branches; fuse Natural Biodiversity with strengths of CVC; need elevator speech; improve communication

See that capacity matches project commitments

Can we have a broad focus and still be effective

Work more cohesively. Focus. Smart Growth. Conservaton arm of CVC.

CVC raises maintenance funds. Sustainable trails.

(It is noted that SQI not represented, yet many CVC board members also sit on SQI board.)

CVC Mission and Vision Exercise

Mission Statement

- ✓ Who, Cause
- ✓ Verb, action: what we do
- ✓ Result, Impact, change, outcome

Current: Promoting the conservation and preservation of natural, cultural and historic resources and encouraging prudent land practices in the Kiski-Conemaugh by restoring and enhancing land and water based natural resources and promoting citizen and environmental stewardship through low impact recreation.

Options:

1. The CVC protects and restores the natural beauty of the Kiski-Conemaugh River Basin and strengthens connections between the people and the land.
2. The CVC is a citizen-based effort to protect, restore and showcase the Kiski-Conemaugh River Basin to enhance regional quality of life and economic development.
3. The CVC works to protect and restore the health and beauty of the Kiski-Conemaugh River Basin and to strengthen connections between the people and the land.
4. The CVC protects and enhances the Kiski-Conemaugh River Basin for the people of today and tomorrow.
5. _____

Language to draw upon (from board retreat):

Kiski-Conemaugh River Basin, protect, restore, educate, steward, connect, develop, nature-based, land and water

Quality of life, clean water, viable economy, healthy people, engaged citizenry in stewardship of the River Basin, attracts new residents and visitors, staycation, recovered from past exploitation of natural resources

We achieve this mission by:

- encouraging wise use and management of land and water natural resources in the Basin;
- providing opportunities for access to and enjoyment of these natural areas;

- promoting awareness and appreciation of environmental issues through education and stewardship so that the community can make sound choices for a sustainable, ecologically healthy future;

Vision Statement

A. Government, businesses, nonprofit organizations and community residents throughout the Kiski-Conemaugh river basin work together to manage the water and land resources for economic vitality and ecological health.

B. The Kiski-Conemaugh River Basin is a healthy ecosystem and an attractive natural resource that citizens protect and enjoy.

C. _____

Environmental Scan for:



Conemaugh Valley Conservancy

Submitted by:

Scott B. Leff, Senior Consultant for Organizational Development
& Strategy

Bayer Center for Nonprofit Management at
Robert Morris University

Heinz 57 Center

339 Sixth Avenue, Suite 750

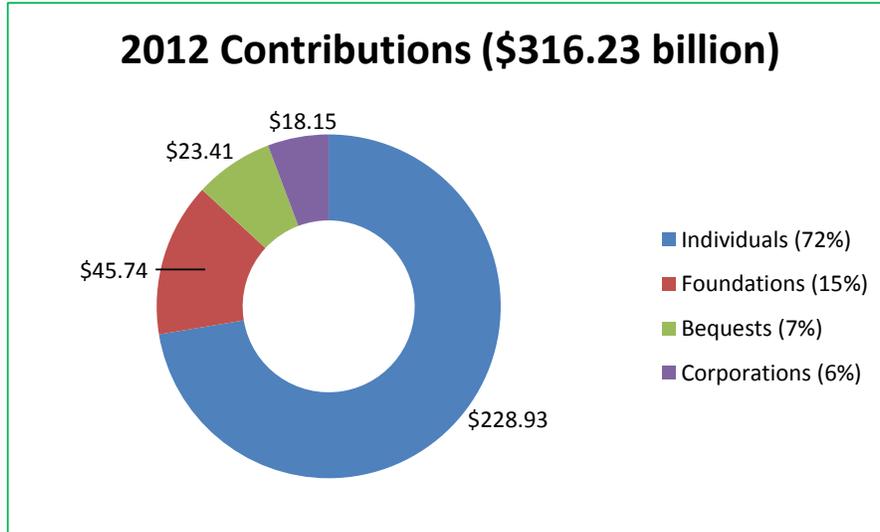
Pittsburgh, PA 15222

412/397-6006



I. PHILANTHROPY

GIVING IN THE UNITED STATES



Source: *Giving USA*

WHO GIVES?

Higher levels of charitable giving are positively associated with higher income, higher wealth, greater religious participation, volunteerism, age, marriage, higher educational attainments, U.S. citizenship, a higher proportion of earned wealth versus inherited wealth and a greater level of financial security.¹

RELIGION AS A MOTIVATION TO GIVE

- Average contribution of those who belong to a religious organization was more than twice that of households with no religious affiliation².

VOLUNTEERISM

- Those who volunteer give twice the percentage of income to charity as those who do not: 2.5% versus 1.2%.³

¹ Havens, J.J., O’Herlihy, M.A., Schervish, P.G. (2006). *The Non-Profit Sector: A Research Handbook*. Boston: MA. Yale Press.

² Ibid.

³ Ibid.

AGE

- Charitable giving is found to increase with age up to approximately 65, at which point there is a drop in the dollar amount of annual charitable giving.⁴

MARITAL STATUS

- Married couples have higher participation in charitable giving than do single, divorced, and separated households (92.5% to 82.2-87.5%). Married couples also have a higher average household contribution (\$2,299 versus \$887-\$1,246).⁵
- Single women – especially single mothers – are far more generous than single men. (10% vs. 2% of discretionary income for those who earn more than \$50,000 annually⁶).

EDUCATIONAL ATTAINMENT

- For households with less than a high school education, 68% give to charity; this increases to 86% for households with high school education and 95% for households where the respondent is a college graduate.⁷

RACE

- Caucasians are more likely to give to charity (90.3%) compared to African-Americans (80.6%), Hispanics (85.2%), and other racial/ethnic groups (77.6 %).⁸ When African-Americans do give, they give 25% more of their discretionary income than do Caucasians (\$528 vs. \$462).⁹
- Church is an essential part of African-American giving. Nine dollars out of every \$10 donated by African-Americans goes to church/religious institutions vs. \$7.50 out of every \$10 for Caucasians.¹⁰

EMPLOYMENT

- The percentage of households contributing to charity is higher if the respondent is employed than if not employed (90% versus 86%).¹¹
- As a percentage of household income, unemployed households contribute more than employed households (3.2% versus 2.5%).¹²

⁴ Ibid.

