



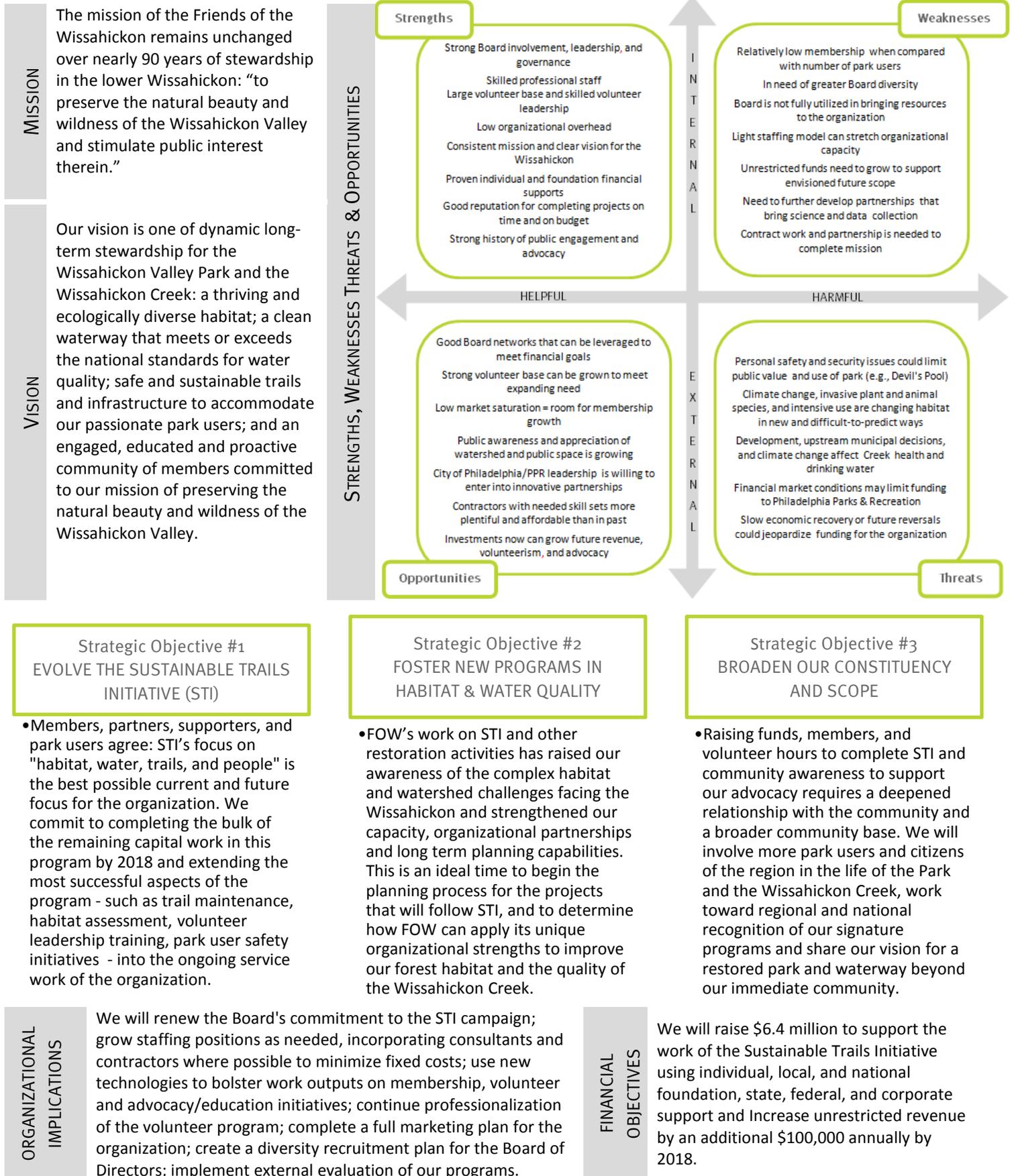
FRIENDS OF THE WISSAHICKON

*To preserve the natural beauty and wildness of the
Wissahickon Valley and stimulate public interest therein.*

Strategic Plan 2013 - 2017

Approved by the Friends of the Wissahickon Board of Directors May 14, 2013
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FRIENDS OF THE WISSAHICKON 2013-2017 STRATEGIC PLAN: EXECUTIVE SUMMARY



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FRIENDS OF THE WISSAHICKON

MISSION

The mission of the Friends of the Wissahickon remains unchanged over nearly 90 years of stewardship in the lower Wissahickon: “to preserve the natural beauty and wildness of the Wissahickon Valley and stimulate public interest therein.”

VISION

Our vision is one of dynamic long-term stewardship for the Wissahickon Valley Park and the Wissahickon Creek: a thriving and ecologically diverse habitat; a clean waterway that meets or exceeds the national standards for water quality; safe and sustainable trails and infrastructure to accommodate our passionate park users; and an engaged, educated and proactive community of members committed to our mission of preserving the natural beauty and wildness of the Wissahickon Valley.

INTRODUCTION

ABOUT THE WISSAHICKON VALLEY PARK AND WISSAHICKON CREEK

The Wissahickon Valley Park is a beautiful wooded gorge in the City of Philadelphia, extending from the Chestnut Hill neighborhood in the north to the Manayunk neighborhood in the southwest. The Wissahickon Creek runs through the Park's entire seven-mile length. The Park was created in 1868 to preserve the quality of Philadelphia's drinking water; today, water from the Wissahickon Creek still enters the City's drinking water intake system at the creek's confluence with the Schuylkill River, via the Queen Lane intake station. The Park's main trail is Forbidden Drive, a wide, gravel multi-use old roadbed closed to automobile traffic, which parallels the Creek through the length of the Park. Wissahickon Valley Park contains more than 50 miles of often rugged natural surface trails open to a variety of users including hikers, bikers and equestrians, and the Park is host to diverse native plant and animal species.

There are 1.1 million visits to the Wissahickon Valley Park each year

The 1,800 acres of Wissahickon Valley Park ("the Wissahickon") are part of Philadelphia's 10,500-acre park system, one of the largest urban park systems in the world. The Wissahickon is a unique resource for Philadelphians and their neighbors throughout the region. It serves as a vital wildlife corridor for native plant and animal life; it provides a high quality outdoor recreation experience for citizens of the region; it acts as an economic anchor in Northwest Philadelphia; and it meets a significant public health mandate in preserving and protecting a drinking water source that serves nearly one third of all Philadelphians.

ABOUT FRIENDS OF THE WISSAHICKON

Founded in 1924, the Friends of the Wissahickon (FOW) is the oldest and only professionally staffed friends group in the Philadelphia Parks & Recreation system. FOW's stewardship activities target issues that affect the ecological health of the park overall, from a dramatic park-wide re-forestation effort in the 1930s, to the implementation of the innovative deer population control program in partnership with the Fairmount Park Commission in the late 1990s and early 2000s. In the last decade, with the support of a capacity building grant from the William Penn Foundation, FOW has developed a full-time professional staff that has enabled greater reach in our programmatic work, and deepened our partnership opportunities with Philadelphia Department of Parks & Recreation, the Philadelphia Water Department and other municipal agencies and regional organizations.

