

# Guadalupe – Blanco River Trust Plum Creek Wetland Preserve

Lockhart, Texas

## A Peer Consultation by the Association of Nature Center Administrators March 17-19, 2016

### Final Report Submitted by:

- Haley Breniser, Executive Director, Grass River Natural Area, Bellaire, MI
- Dave Catlin, Principal, David Catlin Consulting, Springfield, MO
- John DeFillipo, Director, John Bunker Sands Wetland Center, Seagoville, Texas
- Ann Rilling, Marketing & Communications Director, Association of Nature Center Administrators, Cortez, CO



**ANCA**  
**P.O. Box 464**  
**Logan, UT 84323**  
**(800) 490-ANCA**  
**435-787-8209**

## Table of Contents

|  |            |
|--|------------|
| A Word About ANCA .....                                      | 3          |
| A Word About Peer Consults .....                             | 3          |
| Introduction .....   | 4          |
| Peer Consult Methodology .....                               | 5          |
| Recommendations, Considerations & Observations .....         | 6          |
| Conclusion .....   | 19         |
| Appendix A .....   | 20         |
| Biography of Consultants                                     |            |
| Appendix B .....   | 22         |
| Documents Reviewed   |            |
| Appendix C .....   | 23         |
| People Interviewed   |            |
| Appendix D .....   | 24         |
| The Process of Creating a Nature Center                      |            |
| Appendix E .....   | Attachment |
| JBS Wetland Center - Wetland Habitat Management Plan         |            |
| Grass River Natural Area – Comprehensive Management Plan     |            |
| Grass River Natural Area – Natural Resources Management Plan |            |
| Appendix F .....   | Attachment |
| JBS Wetland Center – Fundraising Examples                    |            |
| Grass River Natural Area – Fundraising Examples              |            |

## **A Word About ANCA**

The Association of Nature Center Administrators (ANCA) is an international non-profit organization that promotes and supports best leadership and management practices for the nature and environmental learning center profession.

The goals of ANCA are:

- To maintain an international network for nature and environmental learning center directors and administrators;
- To promote the identity and professional stature of nature and environmental learning centers as educational facilities;
- To provide nature and environmental learning center administrators with products and services that will improve their performance on the job.

ANCA is a private nonprofit organization that was founded in 1989 to create a professional association solely of and for leaders in the nature center profession—directors, managers, senior administrators, and board members. It is the only such organization in the U.S.

Among the services that ANCA offers to the profession are Peer Consults for nature centers and similar organizations that are seeking professional advice and perspectives from some of the profession's most experienced leaders.

## **A Word About Peer Consults – A Service to the Profession**

ANCA Peer Consults provide a unique service to the nature center profession. They offer intensive examinations of important questions for client organizations, conducted by carefully selected nature center professionals whose skill sets match the issues to be explored. Consults also provide professional development opportunities for center staff.

The ANCA professionals volunteer their time and expertise and the host organization pays travel, lodging, and other expenses incurred by the consult, and a fee to ANCA that helps cover administrative costs and other valuable ANCA services including scholarships. In return, client organizations gain the advantage of advice and guidance from some of the most respected and experienced leaders in the nature center profession.

## Introduction

The Guadalupe-Blanco River Trust (GBRT) is a 501(c)(3) nonprofit land trust organization that was developed to conserve land in the Guadalupe River Watershed for its natural, recreational, scenic, historic and productive value. It was founded in 2001 by the Guadalupe-Blanco River Authority, a conservation and reclamation district created in 1933 by the Texas Legislature. The Upper Guadalupe River Authority (UGRA) has also partnered with the Trust. The voluntary board of directors consists of citizens who share a love of the Guadalupe River - one of the most pristine rivers in Texas.

The Guadalupe-Blanco River Trust (GBRT) was given the opportunity to acquire a unique wetland mitigation bank through the transfer of title of a conservation easement agreement between Caldwell County, Texas and the City of Lockhart. These two organizations were granted the mitigation from the Texas Department of Transportation (TXDOT). With the construction of State Highway 130, TXDOT was required to mitigate for the impact to wetlands along the entire highway corridor due to the construction. The site that was chosen for this mitigation was a 265-acre tract located along Plum Creek, just north of Lockhart. The property is located west of the southbound lanes of State Highway 183 and the entire site is located within the 100-year floodplain of Plum Creek. GBRT refers to this mitigation wetland as the Plum Creek Wetland Preserve. As mentioned in the conservation easement agreement the “property possesses natural, scenic, open space, ecological, and educational values and provides a significant habitat for wildlife and plants (collectively "conservation values") of great importance to GBRT, the people of the region and the people of the State of Texas.”

The purpose of the conservation easement is to:

1. Retain or protect natural, scenic, or open-space aspects of the wetland.
2. Ensure the availability of the wetland for recreational, educational, or open-space use.
3. Protect natural resources.
4. Maintain or enhance air and water quality.

The Plum Creek Wetland Preserve (PCWP) has the great potential to fulfill and further outline the mission of GBRT to preserve the unique natural heritage of the Guadalupe watershed for future generations, by “protecting open landscapes, working farms and ranches, and wildlife habitat through conservation easements, education, and outreach that connects people to the water and the land.”

