

# STRATEGIC PLAN 2020-2023



# INTRODUCTION

The decision to embark on a strategic planning process this year wasn't due only to the Covid-19 pandemic. As we celebrated our 25th anniversary of successful bird conservation, we thought it was a good time to reflect on our history, explore the world we are now living in, and ensure our resources and efforts are directed toward what matters most, what is needed most, and what we are best able to achieve.

It was an exercise, not just in *where* we are going, but *how*. Our intent was to ensure our capacity to thrive, to be resilient, and to think strategically for the short and long term. Perhaps the pandemic did propel us to a degree, after all, as it showed us the importance of being able to respond to unexpected challenges and to events outside our control, but affecting us mightily.

Not wanting to use our scarce resources on consultants, we asked ourselves the critical and hard questions. We dug down on our purpose, questioned who our stakeholders are, what success looks like, what strengths we have to build on, and what we can and, should, let go of. And perhaps most importantly, what the values are that drive us, that we will live by.

This plan is a living document. It will evolve as we evolve and it will guide us in our annual planning process, our day-to-day actions, and our assessment and definition of success.

# MISSION AND VISION

## MISSION

Prince Edward Point Bird Observatory (PEPtBO) is a registered charity with a mandate to monitor, report on, and promote analysis of bird migration and to act as official caretaker of the Prince Edward County South Shore Important Bird and Biodiversity Area (IBA).

## VISION

In our vision, we contribute to bird populations that are resilient and robust, and a natural world that is sustainable for future generations.

Birds matter to the healthy survival of the planet. What we learn from migrating birds can support biodiversity and the ecosystems that sustain us, but birds are facing accelerating threats, particularly through migration. We need to act quickly and collectively to protect birds and the places they need while we still can. The scientific data PEPtBO collects contributes to local, national and international action to protect and manage key habitat and to reduce threats along migratory pathways. And our advocacy and educational programs encourage avian conservation action and support for nature. We support the future by acting now.

# GUIDING PRINCIPLES

- Birds help us understand the living world. We believe that transforming science to action will contribute to the long term survival of birds and the overall health of our ecosystems and environment.
- We put birds first. We are guided by the Banders Code of Ethics which details our practice and commitment to bird safety at all times.
- We believe that connecting people to the joy of birds through education and hands-on exposure will ignite a lifelong passion for nature, leading to support for environmental conservation and a new generation of advocates.
- As stewards of the Prince Edward County South Shore Important Bird and Diversity Area (IBA), we recognize our responsibility to respect and protect the abundant and diverse wildlife residing there.
- We recognize that working in partnership with other conservation organizations and all levels of government will further our goals and increase our impact.
- We are led through the passion, knowledge, skills, and experience of volunteers, and are committed to providing appropriate recruitment with ongoing training, support and recognition.
- We are committed to inclusiveness in all that we do and will work to improve representation, tolerance and opportunity benefitting all racialized groups, Indigenous Peoples, LGBTQ+communities, genders and persons of differing abilities.
- We use our resources and manage our organization effectively, efficiently and with fiscal responsibility and strategic intent.

# SWOT ANALYSIS

The SWOT analysis provides a way to look at the current state by identifying both internal and external perspectives. The purpose of the SWOT is to help align PEPtBO's resources and capabilities to the requirements of the environment we operate in.

## Internal Strengths

- . 25 years history and good reputation
- . Committed board members provide a diversity of skills, knowledge and experience
- . Limited but stable and diversified financial resources
- . Able to engage the public in science in action
- . We are a door to nature. PEP is an extraordinarily abundant natural site
- . Experience in successful educational and fundraising events
- . Deep loyalty among its supporters
- . Range of volunteers able to assist with programs and outreach
- . Large amounts of data already collected
- . Endowment fund

- . We have the last undeveloped shoreline in Southern Ontario and existing partnerships to protect it
- . Covid-inspired interest in nature and birdwatching could generate more involvement and support for conservation and PEPtBO.
- . We have a strong case for our contribution to PEC's economy
- . The growing population in PEC could increase our fundraising base and influence on issues of concern
- . We are well connected to academic and strategic institutions who can assist us to further our reach
- . We have partners with resources and mandates that can enhance our capacity to meet our objectives