⁵ Ibid.

⁶ Anft, M. (2003, May 1). How Americans Give. *The Chronicle of Philanthropy*. Special Report.

⁷ Havens, J.J., O’Herlihy, M.A., Schervish, P.G. (2006). *The Non-Profit Sector: A Research Handbook*. Boston: MA. Yale Press.

⁸ Ibid.

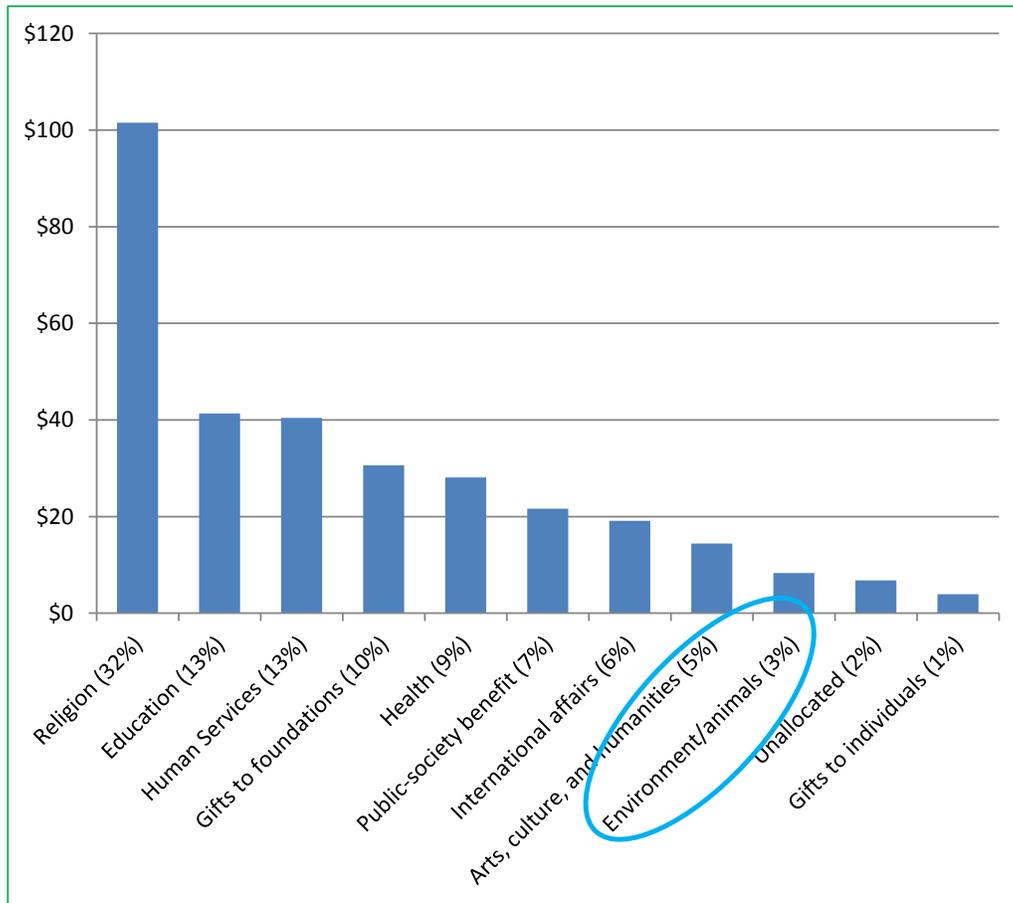
⁹ Anft, M. (2003, May 1). How Americans Give. *The Chronicle of Philanthropy*. Special Report.

¹⁰ Ibid.

¹¹ Havens, J.J., O’Herlihy, M.A., Schervish, P.G. (2006). *The Non-Profit Sector: A Research Handbook*. Boston: MA. Yale Press.

¹² Ibid.

CONTRIBUTIONS BY NONPROFIT SUBSECTOR



Source: *Giving USA*

Of the approximately \$316 billion in total philanthropy in 2012, religious organizations received the highest proportion at 32%.¹³ Giving to the education subsector was next at 13%.¹⁴ The environment and animal subsector received the smallest amount of contributed funds among the major nonprofit subsectors with 3%; however, this still equaled nearly \$8 billion.¹⁵ It is worth noting that giving to the environment/animals subsector has been fairly stable at around 3% of total U.S. philanthropy since 1995.

¹³ *Giving USA Estimates, Giving USA 2013.*

¹⁴ *Ibid.*

¹⁵ *Ibid.*

WHO GIVES TO THE ENVIRONMENT?

A study in which 800-1,000 randomly selected U.S. residents were telephone interviewed confirmed previous findings which suggest that environmental supporters are most likely to be middle-aged, male, Caucasian and affluent.

AGE

- In the 1970s, the majority of supporters of environmental protection (70 percent) were 18-24 years of age. Support decreased with age, until it was only 31 percent among those ≥ 65 years of age.¹⁶ Today, the youth of the 1970s and 1980s, who are now 50+ years old, are more supportive of environmental causes than current 18 to 29-year-olds.¹⁷

GENDER

- With more than 60 percent of U.S. women in the labor force, women are increasingly concerned about the economy and jobs. This transition in priorities means that men are slightly more supportive of environmental protection.¹⁸

RACE

- Caucasian Americans tend to be stronger supporters of environmental protection than other groups.¹⁹

NET WORTH

- Literature has shown that those with higher incomes are more likely to be supportive of environmental protection.²⁰

¹⁶ Mitchell R.C. (1978). The public speaks again: A new environmental survey. *Resources* 60 (September-November): 1-6.

¹⁷ Greenberg, M.R. (2004). Is public support for environmental protection decreasing? An analysis of U.S. and New Jersey data. *Environmental Health Perspectives*, 112(2), Retrieved from <http://ehp03.niehs.nih.gov/home.action>

¹⁸ Ibid.

¹⁹ Van Liere K, Dunlap R. (1980). The social basis of environmental concern: a review of hypotheses, explanations, and empirical evidence. *Public Opinion Q* 44: 181-197

²⁰ Ibid.