FOW's current signature program is the Sustainable Trails Initiative (STI), a comprehensive transformation of over fifty miles of natural surface trails of the Wissahickon to improve watershed health, habitat, user experience and safety in the Wissahickon Valley Park. STI encompasses trailbuilding, invasive plant removal, native plantings, the creation of park wide wayfinding systems, and the formation of a robust and professionalized volunteer program to provide environmental restoration and environmental education services in the Wissahickon. In addition to STI, FOW has several key programs and projects that are ongoing. The Protect Our Watershed (POW) Program is a land preservation and citizen education program focused on reducing the impact of stormwater runoff in the Wissahickon Valley Park. The dual objectives of preserving the health of the Wissahickon watershed through the promotion of conservation easements on significant properties adjacent to the watershed and educating citizens about how the landscape of their property impacts the Wissahickon watershed are met through outreach events, publications and educational opportunities. The Deer Program is conducted through a partnership with Philadelphia Parks & Recreation, and focuses on the management of wildlife populations as well as assessment of the impact of deer populations. The Structures group, part of our volunteer programming, is dedicated to

rebuilding and maintaining the historic structures in the park. The Valley Green Inn Oversight Committee and the Valley Green Environmental Restoration Project are ongoing stewardship commitments to the maintenance and preservation of the historic Valley Green Inn and its surrounding landscape and habitat. FOW's program work on land and watershed conservation outside of the Sustainable Trails Initiative includes public education efforts and partnering with the Chestnut Hill Historical Society on their Easement Committee, which seeks to preserve the character of Chestnut Hill and its surrounding communities and to conserve the remaining open space in the lower Wissahickon watershed.

The Wissahickon Creek
contributes to the drinking
water for 350,000 people in
the City of Philadelphia

FOW's Advocacy initiatives cover a broad range of areas and strategies: we work on user conflict and safety problems (e.g., managing mountain biking and other forms of active recreation, discouraging litter and diving at Devil's Pool); land use and land protection within the Wissahickon Valley Park and on park land City-wide; we work with the Philadelphia Parks Alliance for increased funding for Philadelphia Parks & Recreation from City Council) and on preservation of all City parkland through the creation and appropriate application of the Parkland Protection Ordinance (passed by Philadelphia City Council in 2011); we monitor land use and development in the watershed on both municipal and private land; and we advocate for land conservation and use of best management practices in all new and redevelopment projects. The FOW Advocacy Committee also meets with local elected officials and municipal offices to keep them informed about FOW and our program work, as well as the needs of our shared constituents.

THE COMMUNITY WE SERVE

My Park Counts, the 2011 Friends of the Wissahickon Park User Survey and Count, estimates that there are 1.1 million visits to the Wissahickon Valley Park each year. This is a significant increase from the last count in 1996, which estimated just over 700,000 visits each year. The *My Park Counts* survey also reported that more than half of all park visitors come from Philadelphia county, with the rest from other Pennsylvania counties (primarily lower Montgomery) and a small percentage (less than 10%) from other states. Utilizing the Philadelphia NIS NeighborhoodBase, of the total population of City neighborhoods adjacent to the Park, 55% of the residents are African-American, almost 2% are Asian, 2% are Hispanic, 41% are White, and less than 1% are other ethnicities.

The Wissahickon Valley Park is used intensively, with over 80% of survey respondents reporting that they use the Park more than once a month. Park users tend to engage in active outdoor recreation, like walking (86% of respondents), dog walking (60%), biking (57%), and running (37%). Although swimming is illegal in the Wissahickon, 31% of respondents reported that they swim in the Wissahickon Creek. Other active forms of recreation in the Wissahickon include horseback riding, fishing and bird watching. The Wissahickon Creek contributes to the drinking water of an estimated 350,000 people in the City of Philadelphia, primarily in the Northwest and Center City.

CONTEXT AND PROCESS

The 2013-2017 Strategic Plan builds on the growth charted by FOW's 2002 and 2008 plans. Since 2002, FOW has seen tremendous growth in: staffing (from 0.8 Full Time Equivalents in 2002 to 6.6 FTE in 2012); in the organization's net asset base (from \$311,000 in 2002 to \$1.7 million in 2012); and in our annual budget expenditures (\$158,218 in 2002 to over \$1 million in 2012). Our project work has a larger scope, our volunteers are more numerous, capable, and productive, and our partnerships with municipal agencies and other nonprofits are more robust than at any time in our history. We made infrastructure changes to our Board operations during the most recent planning period, including the establishment of term limits, codified Board expectations, and the nominations process. And in the past year we have invested in new accounting procedures and practices, allowing greater transparency in our operations and closer tracking of our program costs vs. outcomes.

Past foresight on the part of the Board has established that FOW is capable of orchestrating politically and socially complex stewardship activities and maintaining them over time, as evidenced by the work of the Deer Committee. That foresight, along with the ongoing hard work of the Valley Green Inn Oversight Committee, has also established a consistent line of unrestricted revenue from our rental agreement with the operator of the Valley Green Inn, which from 2012 onward includes a percentage of gross profits. In both of these cases, today's FOW is reaping the results of planning begun in the 1990s. Similarly, in this planning period Directors will be looking to both the near term and far future of the organization, revisiting both our lease with our Valley Green Inn landlords, Fairmount Park Historic Preservation Trust, and our restaurateur, Big Way, Inc., in a way that is consistent with FOW's values and contributes future resources to the Wissahickon.

Since 2002, FOW has seen more than a fivefold increase in staffing numbers, net assets, annual revenues and expenditures

