
Wisconsin Society for Ornithology

2024-2030 Strategic Framework

Approved by the Board of Directors on 04/20/2024

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Introduction

The Wisconsin Society for Ornithology (WSO or Society) began in 1939 with the mission: "...stimulate interest and promote the study of the birds of Wisconsin, especially in the field, and to bring together and permanently record accurate and authentic data relative thereto..."

The decades of the 1940s through the 1960s focused on, but were not limited to, avian education, research, and conservation practices. An Education Committee was formed to offer field trips and campouts and to teach bird awareness and identification skills. The incomparable Fred and Fran Hamerstrom brought the Greater Prairie Chicken decline to the forefront of conservation concerns. Realizing the need to embrace species protection, WSO revised its "Statement of Purpose" to reflect conservation activities.

Moving into the 1970s through the 1990s, WSO's focus included reducing hazards to birds, expanding the number of scientific papers and reports, and taking the lead in developing and publishing the state's first breeding bird atlas. WSO filed a lawsuit to stop the "pole-trapping" of birds of prey. Life-long WSO member and the "dean" of Wisconsin birds, the Rev. Samuel Robbins, Jr., published his seminal work, "Wisconsin Birdlife, Population and Distribution," an encyclopedic documentation of the state's history, abundance and habitat of every species recorded in Wisconsin. Also, WSO launched its first website, reaching a larger audience and furthering the mission.

In 2021, WSO hired an executive director and began the journey of professionalizing the organization. It did so by recognizing the value and continued reliance on volunteers, many of whom were instrumental in documenting birds throughout the state and providing annual counts in the state and in each county.

WSO has also been a critical partner in creating the Wisconsin Breeding Bird Atlas II, which is a statewide comprehensive survey that documents the distribution and abundance of our breeding birds.

Planning Process

The Society embarked on a planning process in July 2023 to set direction and hone priorities as it continues to evolve.

Stakeholder perspectives informed the process

A stakeholder engagement process was initiated to gather perspectives from members, volunteers, related representatives, and interested parties. Interviews were conducted with about 20 stakeholders who represented like-missioned organizations, conservation groups, long-term members, and past Board members.

An electronic survey was sent through email, social media, web postings, and word of mouth resulting in 350 responses with representation from across the state; of the respondents about 80% were members of whom 52% were members for 10 or more years. About 80% of respondents were over the age of 55 (61% over the age of 65 years).

Following are themes from the survey:

- 85% of respondents believed the organization was effective in advancing its stated intention, yet many respondents offered comments noting apathy on their part for engaging or finding the organization relevant
- The organization was noted for its work in promoting enjoyment and questioned for effectiveness in conservation and study.

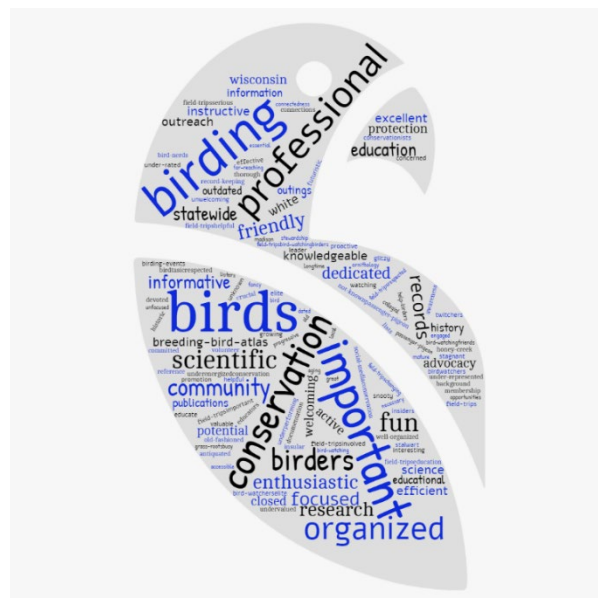
Themes from the survey (continued):

- The roles most perceived for the Society were influencing policy, speaking ‘for the birds’ and building awareness of related issues; the second tier was protecting and managing lands; less relevant by a wide margin were buying land and granting money to other organizations.
- Rating for likelihood of recommending membership: 8.3 of 10.0
- 87% of volunteer respondents reported being satisfied with their experience.
- Rating from volunteers likely to speak highly of the organization: 8.2 of 10.0
- People maintain membership because of the organization’s purpose and its publications.
- People who dropped their membership cited time, money, and lack of direction for the organization.

