

University of Wisconsin-Madison  
Lakeshore Nature Preserve  
**Strategic Plan 2020-2030**

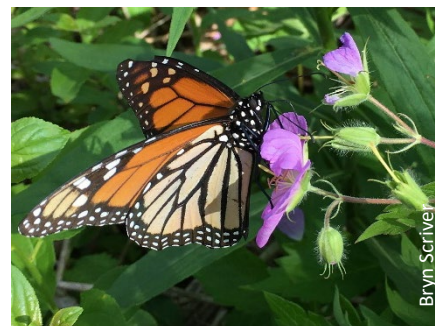


**Facilities Planning  
& Management**  
UNIVERSITY OF WISCONSIN-MADISON

Approved: June 25, 2020

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*Left to right: Jacob's ladder attracts a pollinator; a gray tree frog clings to a twig; and a monarch butterfly nectars on wild geranium.*

## Executive Summary

The Lakeshore Nature Preserve is pleased to present its first comprehensive Strategic Plan, designed to help chart the on-going use and management of the Preserve over the next 10+ years. The Plan also provides a foundation for long-term, stable and resilient support for preserving these 300 acres for use and enjoyment by students, faculty, staff, alumni, and community members for decades to come. The Strategic Plan, paid fully with private gift dollars, is a broad statement and strategic guide for continued use of these lands for teaching, research and outreach. It is not a land management plan, an ecological restoration plan, or a long-range facility improvement plan to guide or set priorities for capital projects. These elements will be addressed in a subsequent update to the 2006 Lakeshore Nature Preserve Master Plan beginning in 2020. This document is focused on the strategic vision and mission of the Preserve, solidifying its importance in supporting the teaching, research and outreach mission of the university in everything that is done on this sacred land.

The Preserve has a long history in meeting the university's mission from its inception in February 1959 as part of the "Wooded Areas" by then UW President Fred H. Harrington and the Board of Regents. In support of its initial purpose to provide land for teaching, research and outreach, currently over 70 teaching and research permits are granted annually to provide direct, hands-on learning and discovery for its many users. Research and teaching activities includes studies in ecosystem integrity, environmental services, biodiversity and ecological restoration land management practices as well as art, literature, performing arts and core biology curriculum. The Preserve also is instrumental in providing a space for wellness activities for the thousands of faculty, staff, students and visitors who rely on these lands to provide respite and relaxation, two of the key qualities of the Preserve heard in our stakeholder outreach this past year.

Prior to European-American settlement, this land was the home of Native peoples living and thriving here for more than 12,000 years. This is the ancestral home of the Ho-Chunk Nation people who named this area around Madison "Dejope" or "Teejop" for its four lakes. Evidence of long human habitation can be found throughout today's Preserve landscape, in earthen burial mounds with effigy forms constructed over 1,000 years ago, along with evidence of a prehistoric settlement along the hillside shore of this glacial lake system. There are at least 28 known archaeological sites on the campus shoreline of what is known today as Lake Mendota. Since the late 1800s land has been acquired for university teaching, research, and development by the State of Wisconsin. This document also provides a strategic opportunity to set a tone and intention to support use of the Preserve as a site for education and research with indigenous people and cultures in affirmation of "Our Shared Future" <https://oursharedfuture.wisc.edu/>.

The 300 acres of diverse biological communities that comprise the Lakeshore Nature Preserve today were acquired by the University of Wisconsin over the past 100 years, spurred on by efforts of faculty who wanted to protect the opportunity for teaching and research in this valued outdoor laboratory right on campus, by people from the university and surrounding community who treasured these lands for nature study and recreation, by environmental enthusiasts who wanted to save vital natural areas from development, and by students inspired by their memorable experiences here. The university would see many proposals for development over this century, but this land has remained tied to the need for easily accessible outdoor teaching and research

opportunities on campus. If it were not for the many interested faculty and researchers using this land on a regular basis for teaching, research and outreach over the past 10 decades, the Preserve could have been developed and lost forever.

This Strategic Plan for the Lakeshore Nature Preserve documents how the Preserve supports the university's broad mission as the university administration updates their 2015-2019 Strategic Framework for 2020-2025. One of the significant goals of this strategic planning process has been to identify ways to enhance the Preserve's contributions to excellence in teaching, research, outreach, and wellness for the university community. Much of the work in the Preserve supports and embodies the partnerships the university has with the broad community and state in The Wisconsin Idea. Preserve users and stakeholders are integral to the vibrant campus community and through this strategic planning process they have set high goals for the health of the land and the performance of the Preserve organization.

The Preserve is fortunate to have had the assistance of the UW-Madison Office of Strategic Consulting to guide us through this planning process. Both Lori Scroggs and Mari Ann Ames-Menager have brought their excellent facilitation skills and the background of prior strategic planning efforts with the UW Arboretum and other campus units to assure collaborative, inclusive discussions and fruitful planning efforts.

During the strategic planning process, nearly 600 people participated in the on-line survey, 67% representing staff, students, and faculty. Additional interested people attended facilitated stakeholder meetings and public meetings on the draft documents. It is heartening to have so many people contribute to these efforts and support the Preserve as the "largest outdoor laboratory on campus".

### **Key Takeaways from Stakeholder Focus Group Meetings**

From the notes and written information submitted, consultant-facilitators developed themes across the six focus groups that characterized the most frequent points of discussion in response to the questions.

- **Theme #1 – The Lakeshore Nature Preserve has several unique strengths**, including a long history of serving as a large outdoor laboratory providing teaching, research, outreach and wellness activities immediately adjacent to the campus along 4+ miles of the Lake Mendota shoreline.
- **Theme #2 – Responsive Preserve staff, teaching faculty, researchers, permit holders and passionate volunteers all uphold and carry out the Preserve's mission** through regular and consistent use for teaching and research, with regular communication and outreach to the university community.
- **Theme #3 – There is a need to define & systematically communicate the Preserve's identity, mission, and purpose**, highlighting its value for teaching, research, and outreach. Increased awareness supports continued growth in stakeholder engagement and alumni support. Regular feedback and assessment from the Preserve Committee, the Friends of the Lakeshore Nature Preserve, and other stakeholders will be important.
- **Theme #4 – The Lakeshore Nature Preserve requires additional resources** to succeed in its academic, research and outreach mission and to meet its on-going land management needs.
- **Theme #5 – The Lakeshore Nature Preserve, and its current/potential partners, have opportunities to build upon their common interests** in protecting and ensuring the sustainability of the Preserve.

**Stakeholders recommended short-term emphasis on several activities that fit into the above five themes.** These activities include master planning, operational planning (including strategic planning and personnel planning), branding/communications, funding/fund raising, increased student usage, continual invasive species management, land management for ecological improvement, and strategic partnerships development.