GBRA received the title to the PCWP in late 2015. This prompted them to contact the Association of Nature Center Administrators to assist with defining the processes needed to carry out the conservation agreement, providing public access and determining the best land management practices. The Association of Nature Center Administrators (ANCA) performed a professional consultation for GBRT on March 17-20, 2016.

## Peer Consult Methodology

The Consult process began in February 2016. John DeFillipo, Team Leader, worked with Carrie Kasnicka, GBRA Conservation Director, to select team members and establish the dates of the visit to Lockhart, Texas. Consult Team members reviewed background information including PowerPoint presentations, conservation easement agreements, brochures, website and other related materials<sup>1</sup>. The Consult Team visited Lockhart, Texas on March 17-19, 2016; toured the Plum Creek Wetland Preserve; and conducted two rounds of interviews with board members, public officials, GBRT employees and committed stakeholders<sup>2</sup>.

The ANCA Peer Consult Team identified four key areas where GBRT needed our input.

1. Identify, Rank and Prioritize Important Key Steps in getting ready to open up the property for public use and eventual nature center
2. Provide Direction for Land Management Usage
  - a. How is the property being used now?
  - b. Define Accessibility
  - c. Establish Safety Parameters – Liability and Hazards
    - i. Insurance discussion
    - ii. Fencing, trails & signage
  - d. Define Multiple Uses of Property
    - i. Public Use
    - ii. Grazing/Hunting
    - iii. Birding
3. Fundraising 101
  - a. Examples of Successful Fundraising
  - b. Where to begin
4. Do's & Don'ts
  - a. Provide examples of what works well and what hasn't worked well from our experiences

ANCA selects its Consult Team members based on the needs of the client and identified members that were familiar with public private partnerships, start up nature centers, fundraising experience and land management of wetland areas.

### **Haley Breniser, Executive Director, Grass River Natural Area**

Haley has been with GRNA since November 2013 and is leading the organization on many fronts, including: board restructuring, fund development strategy, applied conservation practices, policy revisions, community engagement, forging effective partnerships, and expansion of education and land management programs.

### **David Catlin, Principal of David Catlin Consulting LLC**

---

<sup>1</sup> See Appendix B for a complete list of the materials reviewed by the Consult Team.

<sup>2</sup> See Appendix C for a complete list of individuals interviewed by the Consult Team.

Dave's firm is devoted to supporting new and existing nature centers and similar institutions in the U.S. Prior to launching the business in early 2015, he served as Senior Director of Field Support for the National Audubon Society. Before joining Audubon in 2000, Catlin worked 16 years for the Missouri Department of Conservation, 10 years as manager of the Springfield Conservation Nature Center and six as an interpretive planner.

**John DeFillipo, Director of the John Bunker Sands Wetland Center**, served as Consult Team leader. He is an engaging naturalist with over 20 years of experience blending ecological concepts with business insights. John became the Director of the Wetland Center in March 2010 and was instrumental in exhibit design, business planning, fund development, research initiatives and productive partnerships. John has guided the Wetland Center to become a premier example of environmental education with a strong focus on habitat and water conservation, public education, partnerships, and wetland research.

**Ann Rilling, Marketing and Communications Director for ANCA**

Ann has served in her current position since 2007. Prior to that she served on the ANCA board of directors for four years, serving as Vice President of Professional Services and Chair of the Publications and Leadership Award Committees. Ann's experience in the nature center profession began in 1994 as co-founder and founding Executive Director of Durango Nature Studies in Durango, Colorado. For 10 years she was involved in all aspects of starting, growing, and managing this non-profit environmental education organization including leading a capital campaign to purchase the 140-acre nature center property.

(Detailed information on the ANCA Consult Team members is provided in appendix A)

The Consult Team conducted a brief verbal summary of their initial considerations and recommendations to Carrie Kasnicka and Oscar Fogle on the last afternoon of the consultation. We hope that this more detailed report provides Guadalupe Blanco River Trust with the confidence to move forward with managing the property and preparing the preserve for public use.

**Recommendations, Considerations, and Observations**

During our oral presentation we presented the initial recommendations and observations in the format of the predefined key areas for GBRT. We will use the same format in this report with additional supplements, references and documentation.

**Key Issue # 1**

**Identify, Rank and Prioritize Important Key Steps in getting ready to open up the property for public use and a possible nature center.**

GBRT has a golden opportunity to maintain a preserved wetland habitat that can be used for community gatherings/projects, environmental education, and

conservation/research initiatives while championing the mission of the Trust. We recommend that before allowing any type of access you carefully and thoughtfully consider **establishing a mission** for the PCWP, **determining the customers' needs** and **evaluating the available and future resources**. The following Venn diagram shows the important relationship between mission, customer needs, and resources in order to achieve the desired successful outcome. Equal consideration must be given to all three from the beginning of this process.



Your goal at the end of this process is to find the best balance for all three with the yellow shaded area being your desired outcome. The following quotes are from various interviewees show PCWP's potential.