Following are themes from the comments:

- Survey respondents recognized the need for birding conservation, yet questioned the ability of WSO to do it effectively, and there was a thread of interest in promoting bird education for all ages, particularly younger (youth).
- Things WSO does well: field trips, record keeping, and communicating bird happenings to members – though it is important to note that an equivalent level of respondents wasn’t sure what the organization does well
- Things WSO could do more: attracting younger people, outreach, welcoming events, and better branding
- Things WSO should accomplish in the next 4-5 years: engaging young(er) people, education, habitat/conservation, becoming the leading voice in the state for bird conservation
- Things WSO should accomplish in the next 18 months: figure out the path for the Passenger Pidgeon (as many thought it had run its course as advocated for its continuance), expand membership, define its conservation efforts, and focus its activities
- The greatest issue on the horizon: habitat and climate change
- Vision of the role for WSO: influencing policy, speaking for the birds, and building awareness of related issues
- The most important thing in the next 3-5 years is to keep going.

Generally, many respondents and interviewees noted the need for WSO to focus on its niche and guard against mission creep, being sure to understand where other organizations may be better suited to tackle mission areas of study and conservation. When those engaged with the process were asked what they thought about Wisconsin Society for Ornithology as an organization, the following words were shared (the larger the word, the more frequently it was used as a descriptor):



Considerations and context inform progress

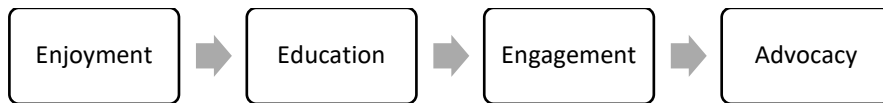
The stakeholder analysis suggested that the organization is at a crossroads requiring focus and greater engagement while balancing sustainability and growth.

For sustainability, the organization will benefit from:

- not alienating the majority of the current base of members while it works to attract new people
- finding and establishing the organization’s niche without losing its legacy
- continuing member dues while assuring affordability and expanding support with diversified income
- meeting non-ornithology people where they are to bring them into the fold
- sunseting efforts less relevant or redundant in current times

For growth, WSO will benefit from moving toward greater engagement and appeal for those under 55 years of age and assuring that people see the organization as welcoming and relevant. WSO will benefit from strengthening the organizational infrastructure, positioning itself as a convenor and collaborator, and connecting based upon themes and points relevant to younger generations.

The association has the unique vantage point of both hard-core birders and enthusiasts. If it promotes the joy of birding, it can engage people across generations and experiences to advance the value of preserving bird habitat in Wisconsin. It can give away joy, engage expertise, and inspire conservation through a journey of participation:



Framework development

The Board and staff met on September 30, 2023, in Oconomowoc for a day of discussion and deliberation. The retreat involved large group and small group conversations to examine the landscape, the future, and the challenges of progress in the current climate.

A Strategy Work Group of Board and staff reviewed a preliminary draft on October 23, 2023. The edited draft was shared with the Board for preliminary reaction on October 28, 2023. It was subsequently discerned by the Work Group on November 8 and December 7, 2023.

Members were invited to provide feedback on the emerging draft. Information sessions to walk through the emerging ideology and strategic direction were held virtually on February 27, 2024, and March 6, 2024. An on-line feedback form was also available late February through mid-March 2024. Constructive feedback was received affirming priorities, clarifying needs for specific action items to be shared with members, and highlighting the diverse perspectives of members. Overall, members who provided feedback agreed with the emerging principles and direction.