### **Online Survey Methodology and Analysis**

The purpose of the 2019 UW-Madison Visitor and Community Survey was to gather feedback regarding visitor experiences. The OSC consultants identified themes in response data regarding demographics, frequency/usage, satisfaction, mission/purpose, guiding principles, communication, and future priorities.

## **Key Takeaways from Preserve Staff Retreat**

Following the online survey and six stakeholder meetings in spring 2019, the OSC consultants facilitated a Preserve staff retreat. Staff reviewed the survey and focus group data and reflected on what the data illustrated, what it meant for the future of the Preserve and for the strategic plan, and next steps. The retreat resulted in a consensus on six strategic priorities and specific action items for accomplishing those priorities. Detailed action plans, key performance indicators, target dates, and lead staff assignments followed.

## **Identified Strategic Priorities**

### **#1 - Consolidate and clarify the mission and create a vision for the Preserve.**

- a. Refine the mission statement and create a vision
- b. Create a tagline to support the mission statement
- c. Identify priorities and measurable goals for each concept or category of the mission
- d. Increase awareness of the mission

### **#2 - Develop and implement a Communication Plan.**

- a. Determine process for Communication Plan development
- b. Develop and implement the Communication Plan
- c. Evaluate effectiveness of the Communication Plan
- d. Establish a process for updating the Communication Plan

### **#3 - Grow resources to support the mission.**

- a. Identify needs and resources
- b. Develop and implement a plan to increase overall funding
- c. Build capacity in support of the mission through volunteer and partner engagement

### **#4 - Build strategic partnerships.**

- a. Identify strategic partnerships
- b. Establish a guiding framework for working with all partners
- c. Develop and implement a plan to engage partners in mission areas
- d. Identify measures for assessing partnership effectiveness

### **#5 – Continue process improvement initiatives.**

- a. Establish a baseline of Preserve operational activity
- b. Ensure all activities align with the mission
- c. Plan for a future state of Preserve operations
- d. Transfer findings to strategic priorities addressing communication plan, growing resources & volunteer capacity, partnerships, and master plan development.

### **#6 – Update the 2006 Lakeshore Nature Preserve Master Plan.**

- a. Facilitate the Master Plan Process
- b. Measure progress toward achieving Master Plan proposals

## **Conclusion**

Preserve staff are humbled by the interest and effort of so many Preserve stakeholders who engaged in the strategic planning process and contributed their thoughts and ideas over the past year. With review by the Preserve Committee and acceptance by FP&M and university leadership, action has begun on the identified strategic priorities, including the update of the 2006 Preserve Master Plan in the coming months. The strategic planning process has resulted in an updated mission and vision (see below) for the Lakeshore Nature Preserve that were approved by the Preserve Committee at their November 2019 meeting and has focused our discussions on what the Preserve is, who it serves, and what its future will be over the decades to come.

Stakeholder input during this process has reminded staff that their shared understanding and support is key to moving the Preserve forward and to supporting the overall mission of the university. With a new, revitalized vision, mission, and re-confirmed set of core values and principles, Preserve staff and university administrators can have a shared understanding of how important the Preserve is not only for its beauty, but also for how it supports many varied users and their roles in the mission of the university, and as our largest outdoor laboratory, right on campus.



## Our Vision

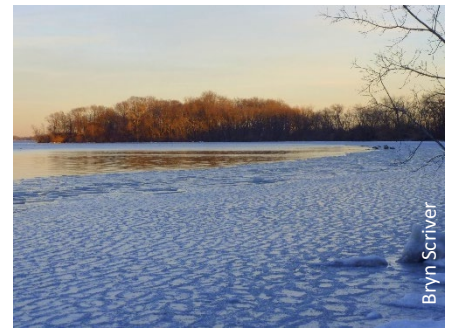
To foster biodiversity on campus and cultivate lifelong environmental engagement.

## Our Mission

The Lakeshore Nature Preserve shelters natural environments and cultural resources through active learning, research, and outreach in a place of respite and well-being.

## Next Steps

Now that the vision and mission have been approved, the next steps in the Lakeshore Nature Preserve's Strategic Plan will begin with two initial priorities: an update to the 2006 Preserve Master Plan and improvements to the Communications Plan. Those initial priorities will then support growing resources, building on existing strategic partnerships, and continuous process improvements. We look forward to the on-going work of the Preserve Committee, Preserve staff and the Preserve's many stakeholders in the coming months and years to help build a resilient plan for the largest outdoor classroom on campus.



Left to right: Spring prescribed burn in Biocore Prairie; golden oyster mushrooms cover a log; and ice forms along Lake Mendota at Picnic Point.



Left to right: A prothonotary warbler collects moss for its nest; Friends of the Lakeshore Nature Preserve volunteers check a bluebird box; and a western painted turtle suns on a log.

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## From the Director



As the Lakeshore Nature Preserve's first director and key instigator in developing a strategic plan, I am extremely pleased with this highly collaborative and cooperative effort to take time to think about the future of the Preserve. Its 300 acres have been instrumental in building the Wisconsin Idea and providing access to an outdoor laboratory filled with wonder and excitement to be shared with any who wander its trails. Researchers, faculty, staff, students and the general campus community participate in hands-on learning, active research and adaptive land management activities on a daily basis that continue to sustain the university's mission of teaching, research and outreach.

As with all units on campus, we ask that schools, colleges, and divisions look strategically at their futures before launching into a master plan that guides detailed land management and facility decisions. This strategic plan for the Lakeshore Nature Preserve sets the stage for an update to the 2006 Preserve Master Plan, giving it a basis from which to grow. The Preserve Strategic Plan achieves alignment with the overall university mission and organizational vision for continued growth and support of outdoor, experiential learning.

The Preserve is cherished by many and often remembered by our alumni as they reminisce about their days here at the University of Wisconsin-Madison. As the ancestral home of the Ho-Chunk people and in support of "our shared future" initiatives on campus, this place carries with it a deep history of connecting its people to the land. From the prehistoric effigy burial mounds, to the fire circles of today, the Preserve reaches back to all our human needs to be outside, looking to nature for rest, relaxation and creativity. Through our outreach efforts during this strategic planning process, our stakeholders have told us that this place is important for wellness and exercise where an afternoon stroll or run can clear the mind and refresh the soul as we work to solve the day's problems. Howard Temin often used the Lakeshore Path to prepare him for his day ahead in research--hence the naming of the Howard Temin Lakeshore Path.

