



FOREST SOCIETY OF MAINE

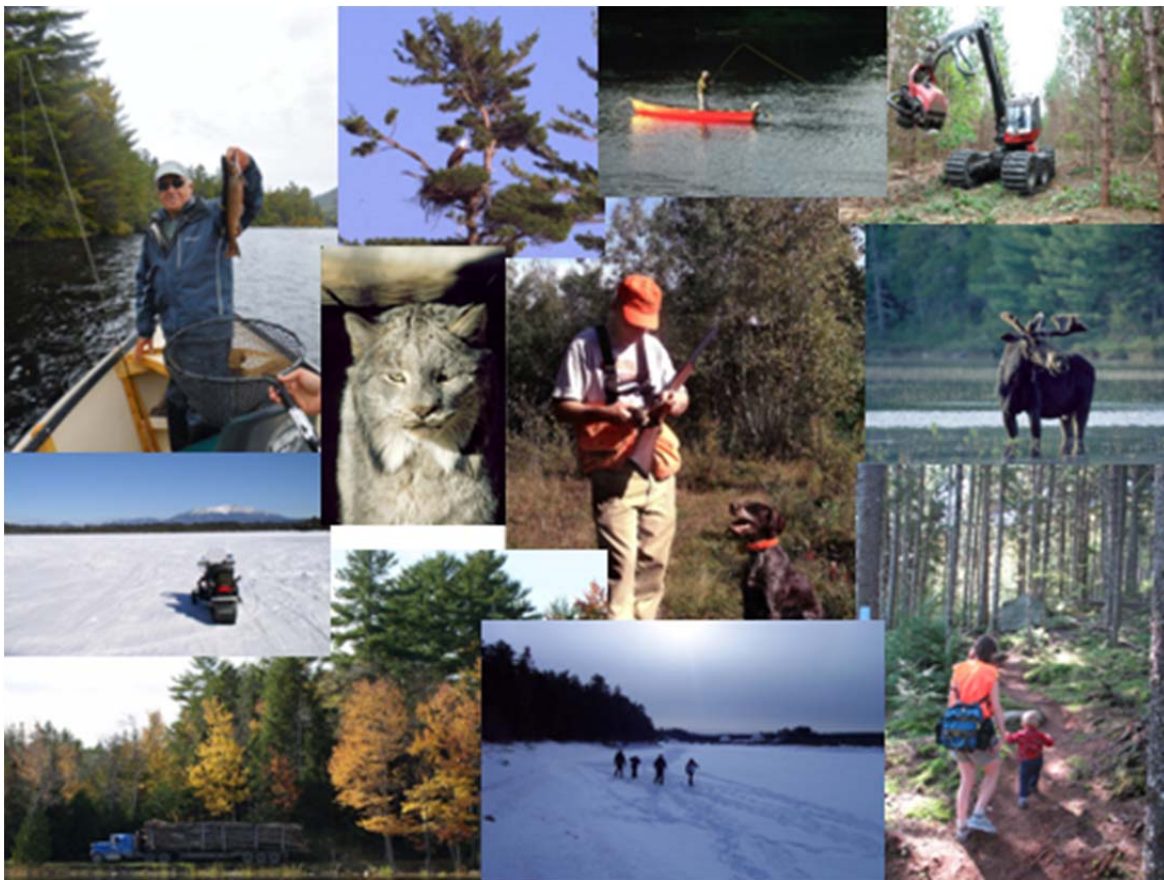
STRATEGIC PLAN June 2015 to June 2020

Approved by the Board of Directors
June 18, 2015



FOREST SOCIETY OF MAINE

Conserving Maine forestlands to sustain their ecological, economic, cultural and recreational values with a particular focus on large working forest landscapes



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STRATEGIC PLAN
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INTRODUCTION

The Forest Society of Maine (FSM) is a statewide land trust focused on protecting and conserving large tracts of Maine's North Woods. Maine is remarkably fortunate to have the largest remaining block of forestland east of the Rocky Mountains: 12 million acres of productive forests sustaining a flow of valuable forest products; 5,000 lakes and ponds; more than 4,000 miles of rivers and streams; hundreds of mountain peaks; an abundance and diversity of wildlife unparalleled elsewhere, and opportunities for extended backcountry sojourns with wilderness-like character.

FSM's mission is focused on helping to sustain this extensive tract of forestland and the many values it provides. The organization employs a multi-faceted approach to conserving the ecological, economic, cultural, and recreational values of Maine's forests. FSM remains in the forefront of the development, implementation, and monitoring of landscape-scale working forest conservation easements. Since the organization's inception in 1984, FSM has helped conserve one million acres (see Map 1) of primarily working forests with a science-based complement of ecological reserves, and has developed a state-of-the-art, conservation easement stewardship program to ensure compliance with easement terms.