II. PENNSYLVANIA FUNDING CLIMATE

According to PA Environment Digest,²¹ as of the 2012-2013 budget, Pennsylvania had cut \$1.7 billion from environmental protection and restoration programs over 10 years. These cuts included:

- \$533 million in Act 339 grants intended to support wastewater plant operations
- \$79 million from the DEP and DCNR General Fund budget during FY2009-10
- \$52.7 million “one-time” diversion from the Keystone Recreation, Parks and Conservation Fund
- \$50 million in 2007 and 2008 from the Environmental Stewardship Fund, which supports mine reclamation and watershed restoration
- FY 2012-13 budget continuation of the \$102.8 million cut made by Gov. Rendell beginning in FY 2010-11
- \$669,000 from the Safe Water line item in DEP's budget

In addition, according to the same source, DEP staffing has been reduced from 3,211 in FY 2002-03 to 2,759 in FY 2012-23 (14% reduction), and DCNR staffing from 1,391 in FY 2002-03 to 1,375 in 2012-13. These reductions occurred simultaneously with the exponential growth and need for permitting and oversight of Marcellus Shale exploration and drilling.

GROWING GREENER

Growing Greener I was established in 1999 when Governor Tom Ridge and the General Assembly committed nearly \$650 million over five years to fund conservation and environmental protection projects – from the creation of greenways, trails and community parks to wildlife habitat preservation. In 2002, Governor Richard Schweiker and the General Assembly created a dedicated source of funding for Growing Greener through an increase in the tipping fee – the fee for dumping trash in landfills. The revenue generated by this increase was placed into the Environmental Stewardship Fund for Growing Greener. As a result of these Growing Greener initiatives, watershed associations exploded across the Commonwealth as agencies to convert Growing Greener funding into on-the-ground projects. However, Growing Greener did not provide for any additional funding to sustain these organizations or maintain the projects they implemented.

In 2005, voters approved Growing Greener II, a \$625 million bond to supplement existing Growing Greener funds, with 61 percent support

²¹ <http://www.paenvironmentdigest.com/newsletter/default.asp?NewsletterArticleID=22752>

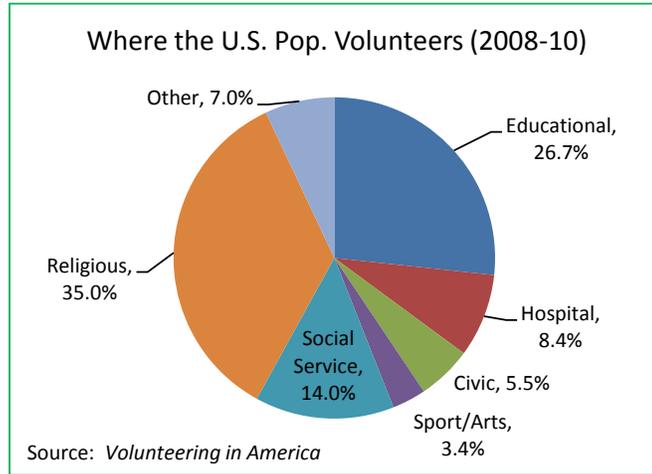
statewide. Support was even higher in Southeastern Pennsylvania, with 76 percent voter approval.

Over the years, Growing Greener has provided funds to communities and nonprofit organizations to help restore and protect local watersheds, clean up abandoned mines, preserve and acquire farmlands and open spaces, and lessen non-point source pollution from entering waterways. Growing Greener also provides funds for maintaining our award-winning state park system, for heritage conservation, and for the development of multipurpose trails, greenways and parks in our communities. Growing Greener accomplishments include:

- Protecting more than 33,700 acres of Pennsylvania's family farmland
- Conserving more than 42,300 acres of threatened open space
- Protecting and improving the health and stability of hundreds of miles of streams, streambanks, and wetlands
- Improving public recreation through 234 community park projects
- Restoring more than 1,600 acres of abandoned mine lands
- Plugging over 2,100 abandoned gas wells

Today, Growing Greener struggles for funding with Growing Greener II bond funds depleted and a majority of the Growing Greener Environmental Stewardship Fund tipping fees being diverted to pay the debt service on the Growing Greener II bond.

III. VOLUNTEERS



In 2010, 62.8 million Americans volunteered, or 26.3% of the U.S. adult population. While the number of volunteers has steadily climbed from the recent low of 2007 (60.8 million), the percentage of Americans donating their time has been constant at 26% of the adult population.²²

The significant change that has occurred is how Americans are allocating their volunteer time. In 1989, 21% of the American population volunteered in support of civic and/or sports/arts-related causes. That has since dropped to less than 9% from 2008-2010.²³

The number of Americans volunteering their time in support of educational and social service causes, on the other hand, has increased from 25% to slightly less than 41% over almost two decades (1989 - 2010).²⁴

Religious causes still attract more than one-third of U.S. volunteers and remain the top focus of volunteer support.²⁵

²² The Corporation for National and Community Service (August 9, 2011). Volunteering in the U.S. Retrieved from <http://www.volunteeringinamerica.gov/national>

²³ The Corporation for National and Community Service (August 9, 2011). Volunteering in the U.S. Retrieved from http://www.volunteeringinamerica.gov/webprofile.cfm?show_images=1&show_results=1&years=&graph_per_page=6&palette=rgb&graphics=0,0,0,0,94,88&type=2

²⁴ Ibid.

²⁵ Ibid.

