

# Roaring Fork Conservancy 2007 Business Plan

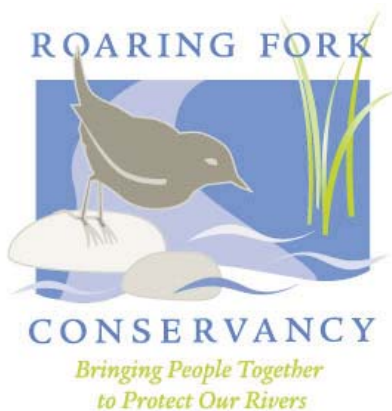


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# **2007 BUSINESS PLAN**

**Rick Lofaro**  
*Executive Director*



**Roaring Fork Conservancy**

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Cover Photo: Robin Henry

The namesake of the Roaring Fork Valley is a 70-mile-long ribbon of pristine, scenic water that starts as a trickle at 12,900 feet before pouring into the mighty Colorado River. The Roaring Fork River and its numerous tributaries are woven through the fabric of the Valley's communities and are a major asset to our economy and quality of life. They are the heart and soul of our watershed.

Roaring Fork Conservancy's mission is "to inspire people to explore, value and protect the Roaring Fork Watershed". A watershed is defined as an area of land where all the water drains to one point, and in our case, that point is the Colorado River at Glenwood Springs. John Wesley Powell put it well when he said, "[a watershed] is that area of land, a bounded hydrologic system, within which all living things are inextricably linked by their common water course and where, as humans settled, simple logic demanded that they become part of a community." The Roaring Fork Conservancy works to engage our fellow community members in protecting the Roaring Fork Watershed.

We address the needs of our watershed in different program areas: conservation, water quality, research and education. As a non-profit organization we rely on the generosity of numerous donors, grantors and foundations. The 2007 business plan provides a source of information about Roaring Fork Conservancy, our efforts and our goals for the upcoming year.

This year marks the beginning of our second decade of watershed protection. As the executive director, I am excited to lead Roaring Fork Conservancy into the next decade of outstanding work. We look forward to another successful year of preserving and protecting the Valley's rivers.

Report on organizational support and growth

Give an overview of the organization

Review 2006 goals and accomplishments

Present the 2007 budget

Establish goals for 2007

Describe new initiatives to be undertaken in 2007

## **1. PURPOSE OF THE BUSINESS PLAN**

### **Mission**

To inspire people to explore, value, and protect the Roaring Fork Watershed.

### **Core Values**

Roaring Fork Conservancy is an organization that strives in all its endeavors to be pro-active, non-biased, science-based, and collaborative on issues pertaining to water in the Roaring Fork Watershed.

## **2. MEASURES OF SUCCESS**

# 3. CURRENT CONDITIONS

## Board of Directors

	Date Joined Board
Diane Schwener, <i>President</i>	June 2001
Ramsey Kropf, <i>Secretary</i>	May 2003
Carter Brooksher, <i>Rivers Council Liaison</i>	September 1998
Stephen Ellsperman, <i>Vice President</i>	January 2004
Jeff Jones, <i>Treasurer</i>	January 2007
Jim Light	October 1996
Rick Lofaro	June 2005
Louis Meyer	December 2006
Rick Neiley	November 2000
Larry Yaw	December 2006

## Program Staff

	Date Hired
Patricia Chew, <i>Bookkeeper</i>	June 15, 2004
Sharon Clarke, <i>Water Resource Specialist</i>	June 1, 2004
Catie Fleming, <i>Development Assoc./OM</i>	August 22, 2006
Carlyle Kyzer, <i>Major Gifts Director</i>	October 1, 1998
Rick Lofaro, <i>Executive Director</i>	February 1, 1999
Tim O'Keefe, <i>Education Director</i>	August 15, 2001
Ed Perregaux, <i>Development Director</i>	August 1, 2006
Chad Rudow, <i>Water Quality Coordinator</i>	August 15, 2006

## Rivers Council Executive Committee

Bill Gruenberg, *President*  
Harry Auger  
Carter Brooksher  
Dennis Cirillo  
Kathy & Bob Courson  
Jim Eroncig  
David Finholm  
Joyce Gruenberg  
Ken Kendrick  
Richard Kipper  
Meredith Long  
Jan Peterson  
Robert Woods

*As of January 30, 2007*

## 2006 By The Numbers

### Program Areas

#### Land Conservation

Total Number of Acres Protected	227.7
Total Land Conservation Easements	9
New Easement Acreage Added	0

#### Watershed Education

Education Contacts	5,196
Adult Programs	42
Participating Schools	13
Total Newsletter Readership	5,100
Website Sessions	73,844

#### Water Quality Monitoring

Water Quality Sampling Stations	24
Samples Taken	200
New Volunteer Monitors	5

#### Water Resources Research

Reports Published	3
Stream Flow Survey Report	
2006 Roaring Fork Watershed Water Quality Report	
Macroinvertebrate Community Response to Winter Flows on the Fryingpan River	

#### Development

Email List Subscribers	1,109
Mailing List Subscribers	2,607
Rivers Council Members	83
Total Donors	411

## **4. ORGANIZATION OVERVIEW**

Roaring Fork Conservancy is the watershed conservation organization in the Roaring Fork Valley that brings people together to protect our rivers.