To quote from our earlier Preserve planning process in 2006, *"The Preserve is as essential to the university as its lecture halls, laboratories, and playing fields. It contributes to the powerful sense of place and fosters an ethic of stewardship to promote mutually beneficial relationships between humans and the rest of nature."*

This sense of connection to land and its peoples in all that we do is as important today as it has been for the original land dwellers in this place. I encourage you to take the time to read through the details of this document and become familiar with the Preserve's history and its future so that we all deepen our appreciation for this place, not only for today, but for generations to come.

While the last long-term planning process for the Preserve was in 2006, the land, its programs, and its need for adaptive land management continue. Governance processes have changed, and operations have been streamlined. Even so, there is a continuous need for purposeful reflection and review. This new strategic plan, with its 6 key strategic priorities and action plans to move them forward, is the result of inclusive, introspective, and productive reflection by the Preserve staff and the many stakeholders involved in the process.

I would like to extend my heartfelt thanks to all those involved in the strategic planning process, from the university leadership who encouraged the development of this plan, to the hardworking Preserve staff (Preserve Program Manager Laura Wyatt, Outreach Specialist Bryn Scriver and Field Projects Coordinator Adam Gundlach), to Senior Landscape Architect Rhonda James for her leadership and stamina in assisting me in thinking broadly about this process; to the many stakeholders and users who provided key information to our strategic plan, including the Lakeshore Nature Preserve Committee, the UW-Madison Office of Strategic Consulting (Lori Scroggs and Mari Ann Ménager and their staff); and to our editors and collaborators on the final documents, Preserve Committee Chair Sara Hotchkiss, committee members Janet Batzli and Robert Beattie, and long-time Preserve friend and emerita Ann Burgess.

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## Acknowledgements

The Preserve worked closely with a wide variety of stakeholder groups over many months to develop this plan. Thanks and gratitude are extended to the members of the following groups for providing input that forms the basis of future priorities for the Preserve (in alphabetical order):

Allen Centennial Garden  
Army ROTC  
Biocore Bird Banding Station  
Biocore Curriculum Program  
Department of Anthropology  
Department of Botany  
Department of Forest and Wildlife Ecology  
Department of Genetics  
Dept. of Planning and Landscape Architecture  
Eagle Heights Community Gardens  
FP&M Lakeshore Nature Preserve Staff  
FP&M Office of Sustainability  
FP&M Physical Plant

FP&M Physical Plant, Grounds Department  
Friends of the Lakeshore Nature Preserve  
Lakeshore Nature Preserve Committee  
Lakeshore Nature Preserve volunteers  
Madison Audubon Society  
Nelson Institute for Environmental Studies  
Office of Strategic Consulting  
School of Education  
UW Arboretum  
UW-Madison alumni  
UW-Madison emeriti faculty & staff  
UW-Madison faculty, staff and students  
Wisconsin Foundation and Alumni Association