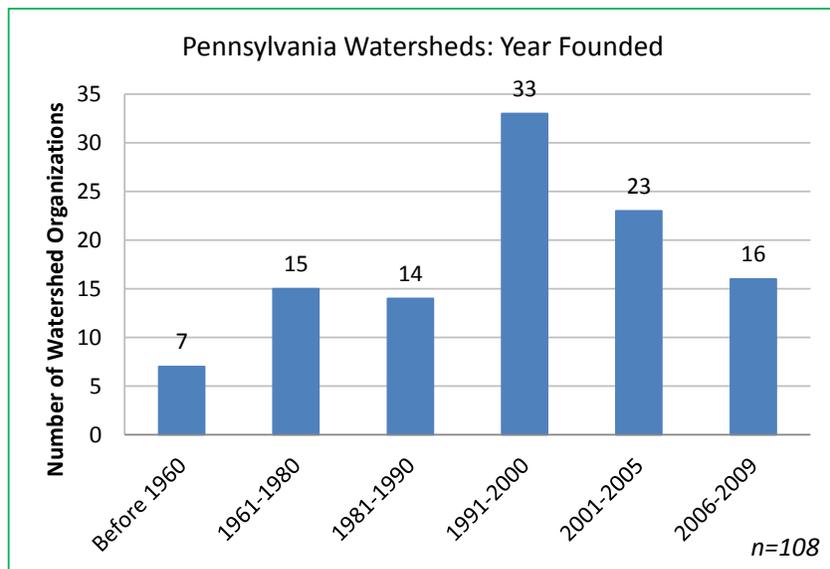
IV. PENNSYLVANIA WATERSHED ASSOCIATIONS: BAYER CENTER SURVEY RESULTS

INTRODUCTION

In late 2009, the Bayer Center sent out a survey to 200 watershed organizations located in Pennsylvania. The survey asked a number of organizational assessment questions, as well as questions unique to watershed organizations (e.g., projects completed, consistent funding sources, etc.).

The response rate to the Bayer Center survey was high. In total, 108 watershed organizations responded (54% of all surveyed organizations). These 108 organizations comprised roughly 1/3 of the watershed groups working in Pennsylvania at the time.

YEAR FOUNDED

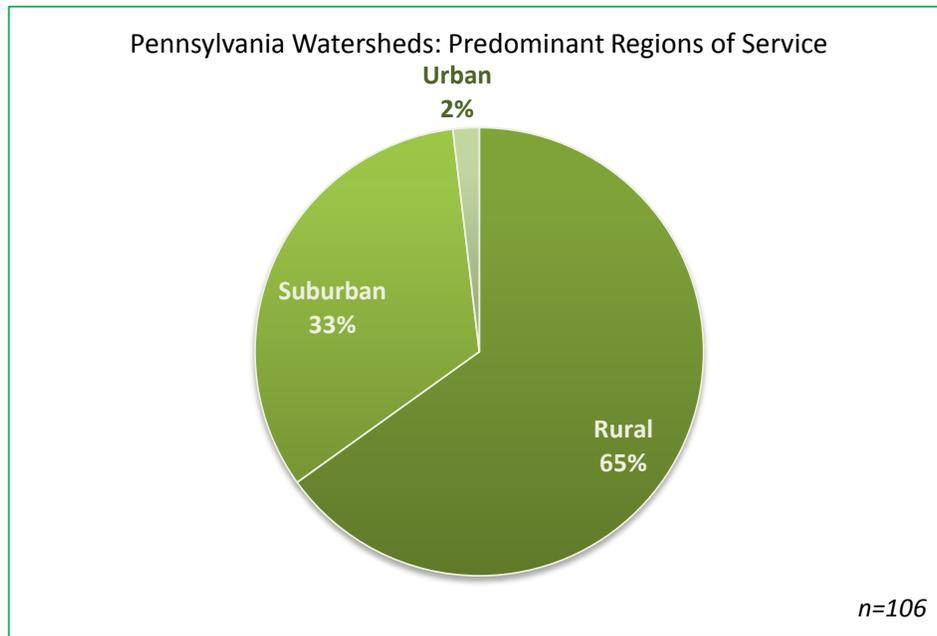


Pennsylvania has witnessed strong growth in the number of watershed groups over the last nine years, according to the survey. Of the 108 watershed organizations surveyed, 36% (39 organizations) were founded since 2001. Much of this growth can be attributed to the population's awareness of environmental issues and, on a more local level, the state's Growing Greener Program.

INCORPORATION STATUS

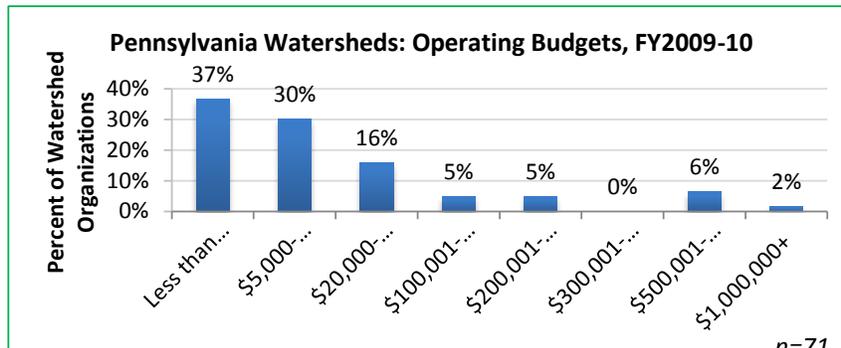
The majority of surveyed watershed groups are incorporated as 501(c)(3) nonprofits. 70% of the surveyed watershed groups reported that they had received their 501(c)(3) certification, while another 15% had incorporated at the state level or were in the process of incorporation.

REGIONS OF SERVICE



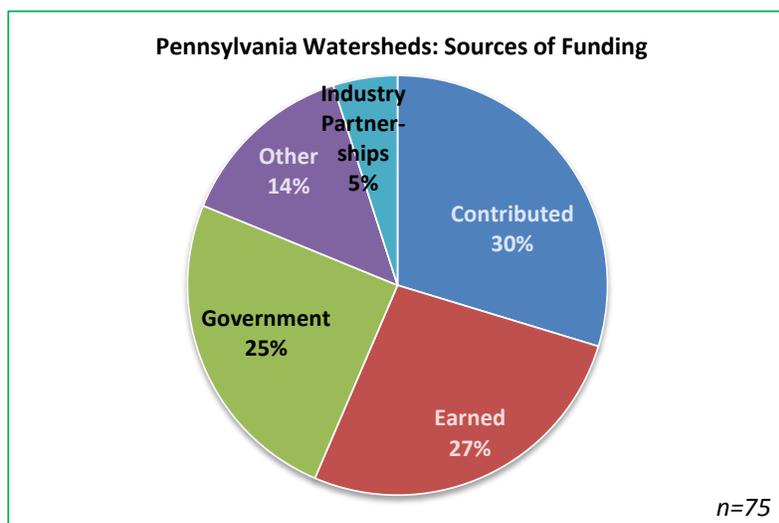
Not surprisingly, most watershed organizations service rural communities (65%) and do their work where few people live. This poses membership challenges for watershed groups in sparsely populated areas.