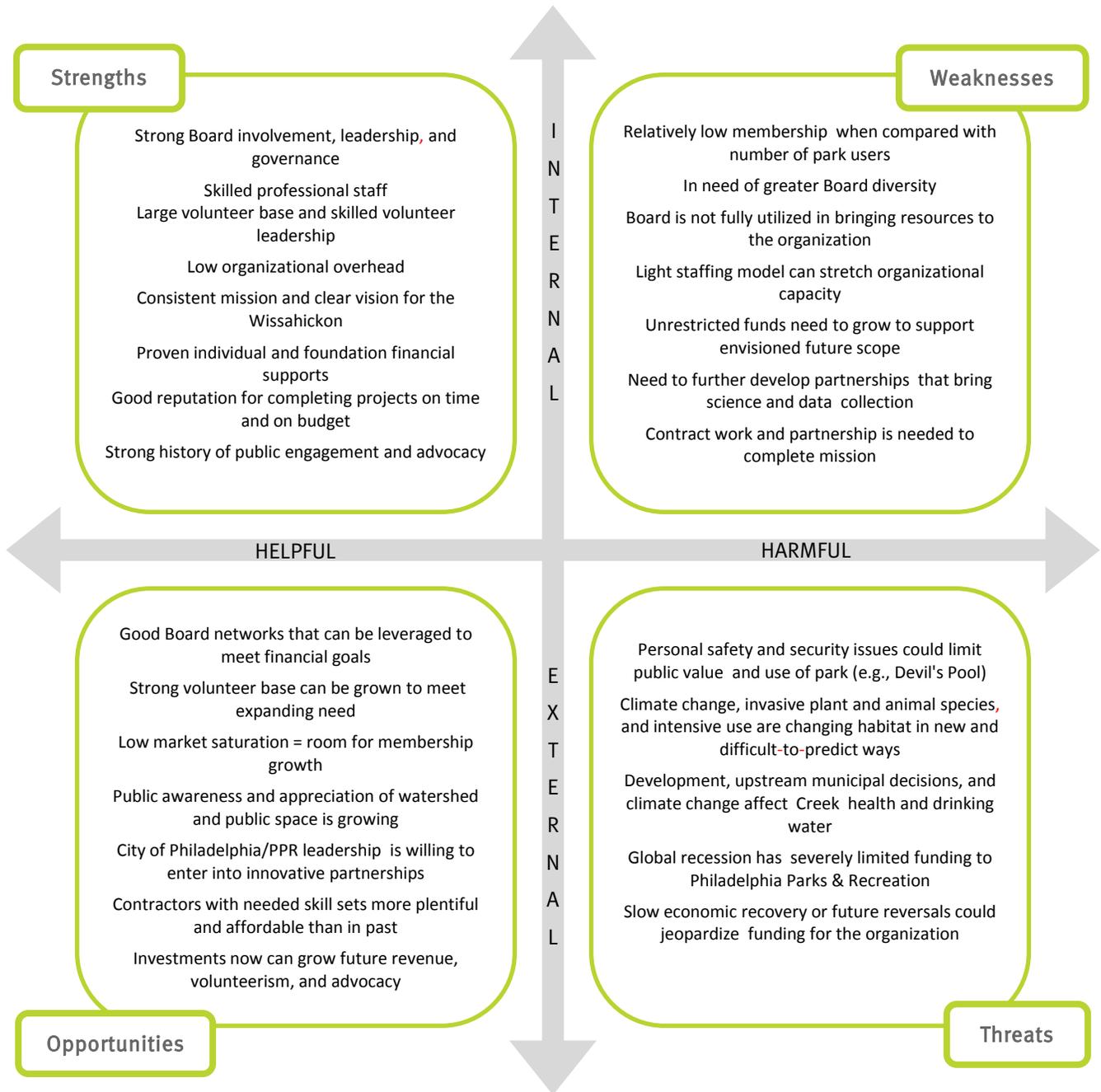
Our growth over the last decade was driven by several factors: a vision for comprehensive project work, like the Protect Our Watershed program and the Sustainable Trails Initiatives, which involves the community and moves our environmental stewardship goals and organizational mission forward in a substantive way; an awareness of the financial challenges facing our municipal partners who own the land of the Wissahickon Valley Park; and a desire to uphold and contribute to a high standard of park stewardship. With this recent growth supporting us, today's FOW can be described as emerging from the "late adolescence" phase of the nonprofit life cycle, looking to step into the "mature" phase of our growth. In the upcoming planning cycle, FOW will confidently use outcome driven measures to gauge organizational success and inform future investment, and continue to serve the Wissahickon with innovative and visionary project work.

THE 2013-2017 STRATEGIC PLANNING PROCESS

Planning actions undertaken by FOW began with a review of the 2008-2012 Strategic Plan. The review was immediately followed by a data collection period in which the Board assessed the current and future contexts and conditions in which the organization is operating, and considered possibilities for future focus. This was done with input from dozens of external groups and over one thousand individuals, using: public perception data collected from the *My Park Counts 2011 Park User Survey*; another online survey of closer stakeholders including local schools, partner nonprofit agencies, and volunteer leaders; interviews with key stakeholders (PPR, PWD, and William Penn Foundation); three meetings and six conference calls with 21 current Directors and three past Directors. The process helped us decide which priority areas to expand and which to maintain or deemphasize, establishing the rationales for the objectives in the 2013-2017 planning period.

ASSESSMENT OF STRENGTHS, WEAKNESSES, OPPORTUNITIES, AND THREATS

At the start of the strategic planning process, FOW assessed the strengths, weaknesses, opportunities, and threats facing the Wissahickon Valley Park, the Wissahickon watershed, and the Friends of the Wissahickon organization. As a part of this assessment, we drew on over a thousand replies to the *My Park Counts* user survey, created new survey tools for key constituents, and interviewed representatives of priority partner organizations, as well as our own internal reviews. The feedback from this assessment process is collected below:



DISCUSSION OF FUTURE PRIORITIES AND DIRECTIONS

PARTNER AND PARK USER FEEDBACK

Data from our two surveys (of park users and organizational stakeholders) and feedback from key partnering organizations overwhelmingly indicated that FOW's highest value programs—the core of our mission—are our in-park capital improvement programs, specifically the trail and habitat work being conducted as part of our Sustainable Trails Initiative. There is wide agreement from our partners and constituents that FOW's years of proven investment in the Wissahickon, our strong community base, our professional staff, and our exclusive focus on the Wissahickon Valley Park make us uniquely suited to address the needs of the Wissahickon's trails, land, and water. We are building a future in which we confidently use outcome driven measures to gauge organizational success and inform future investment, and continue to serve the Wissahickon and its community of users with innovative and visionary project work.

Park users, partnering organizations, and Directors all agreed that trails and habitat restoration are and should remain FOW's highest priority.

Our key municipal partners, **Philadelphia Parks & Recreation (PPR)** and the **Philadelphia Water Department (PWD)** also gave extensive feedback, sharing their value for our volunteer programming and some specific ways in which we can advocate for the issues of most importance to the organization. Finally, we considered the emerging priorities of one of our most important funding partners, the **William Penn Foundation**, as an indication of regional trends in policy and funding priorities.

INTERNAL DISCUSSION

In our Fall 2012 meetings and conference calls, FOW Directors considered FOW's history, current programming, relationships and obligations, and all of the above feedback in shaping our future directions.

First and foremost, the Board considered and confirmed that our original mission statement “to preserve the natural beauty and wildness of the Wissahickon Valley and stimulate public interest therein” still reflects the mission and values of the organization (with the caveat that “wildness” is frequently debated with regards to the Valley).

In creating our strategic objectives for the next five years, the Board weighed the following:

- Of all of the possible priority work areas open to FOW, which are most closely aligned with our mission?
- Are we well positioned to take on the priority work areas before us? Do we have the connections, functional partnerships, and knowledge base needed to take on these issues?
- Are these priority areas ones that we can manage in tandem with the immediate, reactive needs of the Park in mind?
- Is FOW the best or only entity to address these issues?