*"This would be a big and natural attraction for the county."*

*"We don't have a county park; it was my plan to offer this as a recreational opportunity for the county."*

*"I want to see it grow, but grow properly."*

*"This site could be a 'champion' of wetland preservation model and it makes me wonder what else could be showcased there."*

The following Key Steps are a detailed outline of the attached Appendix D titled "The Process of Creating a Nature Center."

## 1 Identify a Leader

Before undertaking the processes outlined in this document, we highly suggest that you identify a Leader of the Plum Creek Wetland Preserve.

This person could already exist internally or could be appointed and/or hired externally. This position would most likely be a full-time position and will require a diverse skill set related to business development, fundraising experience and land management knowledge, and would be expected to interact professionally with all current and future partners, board members and stakeholders.

## 2 Mission

Create a specific project mission for the Plum Creek Wetland Preserve that directly relates to and supports the organizational mission of the Guadalupe-Blanco River Trust. The PCWP could directly support the mission of GBRT to preserve the unique natural heritage of the Guadalupe watershed, conserve open landscapes, protect wildlife habitat through conservation easements, and provide education and outreach that connects people to the water and the land.

Examples:

John Bunker Sands Wetland Center's mission is to educate the public and provide research opportunities in the areas of water quality and supply, wildlife management, and wetland systems.

Grass River Natural Area's mission is to manage Grass River Natural Area, conserve and protect its watershed and provide opportunities that increase knowledge, appreciation and community-wide stewardship of the natural environment.

Cibolo Nature Center's mission is to promote conservation of natural resources through education and stewardship.

## 3 Select and Secure a Site

Secure an upland site overlooking the Plum Creek Wetland Preserve for a possible future education/research facility or visitor center.

While there is not agreement on whether or not PCWP should have a visitor center or other building constructed as a part of the project, at the moment such a structure would be precluded by the fact that the entire site is in the floodplain of Plum Creek. Therefore, even if the construction of a building is only a possibility, steps should be taken now to acquire adjacent high ground that can serve as a building site.

The transfer of title of the PCWP to the GBRT provides an opportunity for the Trust to leverage this 265-acre parcel of land to acquire additional properties for the overall protection of the Plum Creek watershed. The possession of the title shows long term commitment from GBRT and would encourage other landowners to join in a commitment to protect a larger portion of the watershed.



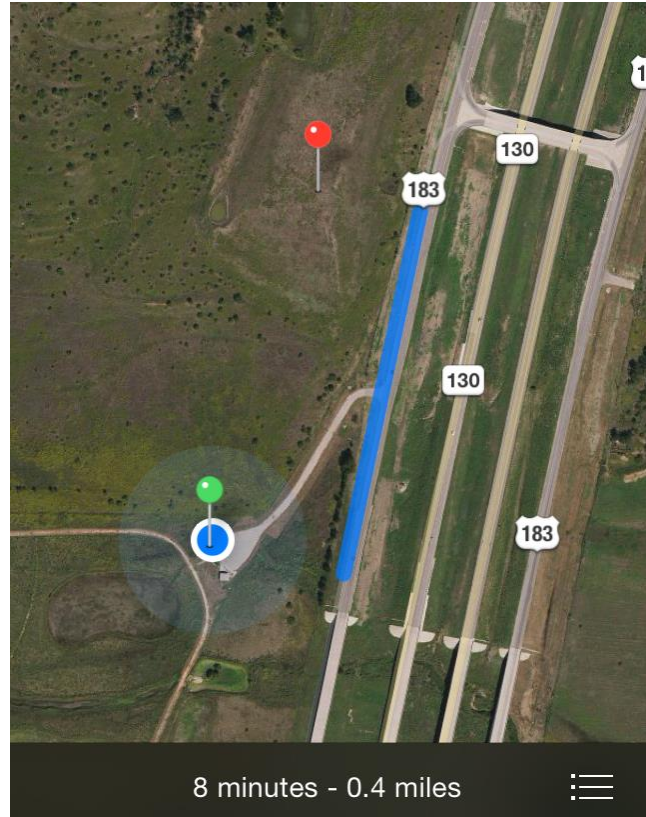
One possible location for a facility site would be the spoil pile created when the wetland mitigation bank was created.

*Seek advice from a structural or geotechnical engineer for a site assessment.*

Other possible locations could be from surrounding landowners.

Consider the distance that visitors, researchers, and students must travel in order to reach the best locations in the wetland. Estimate walking time from adjacent fill site to wetland.

Consider working with the Army Corp of Engineers to establish another structure in the flood plain close in proximity to the established restrooms.



## 4 Evaluate Available Resources

Conduct a complete inventory of all tangible and intangible available resources.

This process can be conducted internally with the current GBRT and GBRA organizations. You could also conduct a meeting with your existing partnerships with Texas Parks and Wildlife, Ducks Unlimited, local universities and research organizations to assist in identifying resources. This process will clarify current resources and future needs for GBRT.

**Natural Features** – Plum Creek Wetland Preserve is a unique tract of land that can promote the existing mission of GBRT. We would suggest an inventory of all flora and fauna existing on the property and an overview of Plum Creek Mitigation Plan to establish a base line of what is currently on the property.