## Internal Weaknesses

- . Challenges in data quality, systems and reporting
- . Difficulty in recruiting competent professional banding staff
- . No full time staff limit continuity and focus on research and data
- . Reduction in volunteers
- . Covid has limited public access and our ability to program
- . The board is overstretched with potential for burnout.
- . The board lacks a cohesive vision and process to define clear goals and action
- . Our membership is small and aging and we have not had the resources to manage or grow it
- . Committee structure is not leading to coordinated strategic direction
- . Our stakeholder databases are inefficient

- . Climate change, habitat loss, and changes in farming practices have contributed to declines in bird populations.
- . Overdevelopment/commercial/recreational pressures around the NWA could lead to congestion and degradation of habitat.
- . Inability to enforce reasonable use of fragile habitat can lead to environmental degradation of our site.
- . Increased invasive plant species could damage the ecological balance necessary to support birds.
- . Sectoral competition among key PEPtBO partners could reduce collective strategic intent.
- . Post-covid macro-economic constraints and increased social needs could reduce the priority of bird and conservation issues in funding and public policy.

## External Opportunities

## External Threats

# CRITICAL SUCCESS FACTORS

## WHAT WE NEED TO ACHIEVE OUR GOALS

- Adequate skills, systems, protocols and equipment for the generation of high quality data and reports.
- Skilled full-time BIC and resources for developing trained volunteers.
- Secure funding for core operations and capacity to raise funds for programs.
- Public and government commitment to conservation and environmental issues and PEptBO's capacity to influence them on its own or with others.
- A broad base of public awareness, support and engagement for our work.
- A committed, competent and collaborative working board of directors.
- Clear, targeted communications systems and policies that inform and engage stakeholders, and advance the priorities and capacity of PEptBO.



# STRATEGIC PRIORITIES

## ONE: Research, banding and training

- Contribute to continent-wide efforts to protect avian species at risk and common birds by monitoring the status and trends of resident and migratory bird populations at PEP in an ethical and scientifically rigorous manner.
- Provide comprehensive basic and advanced banding training for interns, students and volunteers to increase the number of qualified banders available to PEPtBO and other banding stations.
- Conduct public demonstrations where people of all ages can learn about bird identification, migration ecology and the importance of conservation.
- Produce an annual and public report detailing the results of PEPtBO's work including any key learning or actions recommended.

## TWO: Public education

- Help build the next generation of conservation leaders by engaging and inspiring young people to explore nature and understand the important roles birds play.
- Tap into the public's enthusiasm for birds by offering resources and events to discover the joy of birds and birding and a recognition of the perils facing them.

# STRATEGIC PRIORITIES

## THREE: Environmental stewardship and advocacy

- Serve as caretaker for the IBA to protect its capacity to provide habitat for successful nesting, wintering and migration of birds as well as other creatures residing there.
- Protect and further the interests of resident and migratory birds in the Prince Edward County South Shore Important Bird and Biodiversity Area (IBA) by building public support and influencing effective public policy.

## FOUR: Organizational capacity building

- Implement a focussed and comprehensive fundraising strategy to fund operations and programs that assess the cost/benefit of all initiatives and have criteria and a process for approval.
- Using analytics and evaluation tools, annually review programs and communications to ensure they are effective at moving people to deeper engagement, more joy, and action.
- Create and implement a communications strategy that ensures all internal and external communication messages, objectives and platforms are consistent and coordinated to promote the purpose and objectives of PEPtBO to its stakeholders and the public.
- Develop and monitor board processes, policies, structure and communications to encourage a culture of trust, respect and productivity.





## 2020/21 BOARD OF DIRECTORS

**President: Julie White**

**Vice-President: John Hirsch**

**Past President: Cheryl Anderson**

**Secretary: Lisa Martell**

**Treasurer: Dale Boyd**

### DIRECTORS:

**Nick Bartok**

**Kathy Felkar**

**Ketha Gillespie**

**Brian Joyce**

**JoAnne Sulzenko**

**Helene Tremblay**

**Lindsey Van De Keere**

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