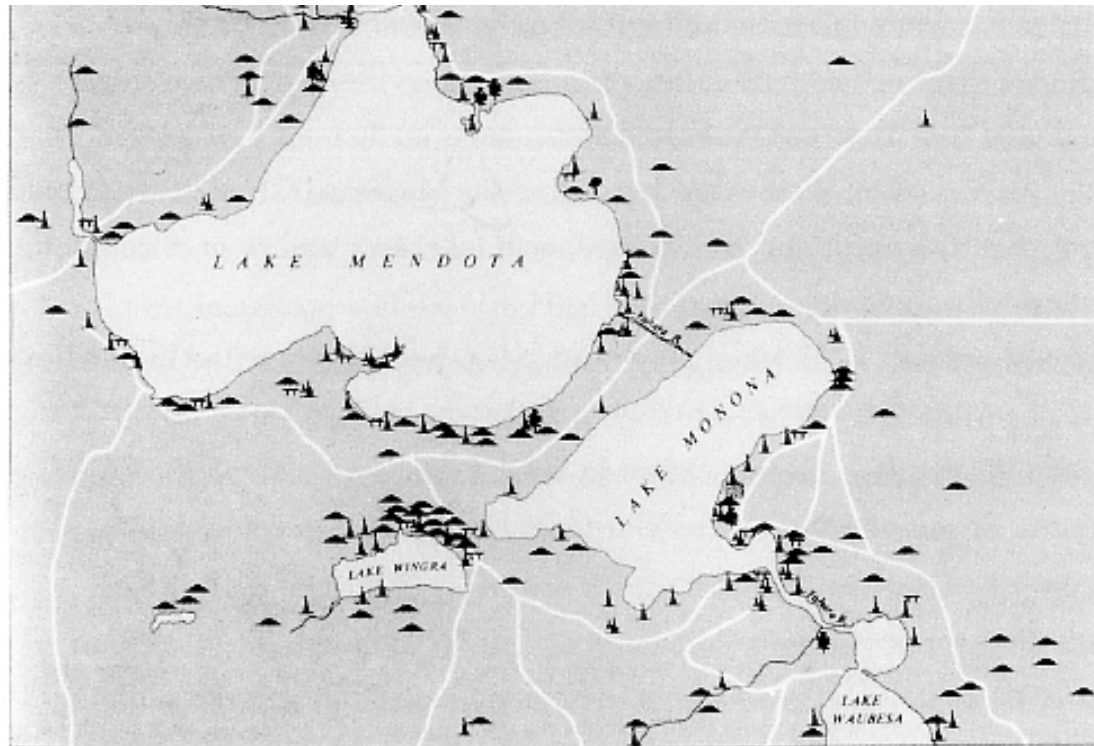


*The boundaries of the 300-acre Lakeshore Nature Preserve, June 2020.*

## Background Information

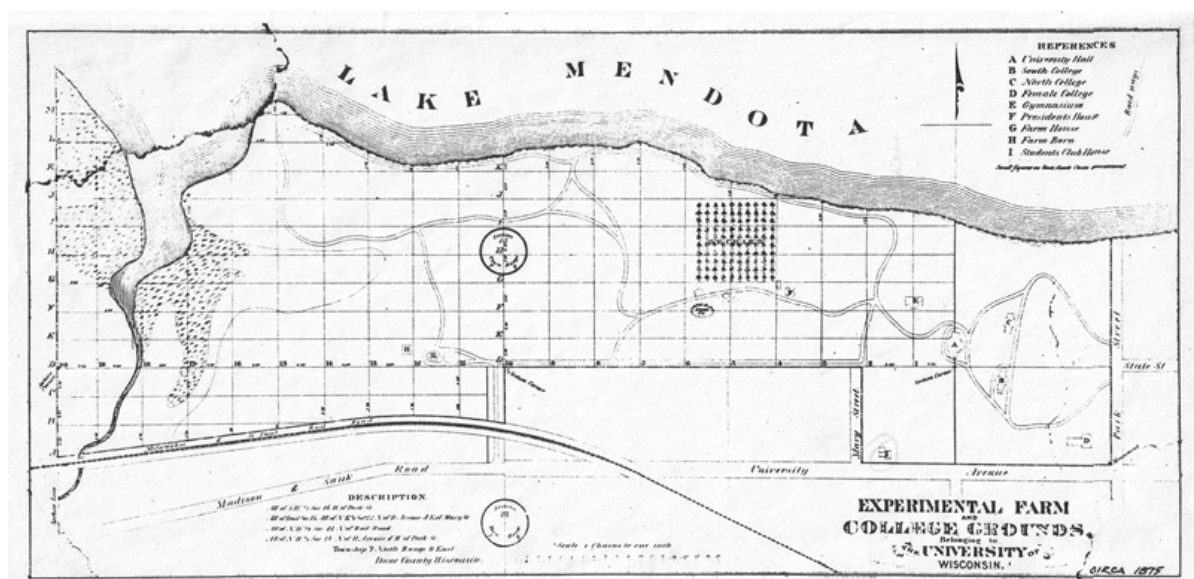


Prior to European-American settlement, this land was the home of the Ho-Chunk Nation, who named the area around Madison “Dejope” or “Teejop” for its four lakes. Evidence of long human habitation can be found throughout the Preserve in earthen burial mounds with unique effigy forms constructed over 1,000 years ago. There are at least 28 known archaeological sites on the campus shoreline of what is known today as Lake Mendota.



*Native American mounds and habitation sites in the Madison area.*

Those connected with the Preserve today, including faculty, staff and the Friends of the Lakeshore Nature Preserve, recognize that university lands are the ancestral home of the Ho-Chunk Nation and continue to honor this history in their programs and field trips. Early land records indicate that Preserve lands at the time of European settlement were mainly savanna, containing prairies and wetlands intermingled with open forests.

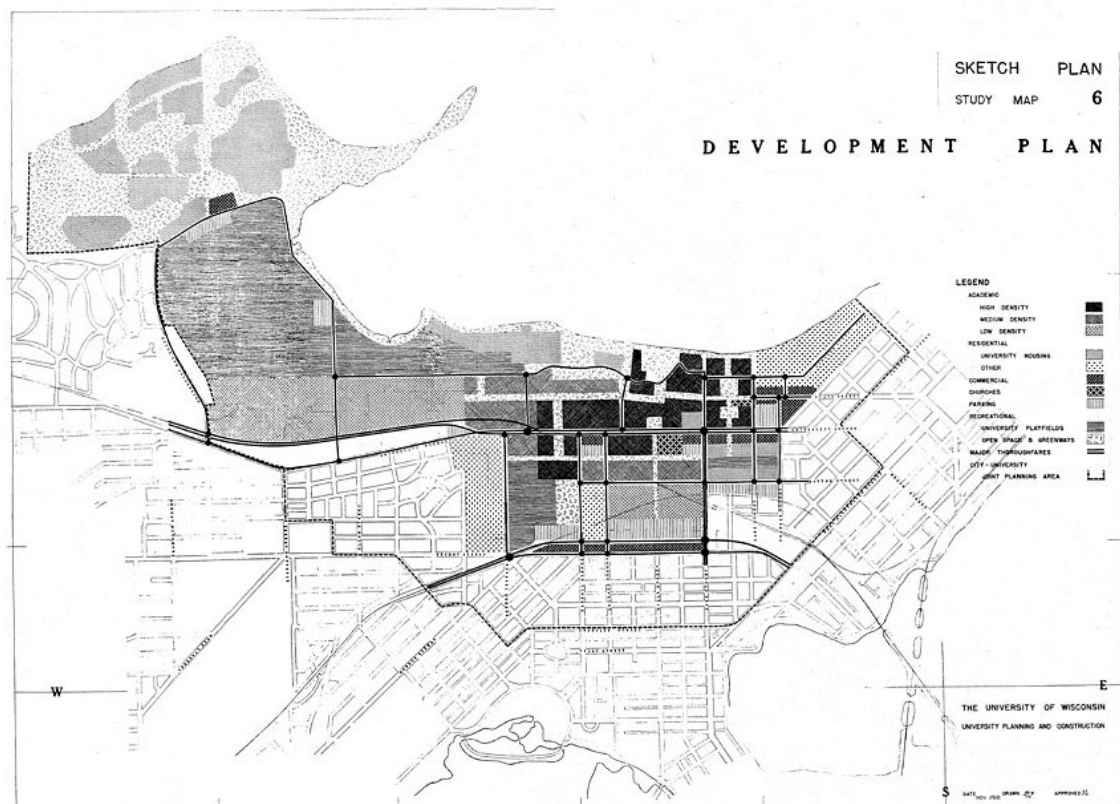


Experimental Farm & College Grounds Map, University of Wisconsin, c. 1870-1874 (Note path of Willow Creek on the far left and the orchard in the center)

Starting in the early 1900s with the wetlands along University Bay Drive and culminating with the donation of Frautschi Point in 1989, generous donors and state funds made possible the acquisition of lands that now connect

the entire shoreline from the Village of Shorewood Hills on the west to North Lake Street on the east. Some of the most well-known of these lands are Muir Woods, the Howard Temin Lakeshore Path, the Class of 1918 Marsh, Picnic Point, Bill's Woods, Biocore Prairie, Eagle Heights Community Gardens, Frautschi Point, Tent Colony Woods, Wally Bauman Woods, and Eagle Heights Woods. For a brief history of each area, see the following weblink to: [2000 Campus Natural Areas Planning Task Force Reports](#).

Referred to historically as the “Wooded Areas”, the land along the shore of Lake Mendota was designated officially by the Board of Regents and President Fred H. Harrington in February 1959 as preserved lands for teaching and research activities. A subcommittee of the UW-Madison Campus Planning Committee was codified with direct oversight by the UW Arboretum and Physical Plant staff.



*UW-Madison 1959 Sketch Plan as presented to the Board of Regents Feb. 7, 1959 officially designating land for teaching & research.*

Until the early 1960s, there unfortunately was little coordinated management of these lands by the designated units at the university. That changed in 1962 when the destruction of part of Muir Woods due to construction of the Social Science Building led to the UW Arboretum assuming more direct oversight responsibility for what became the Campus Natural Areas. In 2000, oversight was transferred to the Campus Natural Areas Committee, an unofficial shared governance committee composed of faculty, staff, and students charged with developing policies and guidelines for the stewardship of the Campus Natural Areas in conjunction with the UW-Madison's educational mission. In 2005 the name was changed to the Lakeshore Nature Preserve in order to emphasize its protected status and its location along the shore of Lake Mendota. [Benchmark documents](#) can be found on the Preserve website.