OPERATING BUDGET



The vast majority of Pennsylvania watershed groups operate with very lean budgets, even by nonprofit standards. While nearly one out of two registered nonprofits in the United States reports total revenue of less than \$100,000 (45% of all registered nonprofits), a staggering four out of five surveyed watershed organizations in Pennsylvania (83%) reported operating budgets of less than \$100,000 (total revenues), and fully two-thirds had budgets under \$20,000. The majority of surveyed watershed groups in Pennsylvania have fewer financial resources available than the typical nonprofit and face questions of survival.

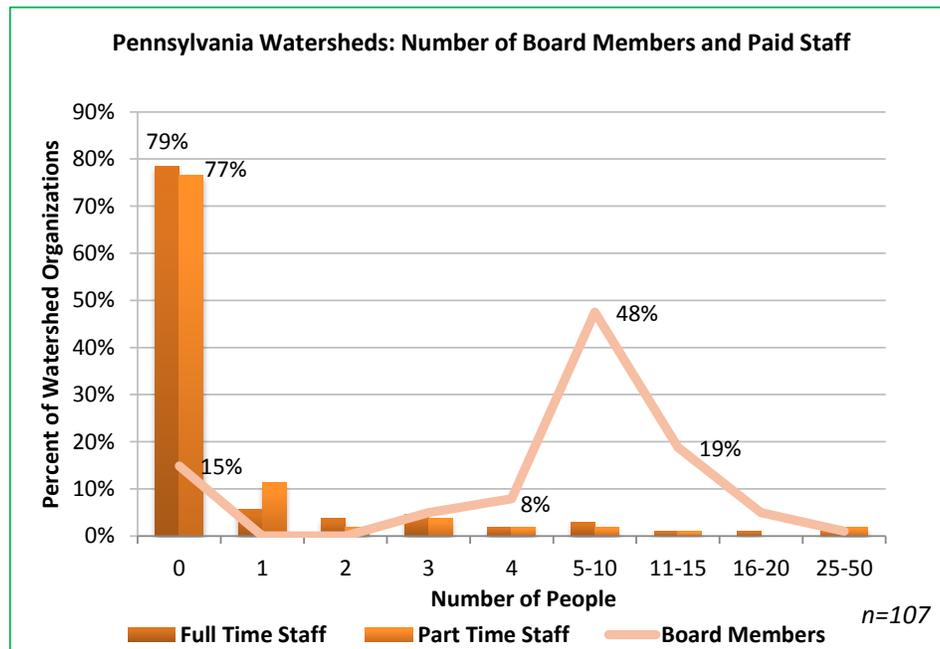
SOURCES OF FUNDING



Watershed survey respondents receive support primarily from three sources: contributed income, earned income and government sources. Of these, the largest is contributed income – foundation support (11%) and individual donors (19%). Earned income was the second most common answer, with more than one-quarter of respondent organizations receiving

income from membership dues (16%), special events (8%) and/or sales of goods or services (3%). One-quarter of respondents said their organization receives funding from the Department of Environmental Protection (23%) and/or Department of Conservation and Natural Resources (2%). With state budget cuts to these government agencies threatening survival of individual associations, a number of watershed organizations with budgets under \$100,000 will be forced to come up with new methods to earn income which could detract from the organization’s primary focus – environmental mission. Nonprofit practitioners refer to this scenario as “mission creep” – a term applied to an organization that institutes a program or service that deviates from the core mission in order to generate revenues.

BOARD MEMBERS, PAID STAFF AND CONSULTANTS



The overwhelming majority of watershed organizations surveyed have no paid staff (77/79%) and 4-15 board members (75%). As a result, there is heavy reliance on third-party consultants. According to the survey results, within the last three years:

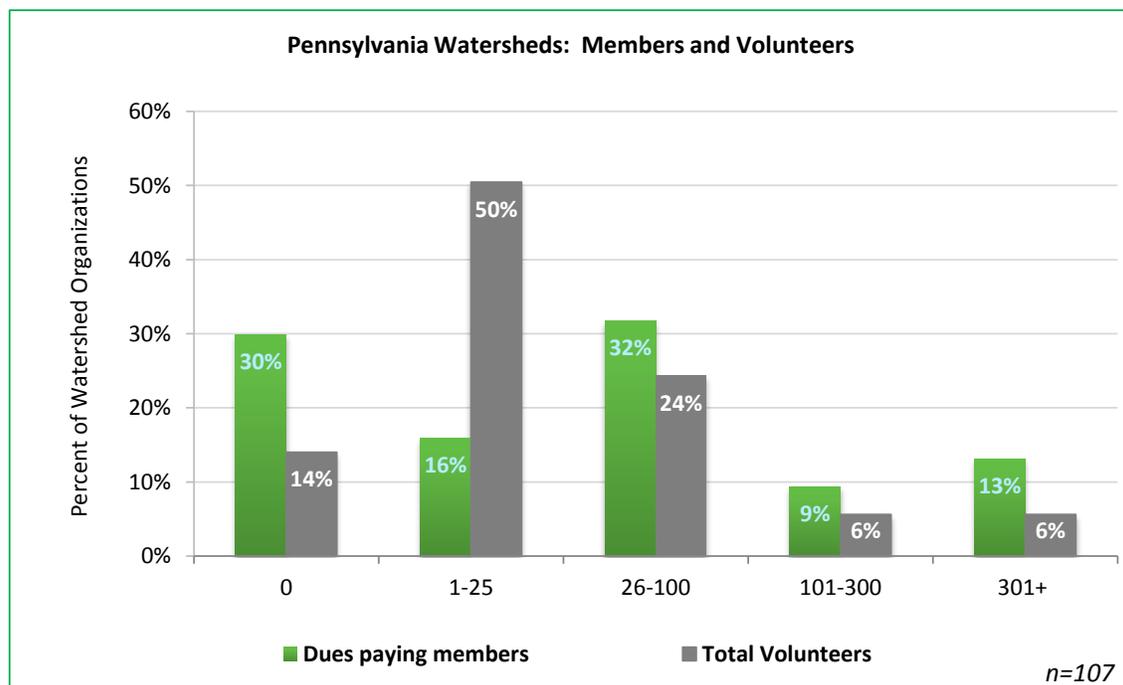
- Over half of the watershed groups (59%) reported using at least one technical consultant
- One-third of the groups (33%) reported using at least one Pennsylvania Conservation District Watershed Specialist

- One-in-four (25%) have engaged an organizational consultant, such as the Bayer Center

Watershed groups also depend on board members to carry out traditional staff functions in addition to performing their board responsibilities. It should be noted that watershed board members are not your average nonprofit board members. Watershed board members tend to be exceptionally engaged and passionate about serving the mission of their organizations – the environment.