**Cultural Features** – Identify any culturally significant man-made or natural features within the mitigation area and upland site distance from the property.

**Structures** – Identify all structures and the condition of the structures. Bathroom, bridges, fences, existing roads, and parking areas.

**Zoning & Regulations** – In accordance with the Conservation Easement Agreement and the Plum Creek Mitigation Plan, make a short list of any zoning and regulation

prohibitions. This will help guide the land management of the property and possible future building on or near the property.

Use History – List any historical use of the property. It was mentioned that this was a proposed dam site in an historic water plan for Texas.

Access to Property – List individuals, organizations and groups that have been able to access the property so far to date. Make a list of the user groups that wanted to access the property but were unable to due to restrictions.

Funds on Hand – \$400,000 worth of funding was supplied by the Texas Department of Transportation as a result of the transfer of the conservation easement agreement. In addition to the \$400,000 list any available monetary resources.

Partners – List all committed and non-committed partners.

Committed – GBRA, GBRT, Texas Department of Transportation, etc.

Non-committed – Ducks Unlimited, Lockhart Independent School District, etc.

Time – Determine the amount of time available by current internal board members, staff and volunteers to assist with the process.

## 5 Assess Customer Needs

Conduct a market analysis to determine the current and future user groups of the Plum Creek Wetland Preserve.

Market Analysis – Conduct a broad market analysis of potential users. You won't be able to satisfy everyone's needs, because you have limited resources to deploy and because some of those needs conflict. However, it is important to understand the needs of all potential users before you begin to make choices. Potential users will include residents and groups within the Plum Creek Watershed, the cities of Lockhart, Luling, Dale, Maxwell, Uhland, Kyle, Mendoza, Mountain City, and the counties of Caldwell and Hays. It may also include certain types of users who would come from Austin and other more distant locations—birdwatchers, hunters, school classes, etc.

This can be conducted with simple surveys in the local newspapers, interviews with unofficial representatives of potential user groups (e.g. school teachers and administrators, Audubon Society staff and board members, leaders of other clubs and organizations), an online email survey, and general public meetings in different regions of the county and watershed.

Current Site Uses – List any current and random special use.

Identify Market Segments – Some types of potential users are already known to you. These may include school groups, community groups, outdoor experiential groups, natural resource groups, and regional outdoor recreation groups. However, your market

research may uncover other types of users you may not have anticipated, and who may not be represented by formal organizations like the ones mentioned above.

**Competitive Analysis** – Complete an analysis of your competition within a 60 mile radius. The analysis can be conducted by an online search, visiting in person, and asking individuals and groups where they visit when looking for the same kinds of opportunities your site might offer. Be mindful of the fact that not all of the “competition” will be nature centers. It will vary by market segment. For birdwatchers, wetland sites (whether or not there are educational services there) will be competitive. For cross-country runners, alternative sites may be city parks or golf courses.

**Trends** – Identify current trends that may impact your future planning. Are residential development and population moving into the area from Austin? Are the local population demographics shifting? Does the fact that more and more people carry smart phones and tablets suggest that your planning needs to emphasize, say, digital information more than in-place interpretive signage? It isn't possible to foresee every trend or anticipate the impact it will have, but many will be obvious and have predictable ramifications for your planning.

**Consider the previous 5 steps as the legwork and preparation before the following 3 steps begin.**

## **6 Summary of Findings Document**

The results of all the information-gathering described above should be compiled into a product (which can be written, graphic, or some combination of media) that every decision-maker can review. The intent of a “Summary of Findings” is to support thoughtful decision-making. It embodies the adage, “Everyone is entitled to their own opinions, but not to their own facts.” The Summary will serve as a reference for the planning that follows.

## **7 Make Key Decisions**

Once the mission is determined, resources are realized, and analysis of market, competition and trends are completed, you can clearly move forward with establishing:

- Vision – defines the ultimate goal of the organization.
- Target markets
- Interpretive themes
- Programming and environmental goals

## **8 Develop Business Plan**

This key document is a specific overview of how the organization will operate to achieve its defined goals and objectives. It can include some or all of the following:

- Executive Summary

- Financial Plan
- Budgets – Capital and Operating
- Strategic Plan
- Marketing Plan
- Operating Plan
- Programming Plan
- Site Plan
- Building Plan
- Risk Analysis

The development of a business plan can be a fluid process and does not have to be completed in its entirety before you move forward with access to the PCWP or beginning stages of planning a nature center. It is important to have the framework and major components defined for clear communication to internal and external stakeholders and provide GBRT with a roadmap for success.

## **Key Issue # 2**

### **Land Management & Wetland Preserve Access**

#### **1 Land Management**

The ongoing management of a wetland mitigation preserve can be challenging and resource dependent. To the benefit of GBRT you have the tools and resources readily available to assist with this process and plan for the future needs of the wetland. Although this item is listed as the second key issue, we suggest that you move forward on key issue number one and two simultaneously.

The GBRT should set up a land management meeting with your internal partnership network including Texas Parks and Wildlife Department, National Resource Conservation Service, local agri-life extension, and other organizations to review and advise GBRT on the following land management goals. This will help to reduce cost and extend the \$400,000 funds to manage the wetland preserve.

