



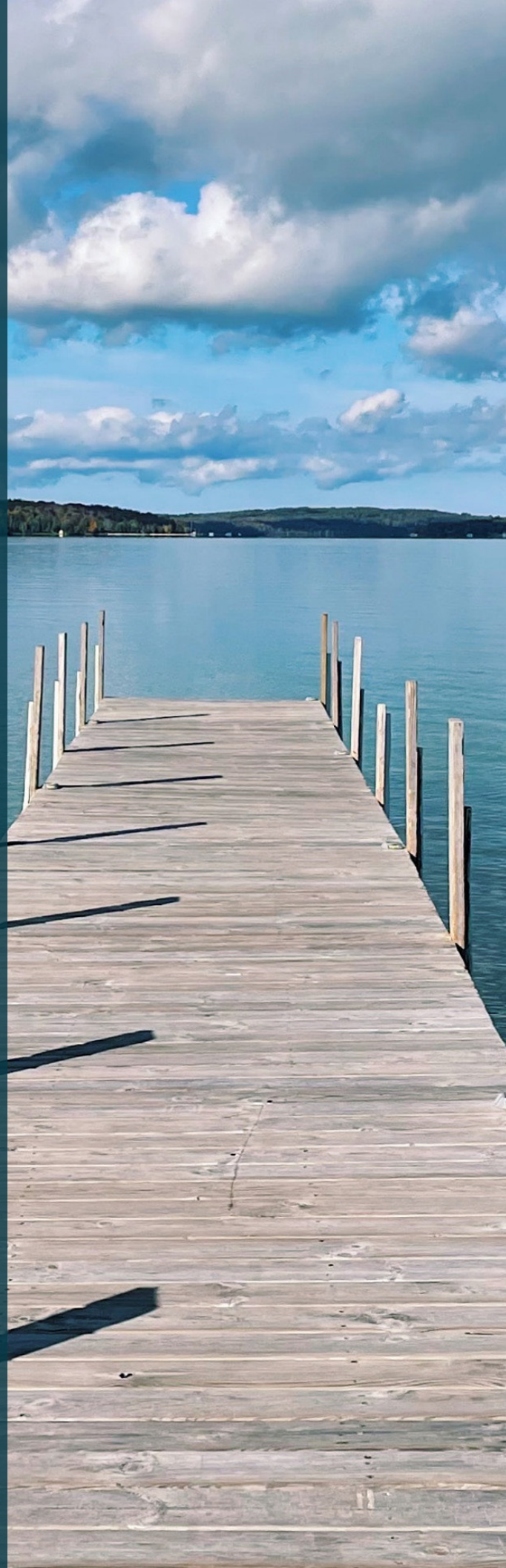
WALLOON
LAKE
ASSOCIATION AND
CONSERVANCY

2023 - 2027 STRATEGIC PLAN

Adopted by the Board of Trustees: 12/16/2022

Revised by the Board of Trustees: 4/24/2026

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STRATEGIC PLAN OVERVIEW



MISSION

To deliver Walloon Lake, a place where people and nature thrive, to the next generations through the power of conservation.

VISION

Through its efforts in preserving the quality and natural state of the Walloon Lake watershed, the WLAC inspires the surrounding communities to come together to further protect the land and water of Walloon Lake. We envision a future when Walloon Lake and its watershed maintain the highest standard in water quality, the surrounding land and wildlife is preserved, and all of this is enjoyed by the greater community.

The WLAC is committed to expanding its education programs to provide pertinent information regarding land conservation strategies, responsible shoreline practices, environmental threats, outdoor recreational safety and more. WLAC is a steward to encourage and educate people to enjoy and interact with nature responsibly to ensure its survival for generations to come.

CORE VALUES

NOW AND FOREVER:

We understand that the future of Walloon is in our hands. As caretakers of the Walloon Lake watershed, it is our responsibility to ensure that it remains a special place and incredible resource for future generations.

PRESERVATION:

We acknowledge the need to maintain the highest level of conservation standards to protect the watershed in its entirety and to preserve Walloon's history in response to growing development pressures and generational turnover.