Though board continuity is a strong point for these organizations, it can also be regarded as a weakness. Nowhere is this more true than with the Board Chair position. Nearly half (48%) of all watershed respondents' Board Chairs have occupied their position for 3 or more years, and over one-quarter (26%) of these organizations have had the same Board Chair for six or more years. To put this into context, the average Board Chair of a registered nonprofit in the United States serves a term of 3 years, according to BoardSource, a recognized thought leader in the nonprofit sector. This raises a host of questions about the need for succession planning to help pave the way for tomorrow's leaders, as well as ensure organizational stability.

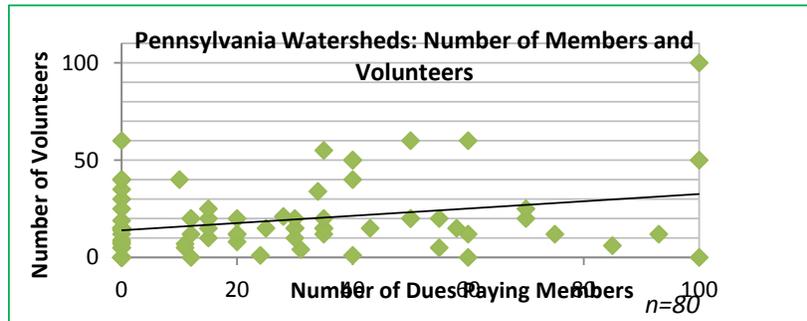
MEMBERSHIP AND VOLUNTEERS



The surveyed watershed groups have more dues paying members than volunteers. According to the survey results, 54% of watershed organizations have 26 or more dues paying members, while only 36% have 26 or more volunteers.

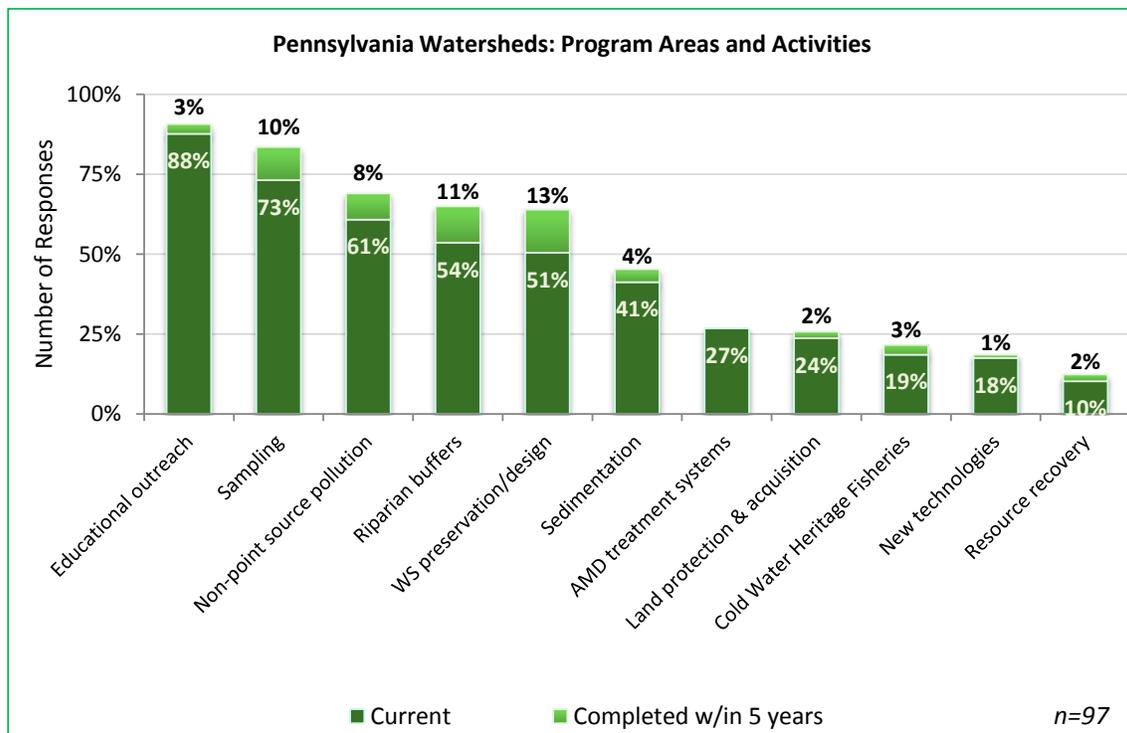
The median surveyed watershed organization has 30 dues paying members and 19 volunteers.

DO MEMBERS TRANSLATE INTO VOLUNTEERS?



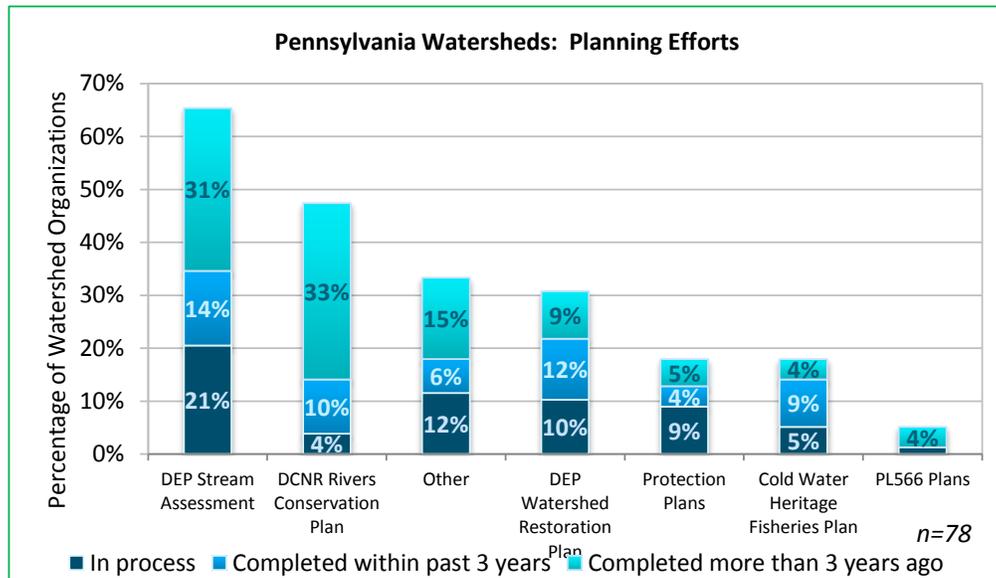
There does not appear to be any significant relationship between the number of dues paying members a watershed group has and the size of its volunteer force.