- Long-term management and protection of the SH 130 Detailed Compensatory Mitigation Plan – Plum Creek.
- Create a comprehensive Wetland – Wildlife Management Plan for PCWP. Refer to Appendix E as an example.
  - JBS Wetland Center – Wetland Habitat Management Plan – Attached
  - GRNA Comprehensive Management Plan – Attached
  - GRNA Natural Resources Management Plan – Attached
    - Moist Soil Drawdowns
    - Treating Undesirable Vegetation
    - Manipulating Wetland Units
    - Seasonal Plantings
    - Prescribed Burns

- Increase of Desirable Wetland Plants

If the capacity of the internal partnership network cannot efficiently and effectively manage and protect the PCWP, then contact a wildlife/wetland management consultant company to review and advise GBRT on the land management goals.

The cost will increase proportionally the further out you expand your consultation from the internal partnership network.

**As outlined in the inter-local agreement and part of the title transfer – the PCWP’s primary purpose is for mitigating impacts to waters of the U.S. and public use is a secondary function.**

## 2 Plum Creek Wetland Preserve Access

PCWP public access is one of the main goals of the entire planning process. Before you allow the first user group, consider the following.

### Establish Safety Parameters – Identify Liabilities and Hazards

Walk the perimeter, internal trails, roads and units of wetland property to inventory the impact of the flooding and years of natural intrusion on the property. Create a prioritized list of immediate safety concerns and address them accordingly. We have listed a few here that have an immediate concern.



Fig. 2. PCWP existing fence.



Fig. 3. Electric power fence.

- Remove the flood-damaged perimeter fence and replace with electric power fencing. This is a common practice on multi-use land and can be easily maintained with your existing fence supports. Flood waters and debris will flow through the single strands and around the existing fence supports. (Fig. 2 & Fig. 3)
- Maintain the existing road surfaces, trails and access points. Mark the parking area and install the “No Parking” signs in accordance with SH 130 Detailed

Compensatory Mitigation Plan. The “No Parking” signs are located behind the bathrooms in the maintenance closet along with the poles.



- Clean and maintain the existing bathrooms with a power washer.
- A water supply is located behind the bathrooms in the maintenance closet.

- Review insurance policies of GBRT and GBRA and clarify if your existing insurance coverage will be sufficient for the PCWP real property and personal injury.

#### Provide Oversight of Accessibility and Safety for User Groups

Once your leader is established, this individual will be responsible for oversight of the entire property, including but not limited to opening/closing the gate, public access, and emergencies.

#### Define Multiple Uses of PCWP

Education, research, hiking, trail-running, bird watching, waterfowl hunting, cattle grazing, and wetland studies were a few of the many potential area uses that were identified during our interviews. Once you have defined the priority and frequency of access for multiple-user groups, create a master calendar to communicate the use of the PCWP to the necessary internal and external stakeholders.

Be mindful of the fact that once you permit various types of use, it will be hard to reverse those decisions. Right now, you are starting with a substantially “clean slate.” Opening the site to things like hunting, bicycling, and cross-country running will develop constituencies, though, who will become invested in having access. We therefore suggest that you move slowly and strategically.

During our interviews we asked the question “If you owned the property and money was not a limiting factor, what is your vision of the property 10 years from now?” Below are numerous quotes that will help to define multiple uses of the PCWP.

*“38,000 people live in Caldwell County, 14,000 people live in Lockhart and we would like to see people hike and bike. Would like to see inner city schools from Austin come down for education and a need for outdoor education from the towns of Luling, and Lockhart, and Prairelee.”*

*“I would clean it up.” There should be fish in every pond. There have been three floods in the last two years. “If you don’t have controlled access, you’ll have a bunch of dope dealers...that would be the worst thing.”*

*“I wouldn’t do anything with it... maybe duck hunting. Whatever they decide to do, it’s not going to bother me.”*

*“I’d probably use it for winter grazing, more than anything. You could divide the property using electric fences.”*

*“Visitor center, static exhibits, full trail system, two full-time staff and one part-time, maybe open seven days a week with limited access and a volunteer crew.”*

*“I would love to see it develop slowly into something like McKinney Roughs; the county would be interested in that.”*

*“Would like to show best practice.” “I want to see this as a diamond in the rough.”*

*“Lockhart has to know as something other than four BBQ joints.”*

*“I want it to be a property that enhances the community; to be a centerpiece of the Plum Creek Watershed.”*

*“Lease for cattle grazing like Bobbie Smiedt- they leased the surrounding property. Possibly drain wetland, plant millet”*

*“Come to Lockhart, eat barbecue, and do the fun run.”*

*“It needs to be regulated. It needs to be controlled locally.” [Referring to access.]*

*“It’s not appropriate for vehicles...If you allow motor vehicles in there, the whole thing is ruined.”*

*“I think the waterfowl is the key attractor. . . . The opportunity to make this a major wildlife—waterfowl—site is pretty significant.”*

*“We have a lot of people interested in hiking . . . birdwatching.” Might be a good place for Scout jamborees. “A place for city people to get out into nature. Science groups in the schools would utilize it. Four-five teachers have expressed interest.”*

*“I probably have received 150 calls [from people wanting to walk on the property].” Quite a few elderly people, many who grew up along the creek. “Even from the east side.”*

## Recommendations

1<sup>st</sup>

- Allow select user groups on the property and see where they wander, where the natural gathering places are.
- Establish a temporary shade structure and signs to direct your first user groups.
- This information will help guide what the most important “physical” structures are needed.