Two key documents concerning the land management activities of the Preserve are the 1996 UW-Madison Campus Natural Areas Plan by Virginia Kline and Brian Bader and the 2006 UW-Madison Lakeshore Preserve Master Plan. See the following weblinks: [1996 Kline-Bader Report](#) and [2006 Lakeshore Nature Preserve Master Plan](#). Both documents, focused on land management, have facilitated impressive growth in the use of the Preserve by faculty and academic staff for teaching and research, including extensive involvement of students in the restoration of natural communities, as well as outreach and educational programs for the larger community. They

will be used as foundational documents for the update of the 2006 Preserve Master Plan. As in the past, today the Preserve is home to over 70 teaching and research permits granted annually to provide direct, hands-on learning, discovery, and wellness activities for the thousands of faculty, staff, students and visitors. Below are a few examples of recent teaching and research projects:

- The **Biocore Prairie** is the result of an effort begun in 1997 by students and staff from the university's undergraduate honors biology program that has succeeded in transforming an abandoned weedy agricultural field into a diverse tallgrass prairie through adaptive restoration, education and research. The prairie is an outdoor laboratory for two Biocore lab courses and for summer independent research projects. In addition, the Biocore Prairie is a site for collaborative teaching, research and outreach support for many other units across the university.
- The **Urban Canid Project** is a long-term study of the interactions between red fox and coyotes and an investigation of their health and diet that engages the public as well as students from the Department of Wildlife and Forest Ecology.
- **Archeology Kilns** near the BioCore Prairie are built and fired each summer as students from the Department of Anthropology engage in experimental archaeological research to understand the ways in which materials are processed and discarded and eventually become a part of the archaeological record.
- **FH King Students for Sustainable Agriculture** is a student-run organization that strives to connect land, food, and the Madison community as they demonstrate alternative agricultural techniques in their garden near Eagle Heights

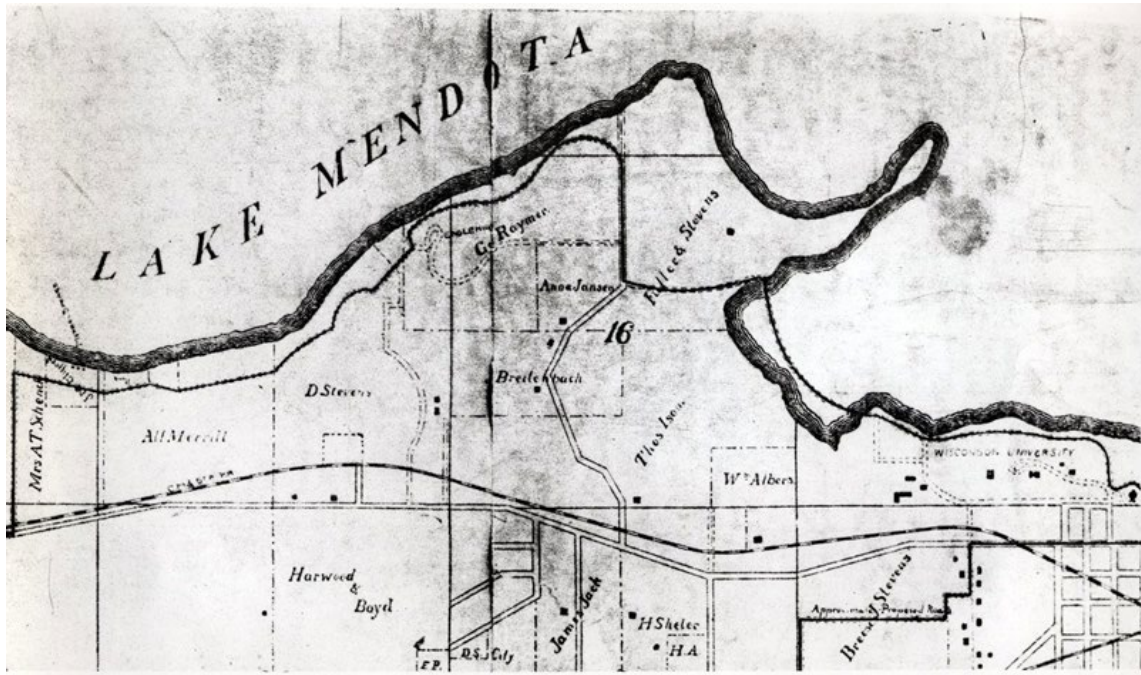


Left to right: UW Urban canid researchers prepare to radio collar a fox, Ho-Chunk Thundercloud Singers share songs at the tip of Picnic Point, archaeological research and teaching pits on Picnic Point.



Left to right: The First Nations Cultural Landscape Tour showcases campus effigy mounds; students harvest food in the F.H. King student farm; the Ancient Technology and Invention class creates and fires pottery in a class-built kiln.





Madison Park & Pleasure Drive Association Plat Map, 1892

The 300-acre Preserve came into being over many decades of land acquisition aiming to address key teaching and research needs established early in the life of the university. From a Pharmacy Garden for the study of pharmaceutical plants, to the study of freshwater lakes (limnology) and waterlily research in University Bay, hundreds of students and faculty have wandered these lands for teaching and research. Soil pits in Bill's Woods are used to teach soil stratification and how time has changed these lands. Buried animals are studied to determine decomposition rates by microbes in these soils. Tree canopies are studied for their ability to sequester carbon and manage stormwater runoff. Geology students study glacial till along with their colleagues studying ecological restoration and land management. All working with each other to understand how these academic disciplines are consistently intertwined. Integrative Biology graduate students study snowpack and the impact of rising winter temperatures on prairie plants in the Biocore Prairie. This is not common for many of our peers and having a 300-acre resource available immediately adjacent and on campus, is a significant resource for UW-Madison. All of this happens here. In this place. At this university. On campus. In the Lakeshore Nature Preserve.





One of the first key milestones in the history of the Preserve was the construction of the Social Science building in what was called John [Muir Woods](#), north of Bascom Hall, in 1962. After significant outcry from faculty, staff and students, the university created the “Wooded Areas Committee” and later that year the creation of the “Campus Biological Areas Committee” under the powerful Campus Planning Committee. During that discussion, the UW Arboretum was suggested for oversight responsibility for what would become the Campus Natural Areas (and later named the Lakeshore Nature Preserve in 2006). Five years later, in 1967, the Arboretum fully assumed the land management responsibilities as approved by the Campus Planning Committee in 1962.