PROGRAM AREAS AND ACTIVITIES



The programs and activities of watershed organizations are nearly as varied as the geographies they serve. The most common program offered by watershed groups is educational outreach at 88%. In addition, more than half are involved in sampling, non-point source pollution, riparian buffer projects and/or watershed preservation/design.

PLANNING



Watershed groups are actively involved in developing plans to document the environmental needs to be addressed in their areas. Two-thirds of the survey's watershed groups are either working on (21%) or have completed (45%) a Stream Assessment Plan. The next most common plan is the Rivers Conservation Plan (43%). One out of five surveyed organizations is working on either a Watershed Restoration Plan (10%) or a Protection Plan (9%).

ORGANIZATIONAL ASSESSMENT TOOL (OAT)

Date: 1/24/14

Name: Conemaugh Valley Conservancy

Title:

Agency Name:

Address:

Telephone:

Fax :

Email:

Web site:

www.conemaughvalleyconservancy.org

Our agency's Tax ID/EIN # is:

Our agency's annual budget is \$300,000 (not including SQI) for fiscal year ending

Our agency has: Full Time Employees on payroll 1 (Missy)

Part Time Employees on payroll 1 (NB); 2 (ST); Jack McGuire,

Engineer; Laura (bookkeeper)

Executive Director:

Executive Director Phone #:

Executive Director Email Address:

Board President:

Board President Phone #:

Board President Email Address:

I. How Our Agency Is Organized

A. Legal and Ethical Considerations

- | Y | N | P | |
|-------------------------------------|--------------------------|-------------------------------------|--|
| <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | We operate under board-approved bylaws. (old) |
| <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | We operate under a current 501(c)(3) designation. [REDACTED] |
| <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | We have Directors & Officers Errors & Omissions Insurance. (\$1 million) |
| <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | We comply with our state's Charitable Solicitation Act. |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | We comply with the provisions of the US Patriot Act. [REDACTED] |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Any required licensing is current. It is as follows: [REDACTED] |
| <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | Our bylaws are reviewed and amended periodically. Last review: |
| <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Our bylaws define our board, committee, staff roles including position descriptions and areas of responsibilities for board officers and board committees. |

B. Board Governance (1 non-participating member; "He won't be renominated.")

- | Y | N | P | |
|-------------------------------------|-------------------------------------|-------------------------------------|--|
| <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Our board members assume responsibility for the organization's structure and functions, including fiduciary, legal, policy making, planning, hiring and reviewing responsibilities. [REDACTED] |
| <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | All of our board members serve without compensation and with an awareness of the conflict of interest policy and the need for compliance. |
| <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Our board meetings are conducted according to our bylaws (number of meetings, voting quorum, notifications). |
| <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | We keep written minutes of each board meeting. |
| <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | We have a process to identify and recruit new board members. |
| <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | New board members receive a formal orientation to learn about our agency. |
| <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | Our bylaws provide for officer and chairperson term limits. |
| <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | Our bylaws provide for rotation from the board. |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Our board reviews our Executive Director annually. The review is based on meeting goals and objectives of our organization and is documented. |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Each of our board members makes a financial contribution to our organization. |
| <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | Our board meets annually to review, and as needed, update our strategic priorities. |
| <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Our board composition is diverse and represents our constituency and our region. |
| <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | We have a board succession plan in place. |

II. How We Plan for Our Future

A. Mission and Vision

- | Y | N | P | |
|-------------------------------------|-------------------------------------|--------------------------|---|
| <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | We have a mission statement that accurately reflects and guides our organization. |
| <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Our mission is routinely shared with our stakeholders. |
| <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | We have a vision statement that is shared. |

B. Planning

Y N P

- x We have a current strategic plan in place (3-5 year plan). Our plan covers the following years.
- x Our agency reviews and updates our strategic operating plan annually.
- x Our agency annually sets goals and objectives according to our strategic plan.
- x We formally review our agency's performance against the strategic plan as well as the goals and objectives we establish.
- We include our stakeholders in our planning processes.

III. How We Serve and Relate to Our Clients

A. Program Goals and Performance

Y N P

- x Our agency reviews programs regularly to assure stated outcomes are achievable. (Committees)
- x Our board sets overall program priorities based upon our strategic plan and with staff and stakeholder input.

B. Program Evaluation

Y N P

- x Our agency reviews programs regularly to ensure stated outcomes are achieved through a recognized system of evaluation.
- x We maintain current files and statistics on each program.
- We have systems in place for our clients and staff to evaluate our programs.
- We maintain current files and statistics on each client.
- x We track information that impacts our community and clients positively and negatively.

C. How We Relate to Our Clients (N/A)

Y N P

- We use client feedback in designing and modifying our programs and services.
- We have processes in place to handle and resolve client complaints.
- The diversity of our staff reflects our target population and our community.
- Our facilities and services are accessible to our target populations needs (hours, fees, and physical accessibility).
- Our facilities are tailored to meet cultural and linguistic needs of our clients.

IV. How We Operate (N/A)

A. Our Facilities

Y N P

- Our facilities meet required safety and health regulations.
- Our facilities are inspected at least annually. Recommendations for corrections are documented and addressed.

Our facilities comply with applicable ADA regulations and requirements.

B. Insurance and Liability Coverage

Y N P

- We carry appropriate levels of insurance to cover our facilities, clients, employees, and volunteers.
- Individuals who have financial responsibilities in our organization are bonded.
- We review our insurance coverage and costs annually.