2<sup>nd</sup>

- Review needs and outcomes of the first selected user groups.
- Determine the best use of the property from these outcomes.
- Invite partners, community members, and site leaders to participate in a three- to five-year strategic site plan.
- Outline tentative access timeline, define vision, and plan ahead for communication to the public and stakeholders.

## **Key Issue # 3** **Fundraising 101**

Fund development will be a crucial step in providing continued management and access to the PCWP. During our interviews we followed up our 10 year vision question with “What is the top challenge to achieve that vision?” The resounding answer was a source of sustainable funding.

*“Funding, there are strong nature advocates in the area who have money.” “When the property was deeded to GBRT, the county assumed GBRT had a trust fund and would have greater access to grant monies”*

*“It all comes down to money and manpower.”*

*“Funding, I feel that there is an opportunity in GBRA and GBRT building on existing partners and in writing grants for funding.”*

*“Fundraising is in its embryonic stage. GRBA gets the money from the water selling. Come up with the funds for salary and benefits through a grant or...a similar partnership like Plum Creek Watershed Partnership.*

*“We are counting on living and dying by the grant”*

## **Fundraising 101**

The following examples are taken from the ANCA Director’s Guide to Best Practices and the experience of the ANCA Consult Team. This is only a brief overview, please refer to chapter 5 in the Director’s Guide to Best Practices.



## Where to begin

- Create List of Potential Donors
  - Friends, partners, prominent community members
- Purchase Donor Management Software (DMS)
  - Little Green Light, Black baud, Donor Perfect
  - QuickBooks & Excel work as well
- Create a Compelling Case for the ASK
  - Before you make the ASK, formulate a clear message for the PCWP.
  - Create a website and build social media for PCWP to communicate the message. Once you make the ASK, you will have a destination for the potential donor to visit even if you do not have access to the property or a nature center.
- Don't Be Afraid to Ask for Money
  - Most people are waiting to be asked to support your mission and vision.
- Keep Records of EVERYTHING
  - Whenever a donation is made, keep all letters and correspondence for backup and tax purposes. Donor forms, emails, phone call records, etc. Your donor management software will help with keeping your records organized.
- Don't Be Afraid to Ask for Help
  - Reach out to other local non-profit organizations.
  - Collaborate with the ANCA professional network.
  - Have lunch with a local development director.
- Brainstorm How to Create Site Specific Fundraising
  - PCWP is a beautiful location and potential donors will naturally be inclined to make a contribution once they are exposed to the site.
  - Consider a kick off campaign in the parking area of the PCWP once you have established clear messaging, vision and mission.

## Types of Funding Sources

- On-Line Giving – Social media or general email request.
- Special Events – Evening dinners, fun runs, wine tasting, etc.
- Grants – Specific funding provided for specific projects.
- Earned Revenue – Entry fees, workshop fees, rental fees, retail revenue.
- Annual Campaign – yearly ask to donors to contribute - normally in the fall.
- Capital Campaign – larger campaign to raise money for construction, major capital improvements, or endowments.

## Checklist of Recommended Practices – Advanced Stages of Fund Development

- Build a Development Team
  - Demonstrate Development Leadership
  - Coordinate Fundraising with Other Organizations
  - Engage Board Members in Fundraising
  - Build Development with Staff and Volunteers
  - Hire Consultants when Needed

- Plan for Development
  - Tie Goals to Mission, Strategic Plans and Programs
  - Know and Understand your Constituency
  - Keep Fundraising Principles in Mind
  - Identify and Target Funding Sources
  - Select the Appropriate Solicitation Strategy
- Create Goals and Strategies
  - Produce an Annual Development Plan
  - Establish an Annual Giving Program
  - Develop Individual Support Through Members, Contributors, and Major Donors
  - Conduct Special Events
  - Generate Additional Funds Through Earned Income
- Establish Ongoing Systems
  - Thanks Donors for Their Contributions
  - Process Donations Promptly
  - Keep Accurate Membership and Donor Records
  - Recognize Donor Support
  - Produce Development Reports
  - Evaluate Fundraising Strategies

### Examples of Successful Fundraising

See appendix F

- John Bunker Sands Wetland Center – Attached
- Grass River Natural Area – Attached

## **Key Issue # 4**

### **Dos and Don'ts**

#### **DO!**

- Identify a leader of the Plum Creek Wetland Preserve.
- Establish clear messaging and communication with the public.
- Champion milestones as you reach them, even the small ones.
  - “We just got a \$10 donation”
- Convey a focused vision with your Board of Trustees.
- Grant access is phased approach.
- Capitalize on the energy around this project before people lose interest.
- Involve all past and present stakeholders in the planning process.