*Our mission:*

**To inspire people to explore, value and protect the Roaring Fork Watershed.**

*We are focused on:*

**Water Quantity** — keeping water in our rivers,  
**Water Quality** — keeping our rivers healthy,  
**Habitat Preservation** — keeping our riparian habitat intact.

*RFC Programs that address these issues:*

### **Watershed Education**

Promotes understanding and stewardship of water and riparian resources through classroom and outdoor educational programs with students and adults.

### **Land Conservation**

Acting as a land trust, this program conserves critical riparian habitat through conservation easements while maintaining responsible public access.

### **Water Quality Monitoring**

Collects and reports scientific water quality data to the State of Colorado through a network of volunteers at 24 water sample stations throughout the watershed.

Performs targeted studies on stream sections of concern.

### **Water Resources Research**

Researches water issues within the Roaring Fork Watershed, including: economic use, fisheries and habitats, storm water, and stream flows. Acts as a voice for riparian resources (rivers, wetlands, lakes) within the watershed to decision-makers and citizens.

## **5. 2006 GOALS REVIEW**

The 2006 Goals listed below were established in January of 2006. The activity status is presented as of December 2006. The goals established for 2006 are divided into two categories: organizational and individual program areas.

### **Organizational**

#### **Hire Development Director.-**

PI - Hire development Director by February 1, 2006.  
*100% - Ed Perregaux hired August 1, 2006.*

#### **Hire Land Conservation Director.**

PI - Hire Land Conservation Director by April 1, 2006.  
*0% - Worked to secure a conservation fellow through CCT in 2006. Found a fellow who could start in June 2007 to fill this position.*

#### **Create a strong branding, public relations, and marketing mechanism.**

PI - Create branding theme and public relations protocol by May 30, 2006 and pursue Conservancy retail/marketing materials by December 31, 2006.  
*100% - Branding synopsis and logo work complete; implementation in 2007.*

#### **Increase presence and work with Roaring Fork Watershed Collaborative.**

PI - Work more closely with Collaborative subcommittees and workgroups to utilize research and provide public outreach by December 31, 2006.  
*100% - RFC has taken active role in stakeholder outreach, initiating the state of the watershed report, and coordinating activities of subcommittees.*

#### **Improve database.**

PI - Research, purchase and transfer entries into new donor database by March 15, 2006.  
*100% - New database, eTapestry, online and in-use December 31, 2006. Updating and website integration needed in 2007.*

### **Development**

#### **Create a development plan and improve the budget.**

PI - Reformat and simplify budget format, balance budget, and create a development plan by May 31, 2006.  
*67% - New format and balanced budget complete; development plan nearly finalized.*

#### **Move forward on capital campaign.**

PI - Move forward on capital campaign by implementing action items on the campaign timeline by December 31, 2006.  
*100% - Capital Campaign on schedule.*

### **Watershed Education**

#### **Maintain strong school-based education presence.**

PI - Teach over 3,500 students at 10 schools about watershed topics by December 31, 2006.  
*91% - Taught 3,196 students at 13 schools.*

**5.  
2006  
GOALS  
REVIEW**  
continued

**Increase adult education and community outreach opportunities.**

PI - Pursue and conduct twenty adult education and community outreach presentations and/or events, and produce three educational materials for distribution by December 31, 2006.

*185% complete - 38 adult programs conducted; 2 newsletters and Keep It Clean materials completed.*

**Foster funding and implementation collaboration on the Keep It Clean campaign.**

PI - Find supporting partners and create campaign materials by May 31, 2006.

*100% - Eleven KIC partners working with RFC to promote campaign.*

**Land Conservation**

**Maintain and monitor existing conservation easements and pursue new easements.**

PI - Complete action item list for easement maintenance and monitoring by December 31, 2006.

*75% - Monitoring plan in place and working, action item list 50% complete.*

**Water Quality**

**Synthesize and report Water Quality data.**

PI - Assist USGS with Roaring Fork Retrospective and complete the 2006 Water Quality Report by December 31, 2006.

*50% - USGS not completed. Roaring Fork Watershed Water Quality Report published in October 2006.*

**Perform targeted studies on stream sections of concern.**

PI - Pursue funding and areas of concern by May 31, 2006.