In its approach, FSM has encouraged thoughtful and collaborative dialogue and conservation actions that encompass the full array of interests and ownerships in Maine's North Woods. This approach has been particularly important in the conservation of key tracts of forest landscapes including 20,000 acres around Niatous Lake, Big Spencer Mountain, 329,000 acres around the upper reaches of the West Branch of the Penobscot River, the 358,000-acre Moosehead Forest, the Amherst Mountains Community Forest, and a number of well-managed family forests.

The organization also has garnered strong credibility in the forestry and conservation communities as a result of its inclusive and collaborative approach. FSM's board of directors is composed of a diversity of members with forestry, conservation, and business backgrounds. The organization employs eight full-time staff and operates a main office in Bangor and a field office in Greenville.

FSM was incorporated in 1984, with help from the Society for the Protection of New Hampshire Forests (SPNHF), to hold an 18,000-acre conservation easement put in place by the Coburn Family Trust to conserve the array of important forest values on their lands around Attean Pond. SPNHF oversaw this easement for many years, as FSM existed in name only. In 1996, however, landowner, and conservation, forest products, government, science, and business leaders in Maine undertook a study that identified the need for an organization to help bring conservation options to the North Woods. Based on this study and broad discussions FSM was transformed into a Maine-based, independently functioning, staffed land trust focused on Maine's North Woods.

THE STRATEGIC PLANNING PROCESS

FSM adopted its first strategic plan in 1996. Subsequently FSM revised and updated its founding strategic plan in 2003 and 2008 in recognition of the changing needs in the North Woods, and in recognition of FSM's enhanced capacities and resources.

For the current update of the plan FSM's board of directors and staff decided to undertake a comprehensive strategic planning process (as was done prior to the 1996 strategic plan) that would engage the large network of North Woods interests that also reflect FSM's multi-faceted mission: landowners, conservation professionals, business leaders, and recreationists. The purpose was to test whether the assumptions upon which FSM was founded, and which have guided FSM's work so successfully for many years, remain valid looking forward.

Key questions asked of participants in the strategic planning process included:

- Does FSM's mission remain relevant with an eye toward meeting future challenges and opportunities?
- Should the founding mission be expanded or altered to meet future challenges and opportunities?
- How is the organization perceived today by its partners, supporters and other stakeholders?
- How should FSM define success looking forward?
- What are the key priorities around which FSM needs to focus its resources over the next ten years?

The strategic planning process began with board discussions in 2013 and the formation of a strategic planning committee consisting of six board members and three staff. Kathryn Hunt of Starboard Leadership (a Bangor-based consulting firm) was hired in 2014 to guide the overall process and to plan and implement the public participation component, which spanned seven months (September 2014 – March 2015). The entire process included:

- **Board discussions** focused on FSM's strengths and gaps and various current strategic issues relative to Maine's forests.
- **Eleven discussion groups** that involved collectively more than 200 stakeholders across Maine. Seven of the discussion groups included a mix of stakeholders from the region in which they were held; locations included Bangor, Portland, Dover-Foxcroft, and Augusta as well as the Downeast, Western Maine, and Mid-coast regions. The remaining four discussion groups engaged "affinity" groups, including recreational users, Maine Forest Product Council members, conservation professionals, and University of Maine students (all from environmental fields of study).
- **An on-line survey** announced via email and through FSM's Fall Newsletter completed by 37 participants. (This was a higher than anticipated number for this open type of survey.)
- **Phone interviews** with eight key founders and supporters.
- **Board of Directors strategic planning sessions** held in September and December of 2014.
- **Monthly meetings of the Strategic Planning Committee.**

It was deeply affirming to learn from the hundreds of stakeholders who participated in the process that they view FSM's mission and approach as continuing to hold relevance for the future. Their counsel was to "stay the course": continue to focus on conservation tools that sustain the region's economic, ecological, cultural and recreational values; innovate as necessary to adapt to changing needs; and maintain the collaborative and inclusive approach to working with the full array of interests and ownerships in Maine's North Woods that has proven so successful in FSM's first 30 years.

This new, five-year Strategic Plan is heavily informed by the views of the many participants who contributed their time, perspective, and wisdom to the process. For these contributions the Forest Society of Maine is deeply grateful. Ultimately, however, FSM's Strategic Plan is the result of board and staff decisions that weighed both the input of participants and the resources and capacities of the organization. Many thanks are due to the members of the strategic planning committee who devoted enormous time and energy to bring this plan to fruition. This plan will serve as the foundation for FSM's

annual work plans, and at the plan's midpoint (December 2017) FSM's board and staff will undertake a comprehensive review of progress.