*View of Muir Woods, ca. 1940. Note woods north of the Carillon Tower, prior to the construction of the Sewell Social Science Building. (UW-Archives, series8/14, CLP-A0154)*



Hearing the outcry from many local and university environmentalists, including alumni, over the Social Science development in Muir Woods, the Class of 1918 wanted to assure the campus was doing the right thing in other parts of the campus. Having celebrated their 50<sup>th</sup> graduation anniversary in 1968, they provided funding for a mitigation project that eventually became known as the “Class of 1918 Marsh”. The marsh restoration project opened in 1972 under the direction of James Hall Zimmerman (aka “Jim Zim”), a naturalist at the UW Arboretum who had campaigned to save the marsh on the west end of campus after it was drained and utilized for a failed attempt at agricultural research. Zimmerman later joined the UW-Madison Department of Landscape Architecture and developed a course in wetland ecology. He became a founding member of the Wisconsin Wetlands Association and used the Class of 1918 Marsh as one of his prized field laboratories.

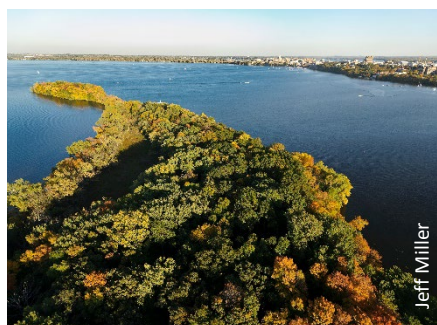
Also in the 1960s and 1970s, long-range planning for the university began in earnest. Planning for campus development had begun as early as 1850, and a comprehensive development plan was written in 1908, with updates in the 1920s and early 1940s. But in the 1960s, with the booming student population, plans needed to be made for numerous buildings to meet the university's growth projections. In those plans, reference is made to the "Green Line", a line drawn from Colgate Road in the Village of Shorewood Hills (along today's bike path north of the Waisman Center), east to Lake Mendota and University Bay. The so-called Green Line was a demarcation zone suggesting minimal development to the north and more directed development to the south, including what would become the west Health Science campus and the massive UW Health hospital complex.

Land north of the Green Line was also less desirable for development, with its wet, former marshland soils east of University Bay Drive (now recreational fields) and the steep slopes of Eagle Heights. Housing that became the Eagle Heights University Apartments was developed to the north of University Bay Drive, on the former George Raymer farmland. Raymer, a prominent local landowner and newspaper editor, donated land to the Madison Park and Pleasure Drive Association, the forerunner of the Madison Parks System that created pleasure drives across the city and through the university campus. Raymer's former farmland would eventually house the beloved "Tent Colony" community that has its own history and legacy along the south shore of Lake Mendota, all within the Lakeshore Nature Preserve. Wally Bauman Woods would be named in 1984 for Dane County Supervisor and former Middleton mayor Walter R. "Wally" Bauman, who helped make possible the purchase of land west of Tent Colony Woods, now the western-most tip of the Preserve.

In the late 1980s, the former Jackson family home on Second Point would be purchased and donated to the university by the Frautschi family, finally connecting the entire shoreline from the Village of Shorewood Hills on the west to Lake Street on the east. In order to protect the land from being subdivided and sold for housing development, Walter Frautschi's sons, John and Jerry, provided the \$1.5 million needed to acquire this land and protect it for all time by giving it to the university.

Current campus community discussions recognize the Preserve's long history with the Ho-Chunk Nation and ties to their ancestral home and effigy mound culture, Preserve staff and university leadership acknowledge that more work needs to be done. In 2019 "Our Shared Future" debuted on campus, publicly acknowledging the connectedness of this place to those that have lived here for centuries. Tours of the mounds and the history of this place are often given to school children of all ages and to UW-Madison students as an introduction to the university. Annually, Wisconsin Idea Tour groups meet here on Picnic Point to learn of the Ho-Chunk culture and how the university and the Preserve are a part of this long human history.

Teaching and research about the effigy mound culture, the Ho-Chunk habitations, and their many historic accounts of using this land show how people, land and nature have come together in this place to learn, adapt, share, and build community. This is goal of continual investigation, research, teaching and learning is intrinsic to Lakeshore Nature Preserve's mission and one which supports the Wisconsin Idea to engage and share knowledge outside of the classroom for the entire university community.



Left to right: View looking southeast over Picnic Point towards the Capitol; Ecology students conduct annual bird surveys on Picnic Point; sandhill cranes return each year to the Preserve.

## The Lakeshore Nature Preserve Committee

The Lakeshore Nature Preserve Committee helps to link the management of the Preserve with the university's educational and research goals. While not an official shared governance committee (as defined under Faculty Policies & Procedures Chapter 6), the Lakeshore Nature Preserve Committee was established on September 5, 2000 by Provost John Wiley after the Preserve land had been under the management of the UW Arboretum Committee for many years. The initial broad charter notes from the provost to the committee noted that the committee was charged "to ensure the integrity of these cherished campus resources through the provision of necessary and appropriate oversight, policies, guidelines, stewardship and management."

Facilities Planning and Management (FP&M) has been assigned by the university administration to manage the 300-acre Preserve and consults with the Preserve Committee for advice on policy, annual work plans, and budgets. The Preserve Committee brings experience in teaching, learning, and research and assists with undergraduate research grant review and recommendations as well as with review and advice on major capital projects that impact the Preserve. In the event of any conflict in decision-making, the Vice Chancellor for Finance and Administration will also seek the advice of the shared governance Campus Planning Committee before making a final decision.

The Preserve Committee consists of three faculty members, three academic staff members, and three students with the director of the UW Arboretum and the Associate Vice Chancellor for FP&M (or their designee) serving as ex-officio members. The Committee may also have other non-voting consultants. Currently, the Committee includes the director of University Apartments and the president of the Friends of the Lakeshore Nature Preserve as ex-officio non-voting members. Faculty and academic staff appointments are typically for three years, with the option of reappointment to a second three-year term. Members serve until their replacements are appointed. Eligibility for reappointment after two three-year terms has a minimum three-year waiting period. The Preserve Committee typically meets on a monthly basis during the academic year, with administrative support by staff in Facilities Planning & Management.

The Preserve Committee initially reported to the Provost but is currently (as of Fall 2018) an advisory body to the Associate Vice Chancellor of FP&M, who represents the Vice Chancellor for Finance & Administration. The 2018 change occurred under the direction of provost Sarah Mangelsdorf under a campus-wide process to streamline committee activities under her purview at the university. This revision placed the Arboretum Committee and the Preserve Committee in parallel administrative roles, with the Arboretum Committee advising the Vice Chancellor for Research & Graduate Education and the Preserve Committee advising the Vice Chancellor for Finance & Administration. The director of the Preserve sits on the Arboretum Committee and the director of the Arboretum sits on the Preserve Committee to ensure coordination and frequent communication.