*100% - Brush Creek study initiated to study pH levels; Crystal River Stream Gage installed to monitor low flows; will conduct other targeted studies in future years.*

**Water Resources Research**

**Pursue Roaring Fork Watershed Plan**

PI - Pursue funding, support and production of a Roaring Fork Watershed Plan by December 31, 2006.

*100% - The Roaring Fork Watershed Collaborative has secured \$110,000 in funding for Watershed Plan; began stakeholder outreach, prepared for state of watershed report to be completed in 2007.*

**Complete Stream Flow Survey Project**

PI - Complete stream flow survey project and work to utilize research by December 31, 2006.

*75% - Stream Flow Survey report published in January 2006. Waiting for final data to complete analysis.*

*PI = Progress Indicator*

## **6.** **2006 ACTUALS**

### **Support & Revenue Expenses**

#### Support & Revenue

##### **Donations**

Individual Donations	136,563
Real Estate Transfer Assess.	66,766
Watershed Adoption	200
<i>Total Donations</i>	<i>203,529</i>

##### **Grants**

<i>Total Grants</i>	<i>47,110</i>
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##### **Earned Income**

Conservation Easements	11,678
Consulting Fees	3,750
Easement Monitoring	22,286
Events	325,283
Water Quality	8,302
Interest Income	9,388
<i>Total Earned Income</i>	<i>380,687</i>
<b>Total Revenue</b>	<b>638,931</b>

#### Expenses

##### **Programs**

Education	91,323
Water Quality	52,176
Land Conservation	6,643
River Stewardship	103,527
Water Quality Resources	58,120
Program Support	80,656
Other	1,691
<i>Total Program Expenses</i>	<i>400,068</i>

##### **Fundraising**

<i>Total Development/Fundraising</i>	<i>19,329</i>
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##### **Administration**

Accounting	17,890
Administration	37,894
<i>Total Administration</i>	<i>55,784</i>
<b>Total Expenses</b>	<b>554,382</b>

# 7. 2007 BUDGET

	General Administration	Fundraising & Development	Land Conservation	River Stewardship	Education Water Quality	Research	Totals
<b>Income</b>							
Donations	500	100,000	-	-	-	-	100,500
Grants	2,500	22,500	19,000	-	7,500	112,750	164,250
RFC Contr.	-	50,000	-	-	-	-	50,000
Events	-	283,000	-	-	14,000	-	297,000
<i>Earned Income:</i>							
Easements	-	-	35,000	-	8,500	-	43,500
Interest	4,500	-	-	-	-	-	4,500
Program	-	-	5,000	4,000	12,000	-	21,000
<b>Income Totals</b>	<b>7,500</b>	<b>455,500</b>	<b>59,000</b>	<b>4,000</b>	<b>42,000</b>	<b>112,750</b>	<b>680,750</b>
<b>Expenses</b>							
<i>Payroll:</i>							
Director	35,500	35,000	24,000	57,750	44,000	42,500	238,750
Assistant	-	20,000	-	-	31,000	-	51,000
P/R Taxes	3,200	-	2,000	5,000	6,000	3,864	20,064
IRA Contrib.	750	-	750	1,100	1,500	900	5,000
Health Ins.	5,200	-	4,560	5,800	4,500	3,000	23,060
<i>Other Expenses:</i>							
Accounting	20,000	-	-	-	-	-	20,000
Bank Charges	2,500	-	-	-	-	-	2,500
Consultants	-	11,300	-	-	-	55,000	66,300
Equip/Supp.	23,000	-	-	-	4,000	6,300	33,300
Events/Prog.	3,400	80,000	-	-	10,000	-	93,400
Liability/WC	6,500	-	-	-	-	-	6,500
Marketing	-	10,000	-	30,000	-	-	40,000
Meals	300	1,000	-	1,000	300	400	3,000
Memberships	500	1,500	500	500	300	-	3,300
Mileage	250	1,000	500	1,500	2,500	1,500	7,250
Postage	4,000	5,000	-	-	-	-	9,000
Prof. Develop.	-	500	-	500	1,300	2,700	5,000
Rent	41,500	-	-	-	-	-	41,500
Tele/Utilities	5,200	-	-	1,200	500	1,100	8,000
<b>Expense Tot.</b>	<b>155,300</b>	<b>165,300</b>	<b>32,310</b>	<b>104,350</b>	<b>105,900</b>	<b>117,264</b>	<b>680,424</b>
<b>Income Total</b>							<b>680,750</b>
<b>Expense Total</b>							<b>680,424</b>
<b>Net Difference</b>							<b>326</b>

## **8. 2007 GOALS**

The goals established for 2007 are divided into two categories: organizational and individual program areas.