FSM MISSION STATEMENT

The Forest Society of Maine conserves Maine forestlands to sustain their ecological, economic, cultural and recreational values with a particular focus on large working forest landscapes.

FSM VISION

FOR THE MAINE NORTH WOODS - In 50 years:

Maine's North Woods is a well-managed, ecologically diverse, working forest landscape largely unchanged in size from 2015. It sustains ecological, economic, cultural/historic and recreational values. Traditional public recreational activities and access continue. Important habitats, strategically targeted ecological reserves, and other special features are conserved as appropriate. These forestlands are supporting twenty-first century forest products and tourism activities that are thriving and enhancing the well-being and economic vitality of nearby communities, the region, and the state.

FOR THE ORGANIZATION - In 10 years, FSM will be:

- Widely recognized as the land trust for Maine's North Woods and perceived as a trusted and competent organization.
- True to its original mission—focusing on large ownerships of working forestlands, conserving their ecological, economic, recreational and cultural values, and protecting the unique character of Maine's North Woods.
- Viewed by forestland owners as the organization to turn to as a source of information and assistance when seeking options to keep their forests as forests.
- Able to develop, negotiate, and complete complex forestland real estate transactions.
- Second to none in its stewardship program that is technology and science-based and attends to all stewardship responsibilities in a diligent, timely and businesslike manner.
- Innovative and flexible in achieving its mission, since conservation tools, funding sources, and/or typical project size and focus may change over time.
- Continuing to use conservation easements as its primary tool in land conservation but also exploring and implementing innovative new techniques to advance FSM's mission.
- Working in partnership with many other conservation organizations and agencies to achieve its mission.
- Staffed adequately in all program areas—land conservation, stewardship, fundraising/outreach, and organizational governance/administration (envisioning a staff of 10-11 full-time employees), with organizational growth most likely focused on the program areas of stewardship and outreach/fundraising.
- Where employees feel challenged, valued, rewarded, and integral to an important mission.
- Where board members feel challenged, valued, rewarded, and integral to an important mission.
- Financially sound with a growing, healthy balance sheet and endowment sufficient to fully support the stewardship program (including all direct and indirect support services and costs) and sufficient to provide about 25% of FSM's other operating expenses.
- Helping ensure an enduring financial base through twice as many members/supporters as existed in 2015, and a doubling of the amount raised through its annual fund appeal (from individuals, businesses and foundations).

GUIDING PRINCIPLES

These guiding principles are presented to add further definition to FSM. They are intended to help describe the organizational approach and character that make FSM distinctive. They also provide a sense of how FSM allocates organizational time and resources toward fulfilling its mission.

Leadership approach: FSM believes there is much common ground to be found among the array of interests in Maine's North Woods and works to bridge differences in understandings and develop positive solutions to what are often complex and challenging problems. FSM encourages listening, the sharing of ideas, and identifying opportunities for positive solutions among diverse interests. FSM avoids vilifying as it conducts its work and respects differing viewpoints, working to find common ground and positive, businesslike solutions.

Geographic area of focus: FSM's focuses its work on the extensive block of primarily undeveloped, contiguous forestland as depicted on Map 2. This region extends from the New Hampshire border, broadly following the Appalachian and Boundary mountain ranges north to Moosehead Lake, the Hundred Mile Wilderness, and Baxter Park, continues north to include the St. John and Allagash river watersheds, and continues east of Baxter Park and then south again through Downeast Maine, where this great contiguous forest meets the sea. FSM sees this large region as composed of three distinct areas (see Map 2), each with distinctive characteristics, communities, conservation needs, and stakeholders.

Niche: From a mission perspective, FSM fills a unique niche by providing a balanced approach to conserving the special nature of Maine's working forest landscape. The organization develops land conservation programs that will sustain the land's ecological, economic, cultural, and recreational values. This is done with the full involvement of forestland owners and by working with nearby communities and an array of stakeholders. To reflect this multi-faceted approach to land conservation, FSM maintains a diversity of board members with forestry, conservation, and business backgrounds.