FOW's years of investment in the Wissahickon, our strong community base, professional staff, and exclusive focus on the Wissahickon Valley Park make us uniquely suited to address the needs of the Wissahickon's trails, land, and water.



OBJECTIVE 1: EVOLVE THE SUSTAINABLE TRAILS INITIATIVE

RATIONALE: Five years into our decade-long Sustainable Trails Initiative (STI) program, we find that it has acted as a catalyst, enabling the improvement of the Park's capital infrastructure, a means of addressing park user conflicts, a deepened commitment to FOW's core mission and values, expanded organizational capabilities, and a wealth of opportunities for community involvement. STI's focus on "habitat, water, trails, and people" is recognized by our members, partners, supporters, and park users as the best current and future focus for the organization. To maintain our momentum and public investment in the project, we commit to completing the bulk of the remaining capital work in this program by 2018, and extending the most successful aspects of the program - such as trail maintenance, habitat assessment, volunteer leadership training - into the ongoing service work of the organization.

The targeted outcomes of the STI program are: redesigned and rebuilt natural surface trails that withstand use and minimize the impact of trail use on the habitat; improved and increased natural habitat of trees, shrubs, and grasses that can support native wildlife; improved water quality in the Wissahickon Creek, contributing to improved drinking water quality for the City of Philadelphia; and increased safety for park users through safer trails, readily understandable signage, better communication with enforcement agencies, and corresponding data in the City's emergency response systems.

FOW has a history of keeping the best parts of our programs and, once they are largely complete, incorporating them into our ongoing operations. This model was first used with the Protect Our Watershed program's conservation easement strategy and with the creation of our ongoing Deer Management program. This model will be used again as we move toward completion of STI -- although we commit to completing 80% of the capital work of STI, we also commit to continuing some of its crucial elements beyond this five year period (e.g., volunteer leadership, habitat monitoring and assessment, trail maintenance, park user safety) and evolving these programs to lend new relevance and urgency to our century-old mission.

KEY ACTIONS AND TIMEFRAMES

- 2014** Create a regional STI completion plan that phases the remaining aspects of the project by geographic park region (including trail redevelopment, habitat monitoring and restoration, signage, and any additional infrastructure - bridges, composting toilets)
- 2016** Formalize volunteer leadership programs and open by arrangement to selected partner organizations.
- 2017** Establish which aspects of the STI program will live beyond the sunset of STI (e.g. volunteer leadership programs, Trail Ambassadors, habitat health assessments, signage maintenance, safety initiatives), which will grow into a new scope (e.g., the growth of Trail Ambassadors as an education and advocacy resource for the community) and create a plan for future funding and infrastructure support for these programs
- 2018** Complete 80% of the remaining capital infrastructure improvements; raise the remaining \$6.4 million needed to complete the STI plan and establish a maintenance fund for capital improvements installed as a result of STI.



OBJECTIVE 2: FOSTER NEW PROGRAMS IN HABITAT & WATER QUALITY

RATIONALE: FOW's work on the Sustainable Trails Initiative, the Deer Program and other restoration activities has raised our awareness of the many complex habitat and watershed challenges facing the Wissahickon Valley Park. These programs have also built our capacity, organizational partnerships and long term planning capabilities. As we work to complete STI over the next five years, this is an ideal time to begin the lengthy planning process needed to identify the most critical issues facing the Wissahickon, and to determine how FOW can apply its unique organizational strengths in the future to improve our forest canopy and understory, and the quality of the Wissahickon Creek.

Since the 1930s, Friends of the Wissahickon have grappled with the issues of forest succession and canopy degradation in the Valley. Our two most important projects in the last twenty years -- the Deer program and the Sustainable Trails Initiative -- offered two different methods of addressing this ongoing problem. With the success of these programs and recent Parks & Recreation investments in researching forestry issues, this planning period is an ideal time for investigation of future programming for canopy and habitat issues. Over the next five years, through the work of the Conservation Committee, Advocacy Committee, and our partnerships, we will explore questions like: What does "improvement" of canopy conditions mean? How much time and effort should we be willing to invest to improve our forest? Can we identify and proactively combat threats to our canopy (e.g. red oak, ash)? Do we want to encourage a migratory shift in plant populations that reflect new weather conditions in the area, or do we want to pursue repopulation of the Valley with a "lost" or reduced species (e.g. hybrid chestnuts, elms)? Once goals are established, will we need to advocate for new policy positions to achieve our goals (e.g. advocate the City and State for controlled burns in the Valley)?

FOW's investment in watershed health issues is more recent, but urgently felt-- flood-related and storm water damages have ravaged the Park and the watershed in the last two decades, and the community has focused more on health issues and the viability of our drinking water. Our work on water through the Protect Our Watershed program and through STI has raised some questions for us: What are realistic goals for improving the quality of our drinking water and watershed health? How can FOW best use its resources to pursue watershed rehabilitation? What are our best land preservation options if conservation easements are no longer incentivized at the federal level? How can we use our organizational strengths to position ourselves as a key stakeholder in watershed policy debates?

KEY ACTIONS AND TIMEFRAMES

- 2014** Deepen partnership with WVWA to include support of their water testing program; follow and support PPR's ongoing development of forestry standards and practices
- 2015** Establish "PSI Plus"ⁱ through the Conservation Committee; update the volunteer program to support PSI Plus; at least 2 volunteer per year to complete that leadership training module
- 2016** Complete online Wissahickon Watershed resource center completed; Board-spearheaded research into comparable national models of watershed redevelopment underway
- 2018** Define the long term direction and goals of FOW's habitat and water quality programming; a comprehensive written plan for future direction in these areas complete



OBJECTIVE 3: BROADEN OUR CONSTITUENCY AND SCOPE

RATIONALE: Raising funds, members, and volunteer hours to complete STI and community awareness to support our advocacy positions and research on habitat and water issues requires a deepened relationship with the community and a broader community base. We will involve more park users and citizens of the region in the life of the Park and the Wissahickon Creek, and work toward regional and national recognition of our signature programs. With a strong reputation in the local environmental community, it is time for FOW to make its work more widely known and to further our vision for a restored park and waterway beyond our immediate community.

To meet the first two objectives of this plan and strengthen our stewardship work overall, we will:

- Work to expand the constituent base of FOW through greater investment in marketing. We have to learn more about what effective marketing looks like for our organization, which may lead to targeting Board development and staff development needs, as well as increase communications costs. Work toward a membership that represents the community of users as well as the community of watershed residents, and Board representation that is more diverse, maximizes networks, and is informed on critical issues.
- Continue to invest in the current FOW programs that can best be used to build relationships upstream, primarily our volunteer leadership programming, as well as our public lecture series and outreach programming. We will pursue upstream and cross-watershed opportunities to partner with other entities in ways that build on the strength of these programs (e.g., workdays, lectures, walks, invasive or planting projects, etc.).
- Deepen partnerships with organizations pushing forward science based monitoring of the Wissahickon (Philadelphia Water Department, Wissahickon Valley Watershed Association, US Geological Survey, and Senior Environmental Corps), and use these science based sources as the cornerstone of both FOW's future actions and our messaging to the community. We will look upstream to build partnerships with these and other agencies that provide us with perspective on water quality issues, keep us informed about upstream activities, and help us to build a stronger advocacy position (particularly with upstream municipalities and land protection agencies).
- Build the profile of the organization and understanding of our mission through relationships with elected officials, public discussion of park issues, and advocacy for the stewardship of the Wissahickon Valley Park, the watershed, and open spaces City-wide.