FAMILY:

Walloon Lake holds precious family memories, a shared heritage and provides a place to bond, relax, appreciate nature and be grateful for the bounty of our planet.

EDUCATION:

To best serve our mission, we must listen, learn and provide the educational tools and resources needed to build awareness, increase trust and inspire action.

COMMUNITY:

Our community is comprised of diverse environments and people united around our common interests in Walloon Lake and its watershed.

THOUGHT AND ACTION LEADERSHIP:

We are leaders among environmental and conservation organizations, both in thought and action, with the ambition and mindset to do more and better.

STRATEGIC FOCUS AREAS



1 WATER STEWARDSHIP

WLAC will continue to advance clean water initiatives and maintain healthy ecosystems in Walloon Lake and its watershed through responsible water stewardship programs.

2 LAND CONSERVATION AND ACCESS

WLAC will actively pursue land protection projects that possess high conservation value while ensuring that its conserved lands are managed to the highest standards.

3 COMMUNITY ENGAGEMENT AND EDUCATION

WLAC will foster a culture of conservation by engaging a diverse community of people who live, work and play on Walloon Lake and in its watershed.

4 POLICY, PARTNERSHIPS, AND ADVOCACY

WLAC will coordinate with government agencies, businesses, and other nonprofit organizations to support responsible policies, partnerships, and practices that protect Walloon Lake and its watershed.

5 ORGANIZATIONAL SUSTAINABILITY AND PHILANTHROPY

WLAC will ensure the Walloon Lake watershed community understands, supports, and invests in the WLAC's long-term success and the organization will be managed as a streamlined, highly effective, and responsive nonprofit organization

GOALS AND OBJECTIVES

In WLAC's 2023-2027 Strategic Plan, 19 goals are described alongside 72 objectives in alignment with WLAC's five strategic focus areas. Goals are broad and general. They are preceded by a number for clarity. Objectives are specific and measurable. They are preceded by a letter.

WATER STEWARDSHIP

FOCUS AREA

1 DESIGN AND IMPLEMENT ENVIRONMENTAL PROTECTION CAMPAIGNS

- A Develop new recommendations for depth and distance from shoreline for wake sport activities on Walloon Lake
- B Develop a new brochure, an updated map, one article in the Wallooner, one article on the WLAC website, and three posts on social media to educate the public about the updated recommendations for wake sport activities on Walloon Lake

2 INCREASE PUBLIC EDUCATION ON CURRENT WATER QUALITY MONITORING PROGRAMS

- A Establish one model shoreline on Walloon Lake for educational purposes
- B Host three stream monitoring volunteer outings on Fineout Creek and Schoof's Creek per year
- C Conduct water quality monitoring activities on Walloon Lake at least 10 times per year
- D Analyze data from Walloon Lake water quality outings and interpret the impacts of changes over time to the public through WLAC publications at least once per year
- E Execute one sustainable shoreline educational workshop per year

3 SUSTAIN HEALTHY AND RESILIENT AQUATIC ECOSYSTEMS

- A Partner with the Michigan Department of Natural Resources to conduct a creel survey to determine the success rates of anglers and fish species composition on Walloon Lake
- B Execute one contract per year to remove Eurasian Watermilfoil (*Myriophyllum spicatum*) from Walloon Lake
- C Conduct a comprehensive shoreline survey of Walloon Lake in partnership with Tip of the Mitt Watershed Council in 2026

LAND CONSERVATION AND ACCESS FOCUS AREA

4 PROTECT SIGNIFICANT CONSERVATION LANDS IN THE WALLOON LAKE WATERSHED

- A Pursue acquisition of the Randall's Point property to protect it as a nature preserve
- B Develop a Landowner Outreach Strategy (LOS) to educate all landowners with a Priority Parcel Analysis (PPA) score of medium, high, or very high about land protection opportunities in 2026
- C Execute the LOS in 2027

5 REVIEW AND UPDATE LAND PROTECTION PLANNING DOCUMENTS

- A Review and update WLAC's PPA
- B Review and update WLAC's Land Selection Criteria Policy (LSCP)