C. Management Information Systems (N/A)

Y N P

- Our organization's confidential electronic information/files are secure.
- Our agency has a board that supports the effective use of MIS technology.
- We have a 1-3 year technology plan in place that is monitored by a board technology committee.
- We have an internet communication strategy and policy in place.
- Our job descriptions list needed technology skills.
- We are in compliance with Section 508 for people with disabilities, if applicable.

D. Accreditations (N/A)

Y N P

- Our agency seeks relevant accreditations to enhance the value of our organization.
- We are currently accredited by (please indicate):
- Our accreditation expires (please indicate):

V. How Our Human Resources Are Managed

A. Recruiting and Hiring (N/A)

Y N P

- Our recruiting policies and procedures comply with local, state and federal employee law.
- A qualified professional periodically reviews our recruiting and hiring policies and procedures.
- Our supervisors receive training in interviewing skills, hiring policies and procedures, and in getting and giving references.

B. Training and Orientation (Note: Volunteers tend to express interest in work areas like train maintenance, then not show up)

Y N P

- We provide appropriate training to new employees so that they can be successful in their roles.
- We provide new employees with materials and information about our organization, mission, programs, policies and procedures.
- We provide training and materials to our volunteers so they can be successful in their work. (Missy does for ST)
- Training goals are reviewed and acted upon on an annual basis for each employee.

C. Administration

- | Y | N | P |
|-------------------------------------|-------------------------------------|-------------------------------------|
| <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
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| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
- Our salary and benefits policies comply with local, state, & federal law. (Missy's salary is based on her fundraising, with performance bonuses; no benefits)
 - Our Executive Director's (Missy's) salary and benefit package is reviewed annually and shared with the entire board.
 - We have a current board-approved employee handbook for all of our employees. (Just a bare bones personnel policy from 2007)
 - Our volunteers receive a volunteer handbook. (ST)
 - We offer competitive salaries and benefits based on local agency salary levels.
 - Our board conducts a periodic review of the compensation program.
 - Our salary structure ensures similar pay for similar work.
 - Our employees receive an annual salary and performance review.
 - We are committed to providing opportunities for employee advancement.
 - Our board annually oversees our human resource policies and makes recommendations.
 - Current job descriptions, qualifications, responsibilities, and accountabilities are provided to our employees. (Missy, 2007)
 - We have position descriptions in place for our volunteers. (ST; WPT officers)
 - We review our employee rate of turnover regularly.
 - Our employees have the opportunity for input into performance goals.

D. Evaluation

- | Y | N | P |
|--------------------------|-------------------------------------|--------------------------|
| <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
- We have a system in place to evaluate and document our employee performance.
 - Employee reviews include review of mutually agreed upon goals.
 - Our agency has a written disciplinary procedure.
 - Our grievance policy requires our agency to respond to any employee grievance promptly and in writing.
 - We review and evaluate our volunteers' performance and offer feedback. (Missy informally does Quality Control on stream samples)

D. Property/Asset/Pension Management

- | Y | N | P |
|-------------------------------------|--------------------------|--------------------------|
| <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
- All agency assets (mortgages, deeds, leases, insurance, equipment, etc.) are in the name of our agency.
-
- | Y | N | P |
|--------------------------|--------------------------|--------------------------|
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
- We follow a board approved investment policy.

E. Financial Resource Development

- | Y | N | P |
|-------------------------------------|--------------------------|--------------------------|
| <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
- Our fundraising complies with local, state, and federal guidelines and regulations.
-
- | Y | N | P |
|--------------------------|--------------------------|-------------------------------------|
| <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> |
- Our agency acknowledges all donations – cash or other – in writing to the donor. (Not always for in-kind)
-
- | Y | N | P |
|-------------------------------------|--------------------------|--------------------------|
| <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
- We have a fund raising plan in place.
-
- | Y | N | P |
|--------------------------|--------------------------|--------------------------|
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
- Our fund raising plan supports our strategic plan, goals and objectives.
-
- | Y | N | P |
|-------------------------------------|--------------------------|--------------------------|
| <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
- Our agency researches funding possibilities on a regular basis.
-
- | Y | N | P |
|-------------------------------------|--------------------------|--------------------------|
| <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
- Our agency has a diverse base for funding its programs and operations.

VII. How We Let People Know about Us

A. Community Needs

- | Y | N | P |
|--------------------------|--------------------------|--------------------------|
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
- Through research and feedback, including suggestions from community groups, service agencies, advocacy groups and users, we know the needs of our target populations.
-
- | Y | N | P |
|--------------------------|--------------------------|--------------------------|
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
- Our program materials and publicity reflect how our services address the needs of the target population.
-
- | Y | N | P |
|-------------------------------------|--------------------------|--------------------------|
| <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
- Written materials can be easily understood by our target population.
-
- | Y | N | P |
|--------------------------|--------------------------|--------------------------|
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
- We check and update our agency listing on United Way's Helpconnections website annually.

B. Marketing and Public Relations

- | Y | N | P |
|--------------------------|-------------------------------------|--------------------------|
| <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
- We have a strategic marketing plan that supports our strategic plan and is designed to let our publics know about our organization, its mission, goals, programs, and services.
-
- | Y | N | P |
|--------------------------|-------------------------------------|--------------------------|
| <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
- We have a crisis communication plan in place. (This is a risk, especially since we run the Sojourn)
-
- | Y | N | P |
|-------------------------------------|--------------------------|--------------------------|
| <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
- We have materials that inform our constituents about our organization and our various programs.

C. Collaborations

- | Y | N | P |
|--------------------------|--------------------------|--------------------------|
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
- Our organization recognizes the growing importance of collaborations, and we explore opportunities to collaborate with other agencies.
-
- | Y | N | P |
|-------------------------------------|--------------------------|--------------------------|
| <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
- We are currently involved in the following collaborations: (Ben's Creek Canoe; Lift Johnstown; CCRA; Shade Creek Watershed Association; LORBA; JAHA; Allegheny Ridge; Trails Operating Group; Rails to Trails Conservancy; several municipalities;

Corps of Engineers; DCNR; watershed associations; Conservation Districts; BAMR;
DEP; WPC; Laurel Highlands Visitors Bureau)

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