KEY ACTIONS AND TIMEFRAMES

- 2014** Form a Board working group on Marketing, setting scope for the marketing initiative; integrate social media into our Advocacy process to better involve the membership; continue Trail Ambassador and Ranger efforts to communicate safety information
- 2015** Complete new Marketing Plan and begin the first stages of implementation
- 2016** Leverage our strong volunteer program into partnership opportunities that will create ties to other watershed entities
- 2017** Initiate a relationship with at least one new national level funding organization
- 2018** Expand the membership base by 100% and increase volunteer activity and output by 50% from 2012 numbers by the end of this planning period

ORGANIZATIONAL IMPLICATIONS

The three strategic objectives in this document detail what FOW will be working on and toward over the next five years. The next two sections, Organizational Implications and Financial Objectives, describe how we will pursue our goals — with a dual emphasis on growth and metrics at all levels of the organization.

For FOW to meet the three strategic objectives of this planning period, we must undergo sustainable and targeted growth of our current and future program commitments, commit to using outcome driven measures to assess our program work and our organizational effectiveness, grow revenue, and proactively manage and anticipate infrastructure needs. We will strive to remain nimble in our ability to respond to the demands of the Park, leaving flexibility in our long- term planning, projects, and objectives to accommodate any unforeseeable incidents that call for an immediate response, as staff and volunteers so ably responded to Hurricane Sandy in 2012. We will not burden the organization with new areas of liability through substantial additions to property or staffing that would stifle our ability to act responsively to emergencies even as we plan and implement long -term projects.

NEEDED SKILLS AND CHALLENGES FOR THE FOW BOARD OF DIRECTORS

The bold vision for growth charted in this plan is one that can only be fully realized with the guidance and active participation of our Board of Directors. The Board will focus on multiple key areas to implement this plan: leveraging their connections and resources to meet our financial goals; forming and setting goals for our marketing committee; actively representing the organization to build our membership and volunteer resources; providing a bridge between FOW and our targeting partner organizations through reciprocal Board membership; and building the Board's own internal diversity and competencies through targeted Board recruitment.

During this five- year period the Board via committees will review existing policy for staff, Board and volunteer handbooks; shape or update financial policies and practices; and review nonprofit best practices through their own experience, research, and networks to ensure the highest level of transparency and service in the organization's operation.

Over the next five years, the FOW Board will focus on meeting our financial targets, marketing the organization, building membership and volunteerism, collaborating with peer organizations, and building Board diversity

STAFFING AND ORGANIZATIONAL STRUCTURE

Staff size may grow moderately (from 8 FTE to as much as 10 FTE, as driven by programming needs) in this planning period, and we will expect to utilize consultants and contractors to help manage workflow as we strive to meet the program, revenue, and membership growth goals we have set. We anticipate investing the organization's resources in training opportunities and technological supports, and we expect to see changes in reporting structure and the staff's daily activities and procedures. Staff roles and daily tasks will change to better capture evaluation metrics and accomplish programmatic goals, such as: implementing ongoing electronic communication plans via Facebook, Twitter, Tumblr, and other existing or emerging electronic media; creating GIS databased records of project sites; investing in software that allows us to track events, development activities, and project work with multi-year tracking. As growth of the volunteer program is central to the plan, we expect to dedicate more staff time and funding toward recruiting, training, and maintaining satisfaction for our volunteers. We expect

to see volunteer leaders who are not Board members become more active in leading the work and direction of the organization, particularly in our environmental education and habitat management efforts.

SHARED VALUES & ORGANIZATIONAL STYLE

The focus in this period will not be on growth of staff resources per se, but on ensuring that the staff has the resources needed to meet the objectives the Board has set for the organization. Reinforcing the existing staff culture of versatility, openness to new ideas, and a sense of long-term dedication to the Wissahickon is an important organizational implication of this plan. Similarly, building on and deepening the well-established Board culture of engagement, and ensuring ongoing continuity and clear communication between Board and staff is a critical need if we are to meet the objectives outlined in this document.

ORGANIZATIONAL SYSTEMS

Periodic external review of projects, beginning with STI, may be employed as early as 2014 to evaluate both the success of the program and to make additional recommendations as to program needs or to suggest areas of improvement. Board oversight of program and project work should extend to deeper understanding of programming through improved reporting and stronger interactions between the Conservation Committee and key program staff. We will invest in development and marketing systems to achieve a 100% increase in dues paying members in this planning period and seek to add another \$100,000 annually in unrestricted revenue by the end of the planning period. Board committees will adapt to support these goals, with more emphasis to be added to the need for both constituent engagement and education in all of our programming.

The vision for FOW in this period is of a flexible and pragmatic organization, able to adapt to the needs of the Wissahickon and new opportunities as they arise. This "positive opportunism" requires us to maintain a fluid asset base and not create rigid staffing requirements or organizational overhead that limits future mobility or burdens the organization with excess liability.