### **Organizational**

**Grow earned income, increase Rendezvous attendance and income, build Rivers Council memberships.**

PI – Increase Rendezvous net revenue 7%, build Rivers Council membership from 75 to 100, and increase funding in the earned income area to \$69,000 by December 31, 2007.

**Bring on a Colorado Conservation Trust fellow to head the Land Conservation Program.**

PI – Bring on Colorado Conservation Trust fellow by May 1, 2006.

**Implement branding outcomes including new messaging to key audiences, a new logo and style guide for Roaring Fork Conservancy (RFC) publications and materials, and purchase marketing materials which help promote the organization.**

PI – Reveal new logo and messaging through printed materials and website by May 31, 2007 and pursue Roaring Fork Conservancy retail/marketing materials by December 31, 2007.

**Increase presence and work with Roaring Fork Watershed Collaborative including but not limited to the Collaborative's Water Committee to initiate a watershed plan by writing the state of the watershed report and conduct coordinated education and outreach activities to stakeholders in preparation for writing the watershed plan.**

PI – In cooperation with other Collaborative members, complete the State of the Watershed report by December 31, 2007. Conduct 25 coordinated education and outreach activities in preparation for writing the watershed plan by December 31, 2007.

**Implement eTapestry by merging old database information from ebase and donor information from current tracking system (Excel spreadsheet and donor book) as well as purging unnecessary and/or incorrect information from eTapestry.**

PI – Initialize use of eTapestry as the new donor tracking system by March 15, 2007. Purge and correct information in the new database by December 31, 2007.

**Convene focus groups to assist with River Center planning and design. Use information gathered at focus group meetings to shape the program and design of the building while fostering community support for the Capital Campaign.**

PI – Conduct focus groups in several locations in the valley by March 15, 2007. Begin planning and design of the River Center by December 31, 2007.

## **8.** **2007 GOALS** continued

### **Strengthen volunteer network.**

PI – Begin entering current and new volunteer contact information into eTapestry by March 15, 2007. Begin using the website in conjunction with eTapestry to solicit new volunteers by December 31, 2007.

### **Development**

**Move forward with the Capital Campaign by conducting philanthropic market study of the River Center, meeting with potential donors and initiating the Capital Campaign. Incorporate the results of the studies into initial Capital Campaign fundraising.**

PI – Move forward on capital campaign by conducting philanthropic market study by May 31, 2007. Use the results of the studies to initialize Capital Campaign by December 31, 2007.

### **Watershed Education**

**Maintain strong school-based education presence and strong adult education opportunities.**

PI - Teach over 3,500 students at 12 schools about watershed topics and conduct 25 adult education programs by December 31, 2007.

### **Land Conservation**

**Maintain and monitor existing conservation easements and pursue new easements.**

PI - Complete action item list for easement maintenance and monitoring by December 31, 2007.

### **Water Quality**

**Establish new volunteers/stream teams.**

PI – Establish three new stream teams by December 31, 2007.

*PI = Progress Indicator*

### **Branding Implementation**

In 2006 we completed work on re-branding the organization; in 2007 we will implement the brand outcomes which include new messaging to key audiences, a new logo and style guide for Roaring Fork Conservancy (RFC) publications and materials, and purchasing marketing materials which help promote the organization.

### **Roaring Fork Watershed Collaborative**

A founding organization of the Roaring Fork Watershed Collaborative, RFC became more involved with the Collaborative's Water Committee in 2006. Staff will continue to work with committees within the Water Committee to look at initiating a watershed plan and conducting coordinated education and outreach activities to stakeholders in preparation for writing the watershed plan.

### **State of the Watershed Report**

A key component to writing the Roaring Fork Watershed Plan, the state of the watershed report will synthesize the dozens of research studies and information reports into one document. This document will then provide plan writers the most all-encompassing sources of information for each section of the plan.

### **Conservation Fellow**

RFC will bring on a Colorado Conservation Trust fellow to head the land conservation program.

### **River Center**

In 2007 RFC will convene focus groups to assist with River Center planning and design. These focus groups will help the organization shape the program and design of the building while fostering community support for the capital campaign.

### **Capital Campaign**

In the spring of 2007 RFC will conduct a philanthropy study to determine the feasibility of the River Center and its capital campaign. The study's results will then be incorporated into initial capital campaign fundraising in the summer of 2007.

### **New Database**

In 2006 RFC converted to eTapestry, its new database. In 2007 the organization will put the software to use through donor management and tracking, events scheduling, and website donation and data-entry interfaces.

### **Strengthen Volunteer Network**

In a given year RFC has over 150 volunteers cleanup rivers and collecting water quality samples. With the aid of our new database we will work to strengthen our already healthy volunteer network.

## **9. NEW INITIATIVES**

### **An Expanded Look at Our 2007 Goals**