## **DON'T!**

- Don't underestimate the interest in people wanting access to the PCWP. Once you provide an opportunity to access the property, people will spread the word overnight.
- Don't hesitate in the processes recommended from this consultation. The stakeholders we interviewed expressed patience but are expecting progress as a result of this consultation.
- Don't provide access to some user groups on a select basis. This will show favoritism to one group over the other. A positive reputation is important to maintain from the beginning.

## **Conclusion**

The Guadalupe Blanco River Trust is poised to provide Caldwell County and the surrounding community a unique opportunity to enjoy the Plum Creek Wetland Preserve for generations to come. By championing committed partnerships and creative ingenuity, you will create an enjoyable and safe environment to learn about conservation of wetlands, wildlife and water. We envision the outcome of these conservation efforts as the shining example of the mission and vision of the Guadalupe Blanco River Trust. The ANCA Consult team appreciates your willingness to learn and the generosity of the City of Lockhart during this process. We look forward to celebrating your success at the Plum Creek Wetland Preserve.

## Appendix A

### GBRT – Guadalupe Blanco River Trust ANCA Consult Biographies



**Haley Breniser, Executive Director**, is a proud native of Michigan and a graduate of Michigan State University's Department of Agriculture and Natural Resources. Her respect for wilderness and passion for conservation originated from an unforgettable and humbling two-week backpacking trip on Isle Royale when she was 19. From that point forward, she has participated in a variety of environmental education, conservation, and research projects throughout Michigan, the United States, and the Canadian Rockies. She has worked in the non-profit sector for more than 10 years. Previous to her position at Grass River Natural Area, Haley worked for the Kalamazoo Nature Center (southwest MI) as Director of Ecological Services. She is inspired by the diverse plant and wildlife communities within our protected lands as well as the human communities that so passionately support them. Haley has been with GRNA since November 2013 and is leading the organization on many fronts, including: board restructuring, fund development strategy, applied conservation practices, policy revisions, community engagement, forging effective partnerships, and expansion of education and land management programs. In her free time Haley co-manages UnderToe Farm, a small organic vegetable, fruit and pastured poultry farm in northern Michigan with her husband Adam Brown. She values relationships with people. She values the solace found in wilderness and the taste of a warm, sweet strawberry freshly harvested. At the end of the day, Haley deeply appreciates the reflective conversations that occur with good friends and good music around a camp fire, often fostering ideas that promote positive change.



**David Catlin is Principal of David Catlin Consulting LLC**, a firm devoted to supporting new and existing nature centers and similar institutions in the U.S. Prior to launching the business in early 2015, he served as Senior Director of Field Support for the National Audubon Society. In that position, he coordinated Audubon's support to its 18 nature centers in the Mississippi, Central, and Pacific Flyways—support that included strategic and business planning, curriculum development, staff selection and training, financial management, branding and marketing, and program evaluation. He also led the organization's effort to develop new centers nationwide. Before joining Audubon in 2000, Catlin worked 16 years for the Missouri Department of Conservation, 10 as manager of the Springfield Conservation Nature Center and six as an interpretive planner. He is a past president of the Association of Nature Center Administrators (ANCA). Catlin has a degree in Natural Resources-Environmental Education from Michigan State University and a Masters in Outdoor Recreation-Interpretation from the University of Washington. He lives in Springfield, Missouri.



**John DeFillipo, Director of the John Bunker Sands Wetland Center**, is an engaging naturalist with over 20 years of experience blending ecological concepts with business insights. After receiving his BS degree in Business Administration in 1992 from the Mississippi University for Women, he pursued a naturalist career with two nature centers in the southeastern United States; Camp McDowell Environmental Education Center in Alabama and Crow's Neck Environmental Education

Center in Mississippi. In 2002, John refined his focus as an Outreach Educator with the Mississippi Museum of Natural Science where he presented endangered species programs, including live Alligators. While living in Mississippi, John served as the president of the Mississippi Environmental Education Alliance and was the recipient of the 2008 Environmental Educator of the Year Award.

John moved to Dallas in late 2008 to accept the Lead Natural Science Educator position with the Perot Museum of Nature and Science before becoming the Director of the Wetland Center in March 2010. In August 2015, John received the New Outstanding Leader Award from the Association of Nature Center Administrators (ANCA) where he currently serves as VP of Development.

Through his leadership skills and enduring passion of man's stewardship of the Earth, he has guided the Wetland Center to become a premier example of environmental education with a strong focus on habitat and water conservation, public education, partnerships, and wetland research.



**Ann Rilling, Marketing and Communications Director for the Association of Nature Center Administrators**, a position she has held since 2007. Prior to accepting this Ann served on the ANCA board of directors for four years, serving as Vice President of Professional Services and Chair of the Publications and Leadership Award Committees. Ann's experience in the nature center profession began in 1994 as co-founder and founding Executive Director of Durango Nature Studies in Durango, Colorado. For ten years she was involved in all aspects of

starting, growing, and managing this non-profit environmental education organization including leading a capital campaign to purchase the 140-acre nature center property.