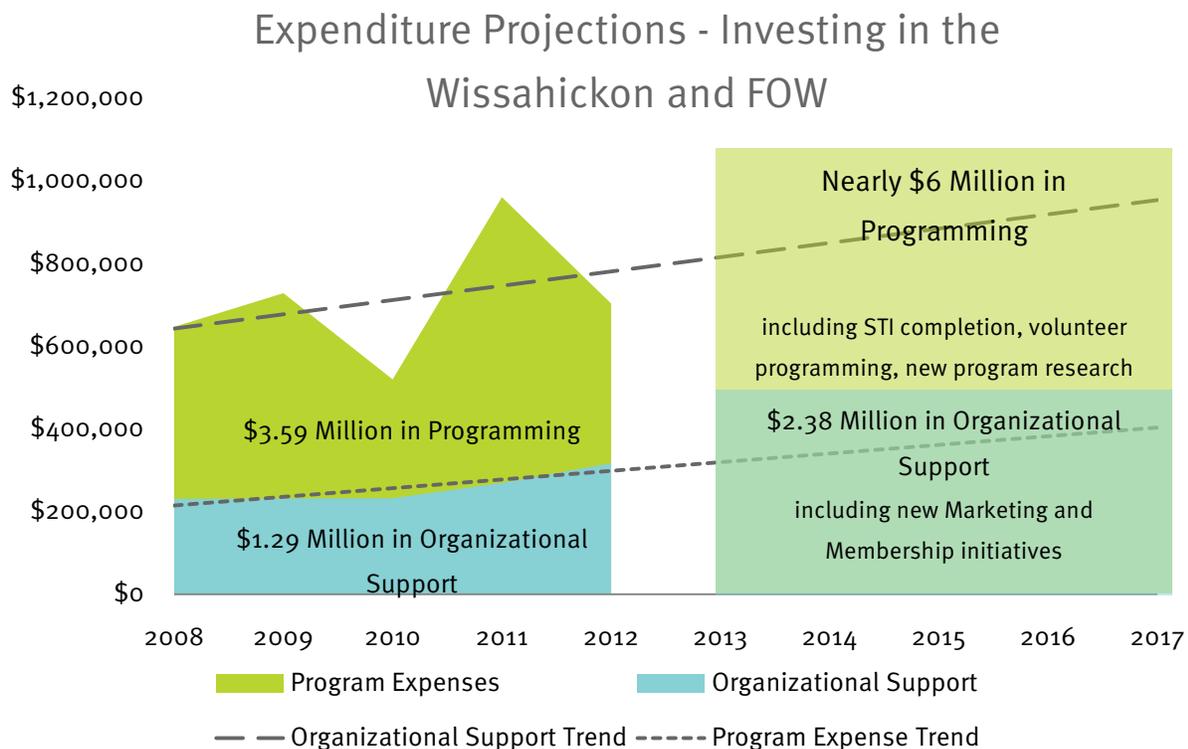
KEY ACTIONS & TIMEFRAMES

- 2013** Renew Board commitment to Sustainable Trails Initiative and STI campaign; Integrate Facebook, Twitter, Tumblr with workdays and Advocacy initiatives; use new online database to track project progress, events, training- and member activities; approve volunteer handbook and distribute to volunteers; update financial and investment policies; complete volunteer training guide and set new volunteer programming goals; set Board goals for marketing project
- 2014** Integrate FOW's 90th Anniversary celebration year with marketing & membership goals; convene Board marketing working group; make Volunteer Coordinator role full time; add possible additional staff or consultant roles to implement membership plans, 90th Anniversary activities, and/or marketing plans; external evaluation of programming begins; review and update Board handbook
- 2015** Complete full marketing plan and begin implementation; revise staff handbook; complete plan to diversify Board representation using multiple diversity criteria

FINANCIAL OBJECTIVES

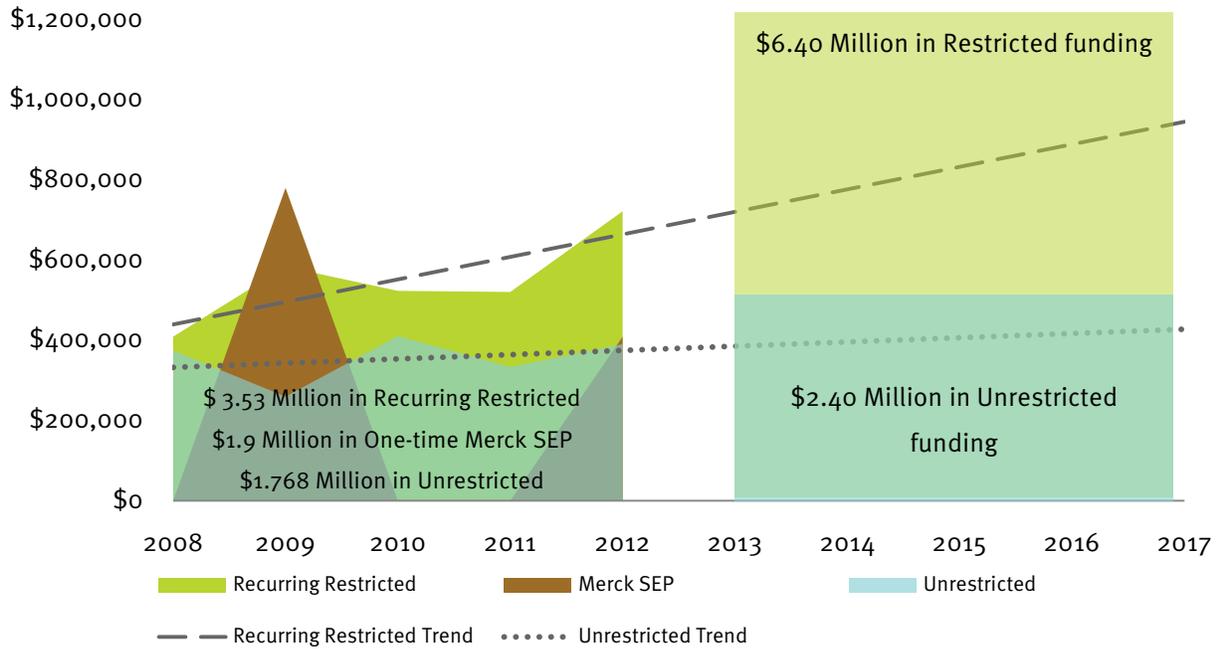
The work described in this planning document presents a vision for intensifying our program scope and increasing our capacity as an organization, which will also require a leap in the scope of funding for our work. Funding 80% of the capital project completion of the Sustainable Trails Initiative is the single costliest aspect of this plan, but the objective of broadening constituency and membership also carries a substantial investment in both the initiation of a marketing campaign, investment in development activities, and investment in staffing.

The chart below shows how the planned future program initiatives and investment in FOW’s capacity in this five-year plan compare with actual expenditures in the last five-year planning period. FOW’s approach has been to gather resources in one year for expenditure in a subsequent program year. The exact timing of programmatic spending tends to be driven by external factors such as planning finalization with partner agencies (e.g., PWD, PPR), contractor availability or permitting process (with PWD, PA-DEP, or US Army Corps of Engineers). Although the expenditure projections are shown in a five-year lump sum in the projection below, we believe that as in the past we will see substantial year-to-year variation in programmatic activity expenditures, but a steady increase in the organizational/capacity activities. Both our programmatic and capacity-building activities and expenditures are expected to see substantial increases throughout this planning period, and building a Board designated reserve fund to maintain projects beyond the timeframe of this plan is a part of our financial goal for this period.



Our Strategic Objectives set the goals for our fundraising activity for the next five years: \$6.4 million must be raised for the completion and stewardship of STI capital improvements over the next five years, a portion of which is planned to go toward the Board-designated reserve fund; of that amount, we would expect to spend as much as \$30,000 of the STI funds raised in a given year for work related to setting long-term habitat and watershed restoration goals of the STI program; and we will pursue \$100,000 additional per year in additional unrestricted

Revenue Objectives - Supporting the Vision



funds set as a target for unrestricted revenue (primarily through expansion of membership). The work outlined in Strategic Objective #3 is expected to contribute to meeting some of the revenue goals mentioned above. Marketing efforts are intended to increase membership by 100% over 2012 numbers. The action item related to increasing regional and national reach is predicated on obtaining national funders for signature program work, and so would support increases in the programmatic revenue line. Our funding history suggests that income may be unevenly distributed year-on-year as we pursue our overall funding goals for the period. The chart above shows trendlines based on past revenue performance, isolating large, non-recurring revenue awarded by Merck’s Supplemental Environmental Project (SEP) fund through a competitive application process as part of an Environmental Protection Agency/Department of Justice settlement of an enforcement actionⁱⁱ. During this planning period, the Budget and Finance Committee is charged with reviewing the investment strategy for FOW’s reserve funds, and ensuring that investment income is maximized during this period. The Valley Green Inn and Executive Committees will explore the contractual relationships surrounding Valley Green Inn, on which FOW holds a long-term lease. Setting renewal terms for that lease will be an important part of FOW’s long-term financial planning, as we anticipate substantially increasing FOW’s investment in the facility and its immediate environment over the next five years.