*Volunteers perform many management activities to help restore and maintain Preserve lands, including cutting and pulling invasive plants.*



## The Strategic Planning Process

### ***Overview of the Process***

The Lakeshore Nature Preserve strategic planning process began in the first quarter of 2019, with completion targeted for December 2019. This schedule allowed the Core Team to gather input from key stakeholders during the Spring 2019 semester (January 22 through May 6, 2019). A semi-final draft deadline for Fall 2019 allowed the team to finalize a plan draft for review by governance bodies and by campus leadership prior to planned approval, release and implementation in 2020.

### ***Scope of Work***

The Lakeshore Nature Preserve Core Planning Team developed the strategic plan through collaborative efforts with the University of Wisconsin–Madison Office of Strategic Consulting and Preserve stakeholders. Consultants facilitated meetings and engagements with key stakeholders or stakeholder groups and administered a public survey to further inform the strategic plan. The consultants also facilitated a planning retreat, at which Preserve staff reviewed, analyzed and synthesized stakeholder feedback, to identify the Preserve’s desired impact and draft strategic priorities for the future. Core Team members and consultants then crafted the written plan draft for review and approval by governance groups and campus leadership.

### ***Roles and Responsibilities***

To promote and illustrate the collaborative nature of the strategic planning process, Core Team Members outlined the roles of the integral leadership groups and key stakeholders and their responsibilities during the strategic planning process.

#### *Roles*

**Office of Strategic Consulting (OSC)** served as the consultant with expertise in the strategic planning process and facilitation of meetings.

**Core Planning Team** (Preserve Director, Preserve Program Manager, Senior Landscape Architect, Office of Strategic Planning Facilitator) worked directly with OSC throughout the process. Through discussions they assisted in interpreting and distilling the information gathered. This group also kept the process on schedule.

**Preserve Leadership** (Preserve Director, Preserve Program Manager) managed the strategic planning process and communicated with the Executive Leadership and the Preserve Committee throughout the process.

**Executive Leadership** (Vice Chancellor for Finance & Administration, Associate Vice Chancellor for FP&M, University Architect, Preserve Director) were kept informed of major concepts and directions during the process. This group has final discretion and decision authority for approval of the strategic plan and direction for Preserve activities.

**Preserve staff representatives** (Field Projects Coordinator, Volunteer and Outreach Coordinator) shared their expertise and observations with the Core Planning Team and participated in a staff retreat in which the goals of the strategic planning process were reviewed and the desired impacts to existing and future operating functions and management activities were discussed.

**Preserve Committee** was represented by the committee chair in the kickoff meeting and all Committee members were invited to participate in the various stakeholder focus group meetings. The Preserve Committee participated in the mission and vision creation. Regular reports by Preserve Leadership kept the Preserve Committee involved throughout the process. (See more on the Preserve Committee under “Background” above.)

**Friends of the Lakeshore Nature Preserve** were represented by the president of the board in the kickoff meeting and were invited to participate in stakeholder focus group meetings. They were kept informed throughout the process through their representation on the Preserve Committee.

**Stakeholders** are people from the many groups on and around campus that utilize the Preserve for a variety of activities. These groups were invited to participate through stakeholder focus group meetings and online surveys.



## Responsibilities

Lakeshore Nature Preserve	Office of Strategic Consulting
Together, articulate a collaborative, impact-driven strategic planning process. Work collaboratively to identify and contact key stakeholders.	
Attend and arrange meetings or engagements with key stakeholders or stakeholder groups.	Develop methods to collect and analyze information and data from key organizational stakeholders in cooperation and collaboration with Preserve Leadership & Core Planning Team.
In cooperation with Preserve Leadership and Consultant, analyze and synthesize data and information collected from key stakeholders to identify potential impacts.	Facilitate meetings/engagements with key stakeholders or stakeholder groups as agreed with Core Planning Team.
Schedule a Planning Retreat for Preserve Staff, resulting in identification of desired impacts, necessary conditions, and core strategies.	Convene a Planning Retreat for the Preserve Staff to allow collaborative review of stakeholder analysis, themes and to: <ul style="list-style-type: none"> <li>• Identify desired impact</li> <li>• Identify the necessary conditions to achieve this impact</li> <li>• Define strategies that will be critical to produce the necessary conditions.</li> </ul>
Provide regular updates to Executive Leadership and the Preserve Committee to keep them informed and engaged in the process.	Develop written plan draft(s) that reflect the core strategies and enabling conditions to reach the desired impact for review by the Core Planning Team.
Review written plan draft(s) that reflect the core strategies and enabling conditions to reach the desired impact.	Complete final written plan, design visual materials presenting desire impacts, and outline implementation milestones in collaboration with Preserve Leadership and the Core Planning Team.
Contribute to and review final written plan and desired impact and note milestones for successful implementation.	
Present Strategic Plan to stakeholders.	
Implement the Strategic Plan.	

## Strategic Planning Process Goals and Schedule

The Preserve Leadership and Core Team developed the Strategic Planning Process Goals and Schedule to maximize input and collaboration, while maintaining an efficient planning schedule. The Preserve Leadership shared the proposed goals and schedule at the initial Core Team Meeting and at the Kick-off Meeting to achieve consensus on the goals and to create momentum for the proposed strategic planning schedule.

### Strategic Planning Process Goals

1. Provide a strategic direction to guide the use and management of the Lakeshore Nature Preserve over the next 10+ years.
2. Identify key stakeholders, both on and off campus; assure stakeholders are fully engaged in the strategic planning process.
3. Develop and facilitate stakeholder engagement processes that allow for the collection of ideas, information and data needed to develop the strategic plan. Engagement may be in the form of user surveys, roundtable discussions, public meetings and/or focus group meetings.

4. Focus the strategic planning process on desired impacts and how to obtain those impacts in the coming years. Document the critical importance of the Preserve to the research, teaching, and outreach mission of the university.
5. Facilitate a Preserve staff retreat to work on details of the draft strategic plan and gain their input, knowledge and expectations for the Preserve.
6. Review and update as necessary the 2006 Mission, Vision, Core Values and Guiding Principles for the Preserve.
7. Complete a SWOT analysis and services gap analysis to document Strengths, Weaknesses, Opportunities and Threats to the future of the Lakeshore Nature Preserve.
8. Provide a basis for a 2020 update of the 2006 Lakeshore Nature Preserve Facilities Master Plan.
9. Define and document clear roles and responsibilities of staff, Preserve Committee, support groups, and partners.
10. Develop a written strategic plan that defines actionable items for moving the strategic plan forward and gaining approval and support from university leadership.