## **Appendix B**

### **Documents Provided for Consultation**

Guadalupe Blanco River Trust Board of Trustees  
Plum Creek Detailed Plan  
Plum Creek Detailed Mitigation Plan  
Conservation Easement – SH 130 Final  
Signed Inter-local Agreement  
Various Brochures of the Guadalupe Blanco River Trust  
Plum Creek Wetlands Program Planning Meeting  
Preservation Matters Newsletter of GBRT  
Power Point on SH 130 Wetland Site Intro – Overview Final

## **Appendix C**

### **People Interviewed**

Tom Bonn, Former Judge of Caldwell County

Nick Dornak, Watershed Coordinator  
Plum Creek Watershed Partnership

Oscar Fogle, GBRT Trustee  
Guadalupe-Blanco River Trust

Hoppy Haden, Candidate for County Commissioner

Johnie Haliburton  
Plum Creek Conservation District

Carrie Kasnicka, Conservation Director  
Guadalupe-Blanco River Trust

Daniel Meyer, Assistant Manager  
Plum Creek Conservation District

Denis Mueller, Trustee  
Guadalupe-Blanco River Trust

Alfredo Munoz, County Commissioner  
Caldwell County, Texas

Bobby Schmidt  
Donor, adjacent land lessee

Michael Urrutia, Director of Water Quality Services  
Guadalupe- Blanco River Authority

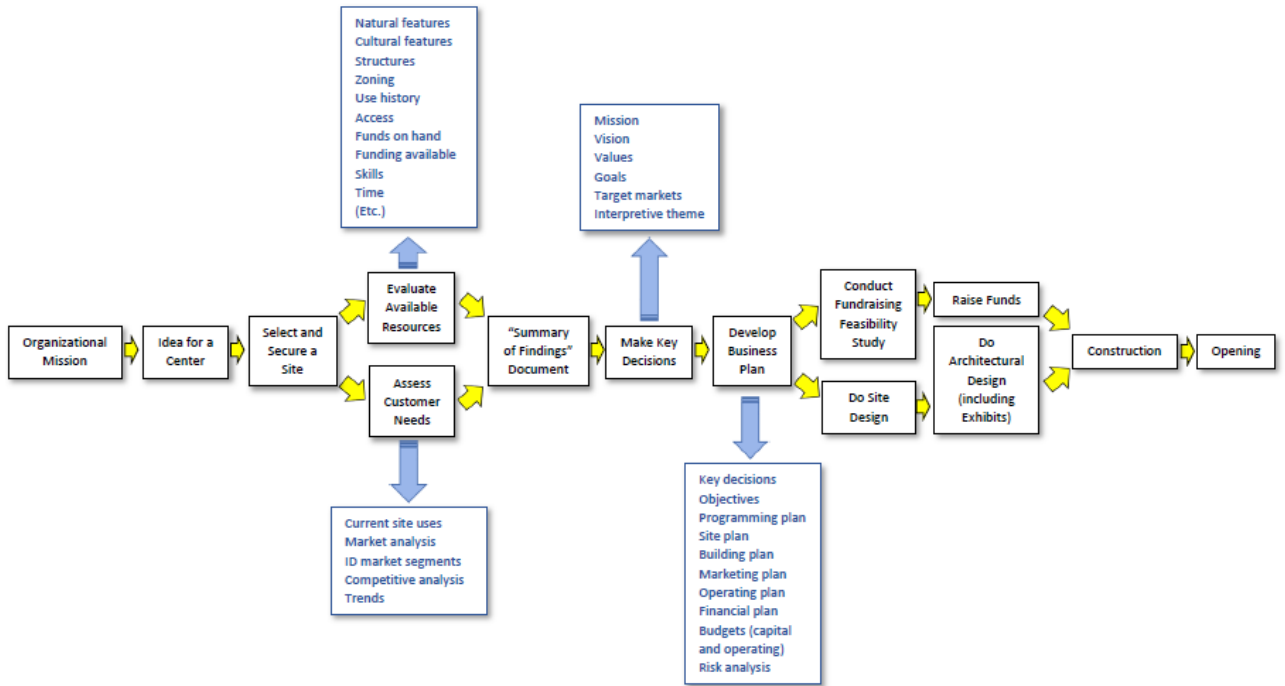
Todd Votteler, Executive Director  
Guadalupe-Blanco River Authority

Bill West, General Manager of GBRA  
Guadalupe-Blanco River Trust

Lew White, Mayor of Lockhart  
City of Lockhart

# Appendix D

## The Process of Creating a Nature Center



© 2015, David Catlin Consulting LLC



## **Appendix E – Attached**

John Bunker Sands Wetland Center  
Wetland Habitat Management Plan

Grass River Natural Area  
GRNA Comprehensive Management Plan  
GRNA Natural Resources Management Plan

## **Appendix F – Attached**

### John Bunker Sands Wetland Center

- Tuscany to Table – 2016 Invitation
- Wetland on the Grow Donor Insert Card
- Wetland on the Grow 2012 Invitation
- Wings Over the Wetland 2014 Invitation
- Wings Over the Wetland 2014 Reply Card

### Grass River Natural Area

- Annual Benefit Concert Sponsorship Brochure