KEY ACTIONS AND TIMEFRAMES

2013 Begin second installment of STI campaign with Board commitments; Budget & Finance Committee investment policy review; continue lease discussions with Fairmount Park Historic Trust

2013 – 2018 Raise \$6.4 million to support the work of the Sustainable Trails Initiative using individual, local, and national foundation, state, federal, and corporate support; Increase unrestricted revenue by an additional \$100,000 annually by 2018

APPENDIX A: CHART OF OBJECTIVES AND ACTIONS

Action	Leadership (P= Primary Lead, S=Secondary)				Year	Financial Impact Thru 2018
	Board	Committees	Staff	Partn/Consult.		
Strategic Objective #1 - EVOLVE THE SUSTAINABLE TRAILS INITIATIVE						\$6.4 million fundraising target
1-1 Detail and cost remaining scope of implementation		S	P	S	2014	
1-2 Open Volunteer Leadership training program to key partners			P	S	2016	
1-3 Complete written plan for integration of select STI elements into core programs		S	P		2017	
1-4 Complete 80% of capital work detailed in 1-1		S	P	S	2018	
Strategic Objective #2 – FOSTER NEW PROGRAMS IN HABITAT & WATER QUALITY						Up to \$150,000 through planning period
2-1 Deepen partnerships with key organizations (WVWA, PPR, PWD)	P		S	P	2014	
2-2 Establish standards for the "PSI Plus" and volunteer training component		P	S		2015	
2-3 Complete online Wissahickon Watershed resource center; research national models of watershed redevelopment		S	P	S	2016	
2-4 Complete written plan for future programming on habitat and water quality		P	S		2018	
Strategic Objective #3 – BROADEN OUR CONSTITUENCY AND SCOPE						Up to \$190,000 on marketing plan & implementation
3-1 Form Board working group on Marketing		P	S		2014	
3-2 Complete and implement new Marketing Plan		S	P		2015	
3-3 Leverage volunteer program into partnership opportunities with other watershed entities	S		P	S	2016	
3-4 Initiate a relationship with at least one new national level funding organization	S		P		2017	
3-5 Expand the membership base by 100% and increase volunteer output by 50% from 2012	S	S	P		2018	

Action	Leadership (P= Primary Lead, S=Secondary)				Year	Financial Impact Thru 2018
	Board	Committees	Staff	Partn/Consult.		
ORGANIZATIONAL IMPLICATIONS						Raise an additional \$100,000 annually on management & operational costs
4-1 Renew Board commitment to Sustainable Trails Initiative and STI campaign	P				2013	
4-2 Integrate Facebook, Twitter, Tumblr with workdays and Advocacy initiatives			P		2013	
4-3 Use new online database to track project progress, events, training, and member activities internally			P		2013	
4-4 Volunteer handbook approved and distributed to volunteers; financial and investment policies updated; volunteer training guide completed and new volunteer programming goals set	S		P		2013	
4-5 Set Board goals for marketing project	P	S			2013	
4-6 Integrate FOW's 90 th Anniversary celebration year with marketing & membership goals	S		P		2014	
4-7 Convene Board marketing committee	S	P			2013	
4-8 Make Volunteer Coordinator role full time; possibly add other contract/employee roles to support objectives		S	P		2014	
4-9 Begin external evaluation of programming	S	P	S		2014	
4-10 Complete and implement full marketing plan	S		P	P	2015	
4-11 Complete Board plan to diversify Board representation	S	P			2015	
FINANCIAL OBJECTIVES						Board, staff, and members to raise \$6.4 million for programs and maintenance
5-1 Begin second installment of STI campaign with Board commitments	P					

Action	Leadership (P= Primary Lead, S=Secondary)				Year	Financial Impact Thru 2018
	Board	Committees	Staff	Partn/Consult.		
5-2 Continue lease discussions with Fairmount Park Historic Trust		P	S	P		
5-3 Raise \$6.4 Million to support the work of the Sustainable Trails Initiative using individual, local, and national foundation, state, federal, and corporate support	P		P			
5-4 Increase unrestricted revenue by over \$100,000 annually by 2018	S		P			

APPENDIX B: LIST OF PARTICIPANTS IN THE PLANNING PROCESS

The following FOW Directors participated in this planning process:
(* = past Board member)

Cindy Affleck
David Hilton
Bettina Hoerlin
Bob Harries
Courtney Kapp
Bob Lukens*
Charlie Lee
Cindy Heckscher
Daphne Fifield
David Dannenberg*
David Pope
Dick Brown
Emily Daeschler
Gene Caffrey*
Heidi Grunwald
Jack Kelly
Jeff Harbison
John Meigs
John Rollins
Liz Pearson
Liz Werthan
Louise Johnston
Martha Kennedy
Melen Boothby
Richard Kremnick
Sam Finney
Jerome Maddox
Shirley Gracie
Stephanie Craighead
Will Whetzel

The following individuals participated in discussions or interviews with FOW representatives that were integrated into this plan:

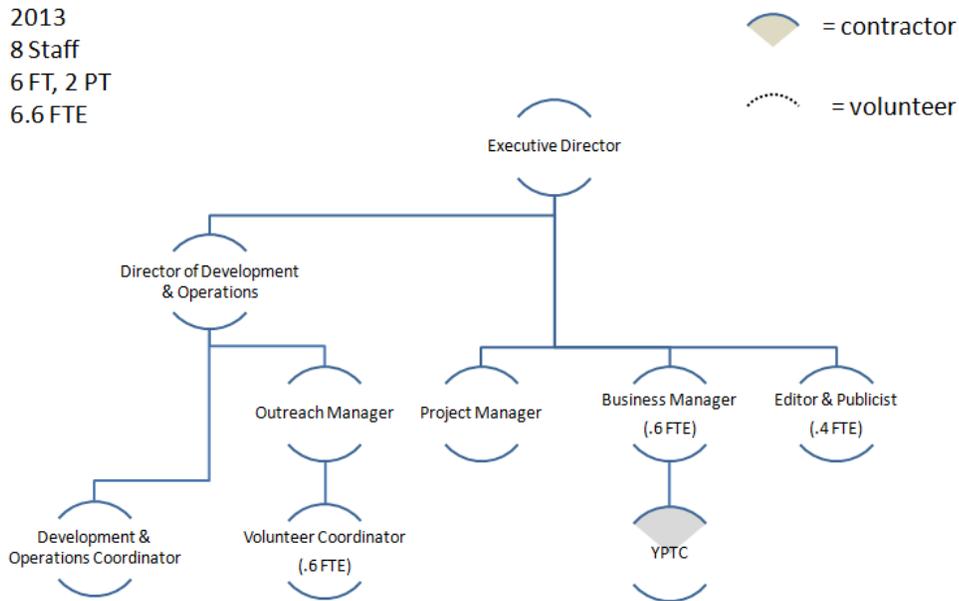
Michael DiBerardinis, Deputy Mayor for Environmental and Community Resources for the City of Philadelphia and Commissioner of the Department of Parks & Recreation
Chris Crockett, Deputy Commissioner of Planning & Environmental Services at Philadelphia Water Department
Glen Abrams, Strategic Policy and Coordination at Philadelphia Water Department