6 ENHANCE THE CONDITION OF TRAIL SYSTEMS AND FACILITIES ON WLAC PRESERVES

- A Establish trail maintenance standards for WLAC-managed trails systems
- B Assign a name and number to each trail
- C Develop new and consistent signage standards for nature preserves and conservation easements which include signs standards for property boundaries, information kiosks, trail junction maps, and interpretive signs
- D Clear all WLAC trails of down trees, overgrown brush, and overgrown grass each year, in cooperation with partners and volunteers
- E Develop a plan to enhance facilities at Postle Farm Preserve
- F Implement at least three capital improvement projects for trails and preserve facilities each year

7 REMOVE INVASIVE SPECIES FROM PRESERVES AND RESTORE ECOSYSTEM HEALTH AND FUNCTION

- A Prioritize at least five preserves for terrestrial invasive species treatment each year
- B Sustain the native pollinator gardens at Postle Farm Preserve, Voran Family Preserve, and Wildwood Harbor Nature Area by planting additional native plants and removing invasive species each year

8 INCREASE VOLUNTEER OPPORTUNITIES TO ENHANCE THE STEWARDSHIP CAPACITY OF NATURE PRESERVES

- A Host a volunteer information event to showcase volunteer opportunities to interested individuals
- B Host at least eight Walloon Warrior Workday events per year to engage volunteers, restore ecosystems, and sustain trail systems
- C Identify a volunteer monitor for each preserve that appears in WLAC's preserve field guide

COMMUNITY ENGAGEMENT AND EDUCATION **FOCUS AREA**

9 EXAMINE TRENDS IN MEMBERSHIP AND INCREASE THE TOTAL NUMBER OF WLAC MEMBERS

- A** Review current membership data and produce a report that analyzes trends in membership changes since the 2019 merger of the Walloon Lake Association and the Walloon Lake Trust and Conservancy
- B** Increase WLAC membership by 5% each year
- C** Conduct a survey of WLAC members to gather meaningful feedback on current activities and identify opportunities for improvement and future engagement

10 MODERNIZE AND STRENGTHEN THE LAKE AMBASSADOR PROGRAM

- A** Redefine the purpose and intent of Lake Ambassador Program
- B** Recruit five individuals to serve as Lake Ambassadors

11 STRENGTHEN RELATIONSHIPS IN THE CONSERVATION COMMUNITY AND CONNECT LOCAL STAKEHOLDERS WITH OUR CONSERVATION PROGRAMS

- A** Host five “Summer Speaker Series” events per year that deliver impactful information about conservation issues related to the Walloon Lake watershed
- B** Review and update our Memorandum of Understanding (MOU) with North Central Michigan College to support scientific research of Walloon Lake and our preserves and provide early career opportunities for college students
- C** Collaborate with partners such as local government, businesses, or other nonprofits on at least one conservation project per year that benefits the Walloon Lake watershed

12 INCREASE COMMUNITY ENGAGEMENT WITH GROUPS AND INDIVIDUALS IN AND NEAR THE WALLOON LAKE WATERSHED

- A** Deliver informational presentations about WLAC’s plans and programs at to at least five community groups per year to groups such as the North Country Trail Association, Top of Michigan Mountain Bike Association, Rotary Club, local chambers of commerce and the Walloon Lake Country Club, among others
- B** Develop and distribute at least 30 informational packets to realtors, marinas, and other local businesses and units of government to inform them about our work
- C** Plan and implement at least six community engagement events, including but not limited to educational workshops, guided hikes, group volunteer outings, and outreach events during the winter, spring, and fall seasons
- D** Plan and implement at least 12 community engagement events, including but not limited to educational workshops, guided hikes, group volunteer outings, and outreach events during the summer season

POLICY, PARTNERSHIPS, AND ADVOCACY **FOCUS AREA**

13 LEAD THE WALLOON LAKE WATERSHED COLLABORATIVE

- A** Assign one board member to serve as a voting member of the Collaborative
- B** Assign one staff member to serve as the facilitator for the Collaborative
- C** Assign one staff member to take minutes during Collaborative meetings
- D** Spearhead the completion of an annual work plan that includes realistic goals and objectives for the Collaborative to achieve each year