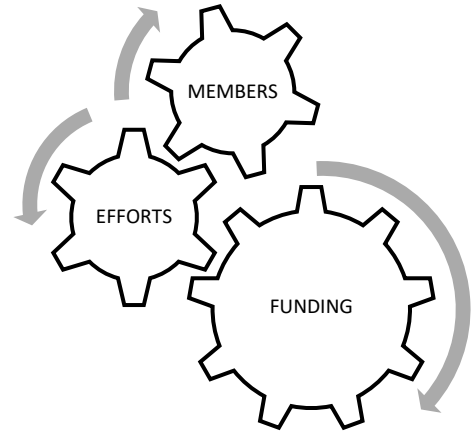
A revision was subsequently discussed with the Work Group and then presented to the Board, which approved the ideology and the strategic framework at its meeting on April 20, 2024.

Document Purpose

This document distills the discussions and information gathered throughout the process into an organizational ideology and strategic framework to guide those involved with the organization. It provides direction for the Board and Executive Director to create implementation and work plans with volunteers.

This work should inform performance goals that bring the strategic vision to life each year. It serves as a guide for semi-annual discussions with the Board about progress and potential modifications based upon changing circumstances within the state and among those it serves and who support it.

Successful implementation of this strategic framework requires ongoing attention to how members engage with time, talent, and treasure in support of the organization’s efforts to have an impact, the achievement of which inspires funding.



Organizational Ideology

The following ideology can serve as a guide for the organization over the long-term, extending beyond the time period of the proposed strategic framework.

Ideology

Mission – descriptive statement capturing the organization’s purpose, why it exists

Promote the enjoyment, study, and conservation of Wisconsin’s birds

Vision – descriptive language reflecting desired accomplishments, what it wants to achieve

A world in which people share an appreciation for birds and advocate on their behalf

Shared Values – core principles that shape actions by all representing the organization, how it acts

- The natural world, including birds, has innate value.
 - Conservation of birds and their environments is vitally important.
 - Birds are an integral part of a healthy food chain and a healthy ecosystem.
 - The viability of bird populations is a critical indicator for the health of the earth.
- Caring for humanity involves caring for birds.
 - Preserving bird habitats enhances our quality of life.
 - Enjoying birds builds our sense of wonder about the world.
 - Birdwatching helps us understand our shared responsibilities to protect the natural world.
- Birdwatching contributes to a sense of connection and well-being.
 - Observing birds in their natural habitat encourages presence and mindfulness.
 - Observing birds with others instills a sense of shared appreciation and community.
 - Observing birds in the wild fosters a sense of responsibility to protect their habitats.
- Birding knows no bounds.
 - All are welcome to experience the wonder of birds and birding.
 - Shared experiences and sharing of resources support a stronger future for birds.
 - The study of birds benefits from history, experience, and advancement of diverse ideas.

2024-2030 Strategic Framework

The following strategic framework provides a basis for decision-making to help the organization optimize its resources in advancing the mission, achieving the vision, and upholding the shared values. It is intended to be dynamic and adaptive.