Christine Knapp, Director of Strategic Partnerships at Philadelphia Water Department
Joanne Dahme, General Manager of Public Affairs at Philadelphia Water Department
Andrew Johnson, Program Officer at the William Penn Foundation

Representatives from the following agencies and organizations were invited to provide confidential feedback on the planning process using an online survey instrument:

Audubon Pennsylvania
Chestnut Hill College
Chestnut Hill Historical Society
Crefeld School
Delaware River Basin Commission
Delaware Valley Planning Commission
Germantown Academy
Germantown Friends
Green Tree Charter School
Hill at Whitemarsh
Linglebach Elementary
Manayunk/East Falls Development Corporations
Montgomery County Planning Commission
Morris Arboretum
Natural Lands Trust
New Covenant Campus
PA Fish & Boat Commission
Partnership for the Delaware Estuary
Pennsylvania Environmental Council
Philadelphia Parks & Recreation (PPR)
Philadelphia Planning Commission
Philadelphia University
Philadelphia Water Department (PWD)
Saul High School
Schuylkill Action Network
Schuylkill Center for Environmental Education
Springfield Township
Springside School/Chestnut Hill Academy
Temple University-Ambler Center for Sustainable Communities
Whitemarsh Foundation
Whitemarsh Township
Wissahickon Charter School
Wissahickon Environmental Center (PPR)
Wissahickon Valley Watershed Association
Wissahickon Watershed Partnership (PWD)

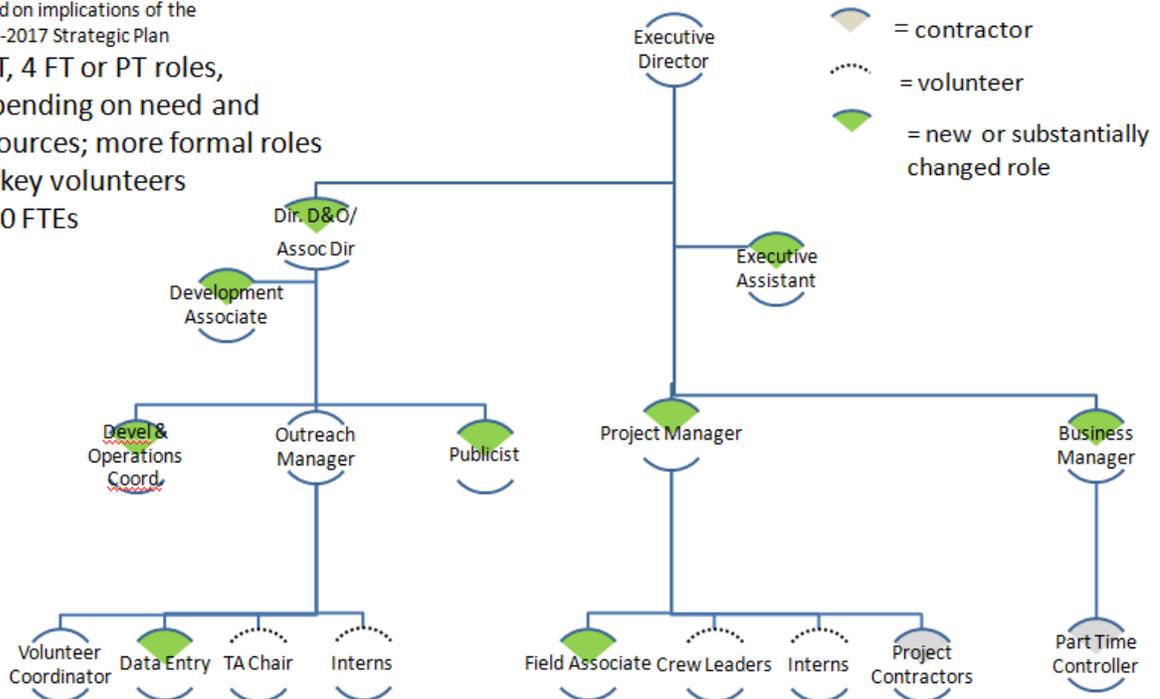
APPENDIX C: CURRENT AND FUTURE STAFFING MODELS



2017 (Possible)

One possible future staffing model based on implications of the 2013-2017 Strategic Plan

6 FT, 4 FT or PT roles, depending on need and resources; more formal roles for key volunteers
 8-10 FTEs



ENDNOTES

ⁱ The Plant Stewardship Index (PSI) is a tool specifically developed to evaluate the ecological integrity of native plant communities in the Piedmont region of Pennsylvania, and in New Jersey. Based on the Floristic Quality Assessment Index (FQAI) methodology developed in Chicago for the assessment of prairie restoration, the FOW Conservation Committee has employed the PSI as a habitat quality index since 2008 at major capital project worksites in the Wissahickon. In 2012 they proposed further refining the PSI program to capture information for maximum effect in a more standardized fashion. The “PSI Plus” is expected to include, at each project site: plant evaluation according to the new PSI standards set by Bowman’s Hill Wildflower Preserve; wildlife sentinel species counts; soil assessments; and visual canopy assessments.

ⁱⁱ In November 2009 Merck & Co., Inc., awarded the Friends of the Wissahickon (FOW) \$780,656 for their Wissahickon Stormwater Mitigation and Sediment Reduction Project, part of the Sustainable Trails Initiative. This two-year project, in partnership with the Natural Resources staff of Fairmount Park, reduced sediment, improved water quality, protected drinking water sources, and enhanced the Wissahickon watershed habitat. This project was undertaken in connection with the settlement of an enforcement action, United States & PADEP v. Defendant Merck & Co., Inc. In 2007, the company agreed to a \$20 million settlement and to fund projects dealing with stream restoration, sediment reduction, habitat restoration, or wetlands restoration. In 2012 an additional \$409,000 was awarded to FOW from the remaining funds in the Supplemental Environmental Project Fund for additional improvements at already approved project worksites. Despite the second pool of funding made available to FOW, this should not be considered a recurring funding source.



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