14 MONITOR THE ACTIONS OF LOCAL AND STATE UNITS OF GOVERNMENT THAT MAY IMPACT THE WALLOON LAKE WATERSHED AND TAKE ACTION WHEN NECESSARY

- A** Develop a volunteer position description for government monitoring activities
- B** Assign one volunteer to monitor the activities of each township that may impact conditions in the Walloon Lake watershed: Bay Township, Bear Creek Township, Evangeline Township, Melrose Township, and Resort Township
- C** Assign one volunteer monitor to monitor the activities of Charlevoix County that may impact conditions in the Walloon Lake watershed
- D** Assign one volunteer monitor to monitor the activities of Emmet County that may impact conditions in the Walloon Lake watershed
- E** Assign one volunteer to monitor the activities of the State of Michigan that may impact conditions in the Walloon Lake watershed
- F** Take action when state or local government projects, plans, or policies threaten the conservation value of the Walloon Lake watershed

15 INCREASE ENVIRONMENTAL ADVOCACY EFFORTS IN OUR SERVICE AREA

- A** Research, develop, and implement at least three environmental advocacy campaigns per year that drive action to protect land and water in the Walloon Lake watershed, with a focus on topics such as aquatic invasive species, septic tank maintenance and operation, and Swimmer's Itch, among others

ORGANIZATIONAL SUSTAINABILITY AND PHILANTHROPY **FOCUS AREA**

16 SUSTAINABLY FUND WLAC'S MISSION AND PLAN FOR FUTURE REVENUE NEEDS

- A** Develop a case statement that explains why donors should support WLAC
- B** Develop an annual fundraising plan as a part of WLAC's annual work plan
- C** Market opportunities to make donations in honor or memory of individuals at least once per year through at least three different communications and marketing channels
- D** Conduct an analysis to determine the principal balance necessary to have in WLAC's endowment funds to fund 30% of its annual operating budget
- E** Conduct an analysis to determine the target annual operating budget necessary to support seven full-time employees and three seasonal employees
- F** Execute at least one campaign per year to generate Legacy Society planned giving commitments
- G** Review and validate the customer relationship management (CRM) database ahead of each fundraising campaign to ensure accuracy, completeness, and campaign readiness

17 BUILD UPON AND EXPAND MEMBER AND DONOR RELATIONSHIP-BASED ENGAGEMENT

- A** Increase Guardian Circle membership by 5% each year
- B** Increase the Primary Guardian annual giving level from \$2,500 to \$3,000, while maintaining a three-year pledge commitment requirement for donors
- C** Increase commitments to Primary Guardian three-year pledges by 5% each year
- D** Host one event targeted at "Next Generation" supporters who are primarily age 18-45

18 BUILD CONSISTENT AND INNOVATIVE REVENUE SOURCES

- A** Submit at least six grant applications to raise at least \$100,000 per year through federal, state, private foundation, community foundation, and corporate foundation grant programs to support operations
- B** Increase fundraising through Business Sponsorship Program revenue by at least 5% each year
- C** Increase revenue to the Guardian Fund by 5% each year

19 ENSURE WLAC IS A MODEL 501(C)3 NONPROFIT ORGANIZATION

- A** Conduct an analysis of our organization's name and its implications, using a three-person task force
- B** Review, update, and distribute the board binder on an annual basis
- C** Conduct an analysis to identify opportunities to bolster health insurance benefits for regular employees
- D** Conduct an analysis to determine the pros and cons of shifting from a SIMPLE IRA retirement benefit to a 403(b)-retirement benefit for regular employees
- E** Develop annual work plans that implement goals and objectives from the 2023-2027 Strategic Plan and other pertinent organization planning documents each year
- F** Obtain reaccreditation from the Land Trust Alliance Accreditation Commission as an accredited land trust in 2027
- G** Facilitate at least three training opportunities for board members each year
- H** Coordinate at least two events per year that bring board members and staff members together outside of regular meetings
- I** Facilitate at least two professional development activities per year for each regular, full-time WLAC employee