Collaboration: FSM works with diverse groups to maintain a leadership role regarding forestland conservation. FSM will seek out strategic relationships to reach goals in large projects, avoid duplicating the work of other organizations, and provide assistance to local and regional land trusts and other community organizations that are working on forest conservation issues and projects. FSM's primary focus is on regions of Maine's North Woods where there are no local land trusts. In locations with other land trusts, like the Downeast Lakes Land Trust, Rangeley Lakes Heritage Trust, Mahoosucs Land Trust, Small Woodland Owners Association of Maine, and Frenchman Bay Conservancy, FSM will defer leadership on projects to those groups or work in coordination with them. FSM also routinely seeks to partner with other state-wide conservation groups, including Maine Coast Heritage Trust, The Nature Conservancy, and Trust for Public Land.

Conservation tools: Conservation easements are envisioned to continue serving as a primary tool for FSM's conservation work. The organization has invested in building a strong conservation easement stewardship program and is committed to maintaining that focus and competency while also evaluating new tools that may become useful in the future. FSM works closely with the University of Maine and other research institutions to remain current with the latest science and emerging technologies. FSM owns few lands outright, and will proceed cautiously with decisions to acquire additional lands in fee.

Private forestland ownership: FSM recognizes the significant role that private ownership and management has played and will continue to play in Maine's North Woods. A primary reason this great expanse of forestland remains intact is due to the history of private ownership. As managed forests, the

economics of land ownership was the incentive for the land to remain undeveloped, providing the array of values associated with the North Woods. FSM was created to help provide conservation options to private landowners to help keep these forests as forests, and sees private land ownership continuing to play a significant role into the future.

Ecological reserves and late successional forests: FSM views an ecologically-diverse forest as one that includes all natural community types and forest age classes appropriately represented across the landscape, including mature/late successional forests. FSM recognizes that setting aside harvestable acres, especially forestland with mature, commercial species, can be difficult for private landowners. FSM looks to achieve such outcomes through a business-like approach. FSM typically turns to other conservation organizations, such as TNC, to take the lead on projects with ecological reserve outcomes, but recognizes that there are situations where FSM is best suited to help. Examples include situations where a landowner prefers FSM, or when a donor or organization such as TNC needs a proven organization to hold an ecological reserve easement. FSM will make decisions regarding its involvement with ecological reserves based on the fit with FSM's mission and other criteria adopted by policy.

Economic development: FSM's mission, resources and competencies intersect with the economic needs and goals of communities. When these circumstances arise, particularly in communities near FSM conserved land, FSM will participate in work that helps to build the economic strength of communities that depend on the ongoing vitality of Maine's forests. Care will be taken to ensure that this work supports FSM's core mission of forestland conservation and stewardship by working in a discretely defined role and with other groups, whose core mission is economic development.

Climate change: FSM recognizes that the climate is changing, and that a changing climate will have significant effects on many aspects of Maine's North Woods and FSM's conservation work. FSM will stay abreast of the science regarding how those changes are anticipated to affect Maine's forests. FSM will incorporate the emerging science on climate change into our conservation and stewardship work.

Education and outreach: FSM's primary focus is on land conservation and stewardship. FSM's educational and outreach activities are limited to building broader understanding of: 1) FSM's mission and work; 2) FSM's conservation lands; and 3) the importance and special character of Maine's North Woods. FSM's educational and outreach efforts are targeted and strategic and feature its existing land conservation and stewardship programs. Resources will be dedicated to ensure that education and outreach efforts help build awareness of and financial support for FSM's conservation and stewardship work. This work is often done in partnership with other organizations such as Maine Tree Foundation and Natural Resource Education Center that have education and outreach as their core mission.