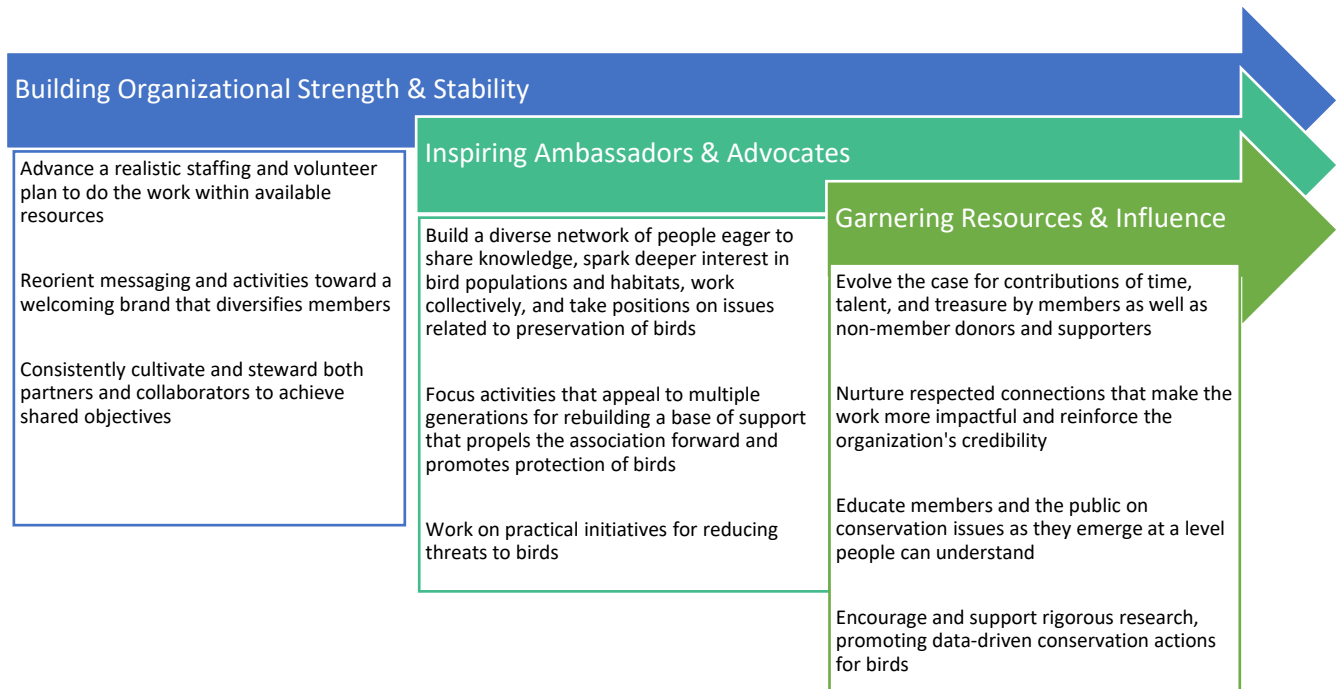
2024-2030 Strategic Framework

Goal – statement of intention to serve as a guiding light over the next several years

- By 2030, those who engage with the Wisconsin Society for Ornithology will reflect people of diverse ages and experiences who enjoy coming together to experience birds and share a sense of responsibility to advocate on behalf of birds for their preservation.

Strategies – pathways for how the organization will realize its goal and what it will be doing to make it happen

- WSO will need to garner resources and influence by inspiring ambassadors and advocates requiring it to continue building organizational strength and stability.
- Each strategy is supported by ways in which to move things forward over time:



Areas of Focus – where the organization will prioritize resources to advance the strategies and achieve the goal

- Volunteer Recruitment and Stewardship
- Diversification and Deepening of Funding Streams
- Outreach and Communication
- Engagement and Advocacy

Objectives – clearly defined statements for how the organization will use its resources in time

Near-Term

- Strengthen the organizational infrastructure with staff bolstering enjoyment and conservation efforts and volunteers advancing ornithological pursuits and study
- Leverage Honey Creek as a place for people to experience the joys of birding and value of habitat preservation

Mid-Term

- Work collaboratively with other groups to spread the joy of birds across demographics and communities
- Activate members as supporters, educators, ambassadors, and advocates to engage others

Long-Term

- Mobilize diverse groups of people to advocate for research and preservation of bird habitat in Wisconsin
- Tap into the energy of the generations who want to maintain healthy ecosystems

Performance Indicators – categories for means to gauge intended impact of activities

- Volunteerism – volume, levels, satisfaction, achievement
- Visibility – sharing, citing, requesting information or knowledge
- Membership – demographics, new/retained, contribution of talent/treasure
- Impact – perception of traits, desired policy changes
- Funding Sources – diversification, growth, unrestricted funds
- Achievement – completion of initiatives and attainment of engagement targets

Communication Pillars – simplified language for communicating with members, partners, and supporters

Through its strategic framework, WSO seeks to:

- Be the voice for bird conservation
- Double down on engaging new people of diverse backgrounds in the study of birds
- Recommit to Honey Creek as an asset for the organization and for studying birds
- Uphold education and information sharing through its network

2024-2030 Activity Considerations

The following activities that surfaced through the process have been categorized according to the identified strategies with suggestions for sequence and lead accountability, if they are pursued. These activities are subject to change and not all may be pursued, based upon resources, emerging needs, and shifting landscapes.

<u>2024</u>	
Resources and Influence	<ul style="list-style-type: none"> ➤ Determine the land management plan for Honey Creek (Board/Work Group) ➤ Determine whether to put Honey Creek into a conservation easement (Board)
Ambassadors and Advocates	<ul style="list-style-type: none"> ➤ Host a series of events throughout the year to spark interest and engage people (Board/Vol) ➤ Reimagine field trips as an entry point for members, being clear on type and intent (Board/Vol)
Org Strength and Stability	<ul style="list-style-type: none"> ➤ Assess all current offerings to determine relevance and impact with the goal (Exec Comm/ED) ➤ Develop a messaging platform and recraft the brand identity (Staff/Task Force) ➤ Document decision-making roles and rights for Board, ED, Work Groups, etc. (Exec Comm) ➤ Streamline printed publications and supplement with online postings (Staff/Work Group) ➤ Create a staffing plan for volunteer coordination, outreach, and admin support (Exec Comm/ED) ➤ Evaluate whether to continue grants and scholarship activities (Board) ➤ Determine path and resource allocation for the Atlas (Exec Comm/Board) ➤ Clarify and document roles and responsibilities for Records (Exec Comm/Board)
<u>2025-2027</u>	
Resources and Influence	<ul style="list-style-type: none"> ➤ Devise a cultivation and stewardship strategy for desired collaborators (ED/Task Force) ➤ Invigorate a Conservation Committee with intention to lobby on conservation issues (ED/Board)
Ambassadors and Advocates	<ul style="list-style-type: none"> ➤ Inspire people to share stories and perspectives on the joy of birds (Work Group/Board) ➤ Update the internet presence with information on birds and conservation groups (Staff/Vol) ➤ Develop systems to mobilize people around critical issues for birds (Staff/Vol) ➤ Create inter-generational opportunities at Honey Creek (Work Group)
Org Strength and Stability	<ul style="list-style-type: none"> ➤ Undertake aggressive recruitment of Board members and volunteers (Board/ED) ➤ Implement a legacy giving program (Exec Comm/ED) ➤ Elevate social media presence (Staff/Task Force/Vol) ➤ Foster Board engagement that helps predict trends and influence issues (Exec Comm/Board) ➤ Reinvigorate a volunteer corps to advance the critical work of the organization (Work Group)
<u>2026-2030</u>	
Resources and Influence	<ul style="list-style-type: none"> ➤ Bolster partnerships (e.g., with Wisconsin DNR, local birding clubs, conservation organizations and land trusts, universities and colleges, and other credible sources) (Board/Staff/Work Group) ➤ Activate campaign for those who love birds to connect with others who share their passion and be the voice preserving habitat for birds in Wisconsin (ED/Task Force) ➤ Build a network of experts as resources for teachers, media, and related organizations (Staff/Vol)
Ambassadors and Advocates	<ul style="list-style-type: none"> ➤ Complete a safe trail system incorporating the Dischler addition at Honey Creek (ED/Task Force) ➤ Promote ‘fun-centric’ bird appreciation through community partnerships (Staff/Task Force) ➤ Develop tools to educate people about birds, their problems, and needed efforts (Work Group) ➤ Convene conservationists and hobbyists around pressing needs for practical solutions (Staff/Vol) ➤ Host an annual lobby day (Work Group)
Org Strength and Stability	<ul style="list-style-type: none"> ➤ Create a technical council to inform and influence policy affecting bird habitats (Board/ED) ➤ Form a ‘Friends of Honey Creek’ to engage volunteers and advocates (Work Group)

Appendix

The following information offers additional perspective and guidance for putting the framework into practice.