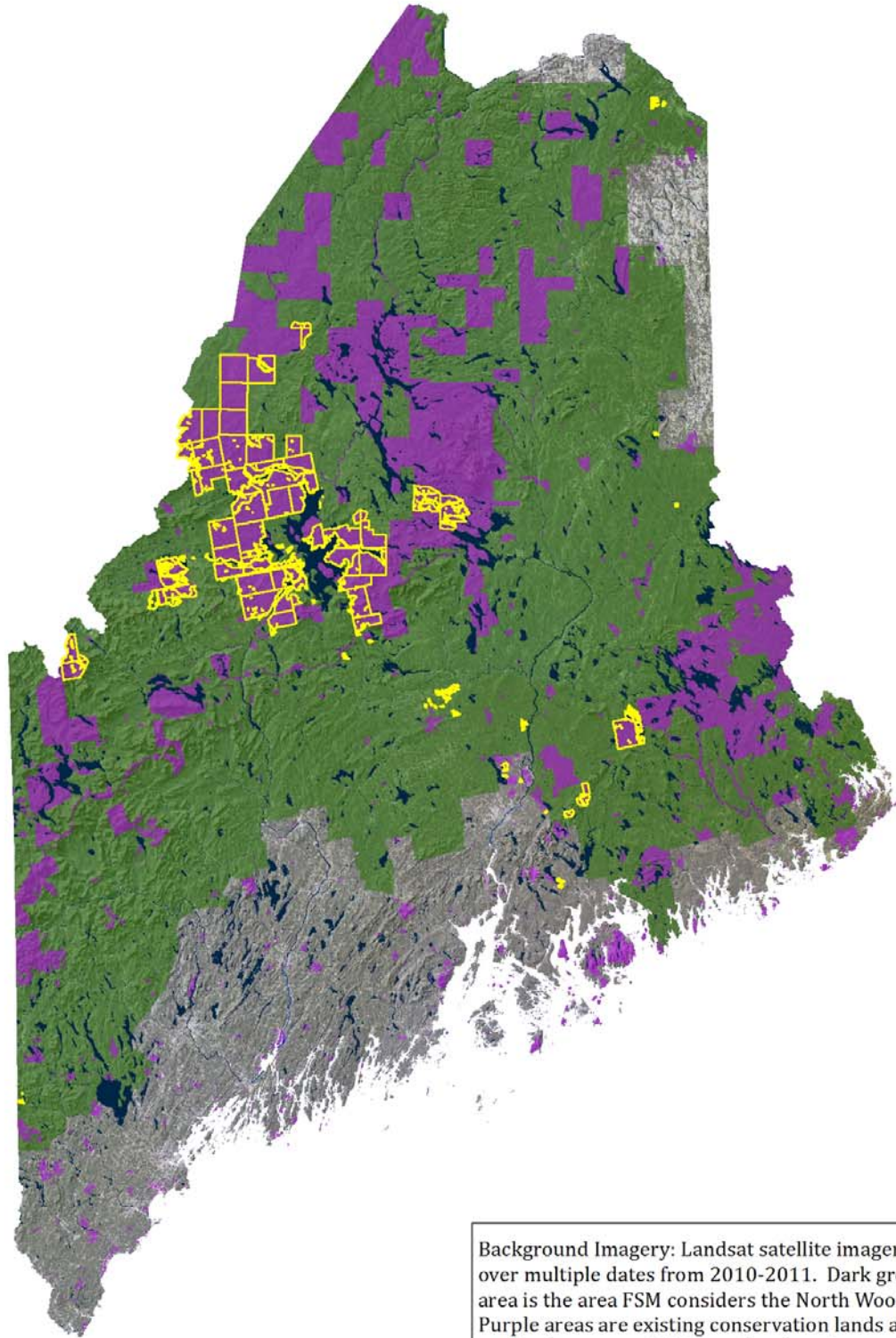
Community engagement: FSM works with local communities that are nearby lands the organization has helped to conserve or is helping to conserve. Community engagement is vital to all stages of FSM's conservation work from identifying possible new projects, to building support for those in progress, to creating connections to lands already conserved. FSM's community engagement is designed to leverage economic and community health from the predictability offered by conserved lands.

Advocacy: FSM's primary focus is on land conservation and stewardship. FSM's public policy interests and advocacy efforts are limited to matters related to forestland conservation programs at the federal (e.g., the Forest Legacy Program, North American Wetlands Conservation Act, and Land and Water Conservation Fund) or state (e.g. Land for Maine's Future Program) level and on matters that affect FSM properties or proposed properties.

Public access on private lands: An important part of FSM's mission is working to help assure that public access for traditional recreational activities will continue. FSM recognizes that the tradition in Maine of public use of private lands for recreational activities is a privilege provided by landowners, not a right, and is quite unique, nationally. FSM recognizes that this situation, while long-standing, is maintained through the good will of the landowners and responsible members of the public, and is supported by certain state laws. FSM works with willing landowners, on a case-by-case basis, to secure guarantees of public access, in a variety of ways, for traditional recreational activities as part of FSM's land conservation projects.

Cultural and historic values: Sustaining the cultural values of Maine's North Woods is a key component of FSM's mission. In particular FSM recognizes the rich, deep, and ongoing cultural connections of Native Americans to Maine's North Woods. Also of importance is the more recent history of European exploration and the lumbering industry. FSM seeks to incorporate these unique cultural and historic values into the organization's conservation activities.

Map 1. 2015 Conservation in Maine's North Woods



Background Imagery: Landsat satellite imagery, acquired over multiple dates from 2010-2011. Dark green shaded area is the area FSM considers the North Woods. Purple areas are existing conservation lands and outlined areas are FSM completed projects.

Map 2. Depiction of what FSM considers Maine's North Woods (greenish-yellow areas).