Appendix

Considerations for structuring people resources

The following working groups may be useful for initiating implementation of the framework-aligned activities (suggested charter direction provided to spark structure):

- Honey Creek Planning/Management Team – Board and/or staff liaison(s) with volunteer chair; operate within the guidance of the strategic framework to leverage Honey Creek as a place for people to experience the joys of birding; brings recommendations for land management to the Board for endorsement, brings needs for resources to advance activities to Executive Director (and other work groups, as appropriate), makes decisions about day-to-day efforts as aligned with Board direction and stated outcomes; provides timely updates to staff for sharing with members and interested parties; reports progress, needs, and emerging topics to the Board at least annually; may create sub-groups (task forces, work groups, or committees) to advance specific initiatives or activities
- Communications Committee – Board liaison with Executive Director or staff-led committee of volunteers; develops and executes a communications plan that reflects the intention and activities of the strategic framework; brings recommendations and resource needs to the Executive Director for approval, responsible for guiding volunteers to complete day-to-day activities aligned with the strategic framework and brand guide; reports progress, needs, and emerging topics to the Board at least semi-annually; may create sub-groups (task forces or work groups) to advance specific initiatives or activities
- Brand Experience Task Force – Board, staff, and member representatives chaired by Executive Director; formed to build the brand framework (messaging and standards) to guide the organization’s image; time-limited existence, disbands when the brand framework is complete; brings forward recommendation to the Board for its endorsement (or to the Communications Committee, if it is a sub-group of it)
- Events Committee – Board liaison with Executive Director or staff-led committee of volunteers; develops and executes a series of structured, strategically aligned events throughout the state using various methods to engage people (including conventions, unconventions, field experiences, educational sessions, etc.); brings recommendations and resource needs to the Executive Director for approval, responsible for guiding volunteers to complete day-to-day activities aligned with the strategic framework and approved plan; reports progress, needs, and emerging topics to the Board at least semi-annually; may create sub-groups (task forces or work groups) to advance specific initiatives or activities

Appendix (continued)

Idea review rubric

How does this idea:

- promote the enjoyment, study, and conservation of Wisconsin’s birds?
- help create a world in which people share an appreciation for birds and advocate on their behalf?
- align with the guiding principles for the organization?
- help the organization reflect people of diverse ages and experiences?
- encourage people to come together to experience birds?
- contribute to a sense of responsibility for advocating on behalf of birds for their preservation?
- build organizational strength and stability?
- inspire ambassadors and advocates?
- garner resources and influence?
- fit within our objectives?
- make sense with our strategic framework?

Reference for prioritizing ideas

Consider assessing current and emerging opportunities based upon an impact/difficulty matrix.

- Evaluate each idea along a 10-point spectrum (small to large payback and easy versus hard to do).
- Then plot each of the ideas to reveal a path for prioritizing:

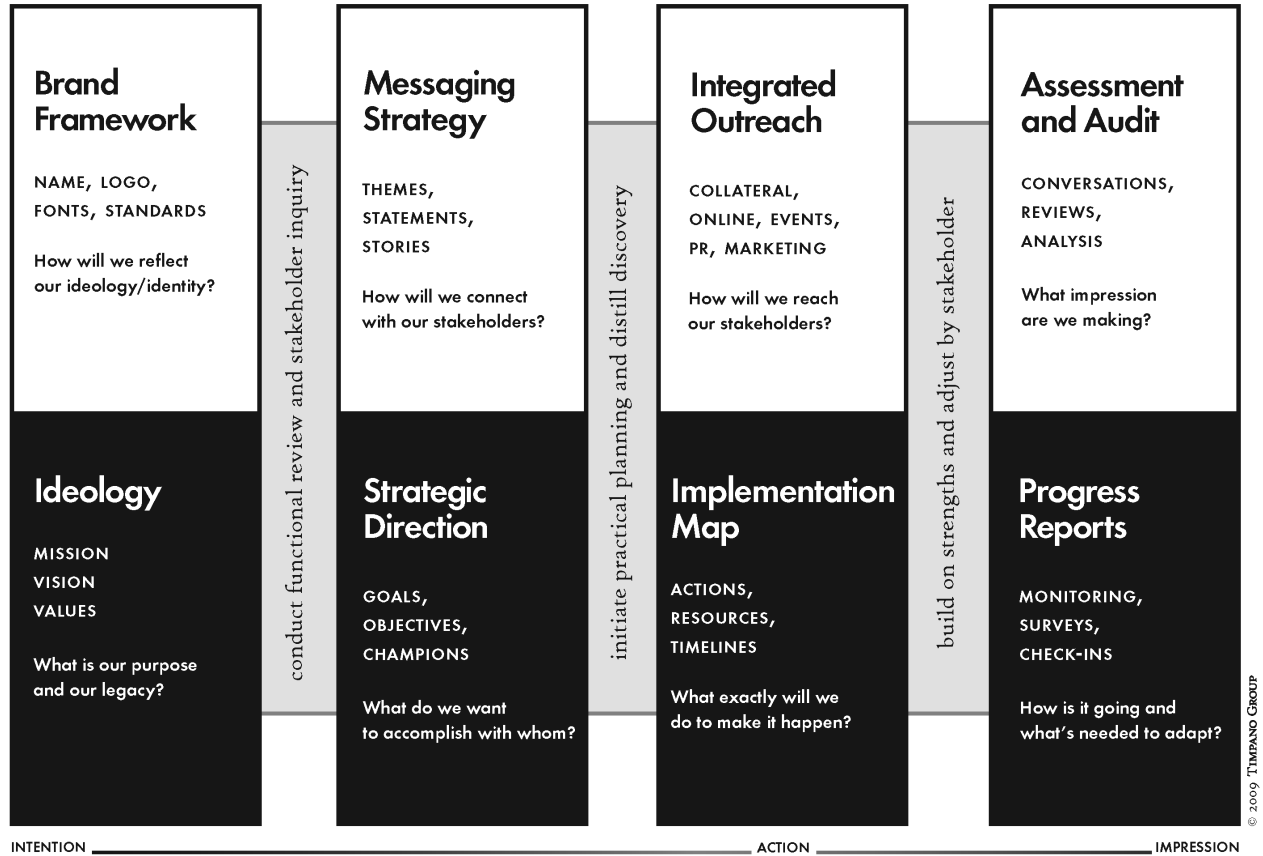
	Easy to Do	Hard to Do
Large Payback	PRIORITY Go for it!	CHALLENGE Plan for it!
Small Payback	ACTION Make it happen!	ELIMINATE Don’t do it!

- Assess these results back against the ideology and framework to assure prioritization of resources (or possible determination of what is going to be put aside in favor of an emerging need/idea).

Appendix (continued)

Considerations for messaging and brand building

The Reflective StrategySM model connects strategic planning with strategic communication, helping organizations become more efficient and effective with a clear basis for decision-making reflected in a platform for consistent communication:



Proposed Value Proposition: For those who love birds, Wisconsin Society for Ornithology is your place to connect with others who share your passion and to discover resources that deepen your appreciation for all things birding

Proposed Theme: Relevance

Proposed Primary Brand Traits: Welcoming + Insightful

Proposed tagline: for the love of birds

Proposed Aesthetic: modernize the logo and visual standards

Appendix (continued)

Recommended review milestones

As the strategic framework is intended to be dynamic, the organization will do well to have periodic check-ins about its relevance and applicability to changing circumstances (and to celebrate achievements).

The Board should discuss progress against annual objectives on a semi-annual basis and review relevance based upon changing circumstances on an annual basis.

The Executive Committee and Executive Director should discuss progress as part of ongoing review of organizational initiatives and to guide the Executive Director's annual goal-setting and performance review processes.

Staff and volunteers should consult the framework to guide its efforts over the course of the year and to foster alignment of their annual work to establish project plans.

Overall, it should be a guide for prioritizing new ideas, evaluating progress on initiatives, and allocating resources.