## Strategic Planning Process Schedule

Milestone	Date
Kick-off Meeting	March 12, 2019
FP&M Executive Leadership Review	March 2019
Launch Stakeholder Survey	April 2019
Preserve Committee Focus Group	April 18, 2019
Friends Focus Group Meeting	April 29, 2019
Stakeholder Focus Group Meetings	April-May, 2019
Draft Summary of Data Collected	Mid-May 2019
Preserve Staff Retreat	June 6, 2019
Summary of Findings & Draft Outline of Strategic Plan	June 18, 2019
Initial draft of strategic plan [internal draft review]	July 2019
FP&M Executive Leadership Status Report	August 2019
Draft Strategic Plan Shared with Preserve Committee	November 2019
Revised Draft Shared with Preserve Committee	December 2019
FP&M Executive Leadership Review & Sign-off	November 2019
Draft presented to the Preserve Committee	December 2019
Public Information Meetings	November 2019
Final documents delivered to FP&M	December 2019
Draft reviewed by the Preserve Committee	April 15, 2020
Final documents uploaded to Preserve website by Preserve Staff	Fall 2020
Action begins on recommendations provided in the Strategic Plan	Summer 2020
Work begins on the update of the 2006 Preserve Master Plan	Fall 2020



View looking south over the Eagle Heights Community Gardens, Bill's Woods & Class of 1918 Marsh.



## Stakeholder Engagement

### ***Stakeholder Identification and Analysis***

The Core Planning Team identified key stakeholder groups and analyzed the relationship of each of these groups to the Preserve. Through this exercise, the Core Team distinguished the varied types of usage and users of the Preserve and determined whom to invite to focus group meetings.

Three of the six focus groups were comprised of specific stakeholders including the Preserve Staff, the Preserve Committee, and the Friends of the Lakeshore Nature Preserve. The Core Team also invited individual stakeholders representing university academic departments, UW Arboretum, Allen Centennial Gardens, University Housing, UW Police, Facilities Planning & Management Physical Plant-Grounds, Associated Students of Madison (ASM), student volunteers, neighbors, and City and County governmental and nonprofit organizations to participate in three focus groups, each comprised of a mix of stakeholders. Each focus group responded to the same set of questions, and each focus group participant received the list of questions in advance via email [See Appendix A for Focus Group Questions]. Consultant-facilitators noted response topics on flip charts, and participants were invited to submit written responses to add or clarify responses.

### ***Key Takeaways from Stakeholder Engagement Meetings***

From the notes and written information submitted, the consultants developed themes across the six focus groups that characterized the most frequent points of discussion in response to the questions. A summary of the themes appears below (See Appendix B-Themes from Lakeshore Nature Preserve Focus Groups, for the full text).

<b>Themes-in-Brief from Lakeshore Nature Preserve Focus Groups</b>	
<b>Theme #1 - The Lakeshore Nature Preserve has several unique strengths.</b>	<ul style="list-style-type: none"><li>• Proximate location &amp; immediate connection to the main campus</li><li>• Large research laboratory, educational asset &amp; wellness resource</li><li>• Natural areas stretching along campus &amp; buffering 4+ miles of Lake Mendota shoreline</li></ul>
<b>Theme #2 - Responsive staff and passionate volunteers uphold &amp; deploy our mission.</b>	<ul style="list-style-type: none"><li>• Regular &amp; consistent use of the Preserve for teaching and research</li><li>• Managing the Preserve for accessibility and multiple uses</li><li>• Regular communication &amp; outreach within the university and with our varied external partners</li></ul>
<b>Theme #3 - Define &amp; systematically communicate our identity, mission, and purpose.</b>	<ul style="list-style-type: none"><li>• Achieve greater brand recognition</li><li>• Highlight the value of teaching/research/outreach to the university and broader Madison community</li><li>• Increase faculty/staff and student awareness of the Preserve supporting continued growth in stakeholder and alumni support</li></ul>
<b>Theme #4 – The Lakeshore Nature Preserve requires additional resources to succeed in its mission.</b>	<ul style="list-style-type: none"><li>• Additional funding is needed to support the academic, research and outreach mission of the university.</li><li>• Additional resources are needed to meet on-going land management objectives.</li></ul>
<b>Theme #5 - The Lakeshore Nature Preserve, and its current/potential partners, have opportunities to build upon their common interests in protecting and ensuring the sustainability of the Preserve.</b>	<ul style="list-style-type: none"><li>• Public-private partnerships can be instrumental to success, with on-going attention to the interests, visions and regulatory requirements of each organization.</li></ul>

**Stakeholders recommended short-term emphasis on several activities that fit into the above five themes.** These activities include master planning, operational planning (including strategic planning and personnel planning), branding/communications, funding/fund raising, increased student usage, continual invasive species management, land management for ecological improvement, and strategic partnerships development.





Students, faculty, staff, and volunteers conduct research and outreach in the Preserve.

## Online Survey Methodology and Results

The purpose of the 2019 UW-Madison Visitor and Community Survey was to document existing conditions and gather feedback regarding visitor experience and campus community awareness, especially students, of the Preserve’s mission and work.

The questions for the Survey were developed collaboratively by Preserve staff in consultation with the Office of Strategic Consulting. [See Appendix C for Survey Questions.] The survey addressed six categories including:

- Demographics
- Frequency/Usage
- Satisfaction
- Mission/Purpose
- Guiding Principles
- Communication & Future Priorities

Effort was taken to make the question results actionable. To encourage participation, the overall number of questions was limited to twenty-four. The online survey was implemented using the UW-Madison Qualtrics Survey Hosting Service.

The survey ran from April 8, 2019 through May 6, 2019. The survey was promoted using Preserve communications outlets (website, e-newsletter), UW-Madison communications outlets, as well as by direct engagement of Preserve groups by staff outreach.

A total of 596 surveys were submitted. Partially complete responses were retained in the dataset. Responses to five open-ended text questions were categorized for analysis by Office of Strategic Consulting staff.

Summary of Results of the Lakeshore Nature Preserve Online Survey	
<b>Demographics</b>	<ul style="list-style-type: none"> <li>• 65% in the age ranges of 18-30 and 51-65.</li> <li>• 60% female, 40% male</li> <li>• 80% of respondents were staff, students, alumni and faculty</li> <li>• Survey respondents were primarily white (91%)</li> <li>• Current (Spring 2019) enrollment: 51% female/48% male; total of 42,086 students of whom 15% are minorities.</li> <li>• Dane County’s minority population is approximately 11%</li> </ul>
<b>Frequency/Usage</b>	<ul style="list-style-type: none"> <li>• Over half of respondents visit more than ten times per year</li> <li>• All Preserve areas were visited. Top destination: Picnic Point</li> <li>• Preserve is used for a wide variety of activities: “enjoyed nature/took a break” as highest use then “used trails.”</li> </ul>
<b>Satisfaction Questions</b>	<ul style="list-style-type: none"> <li>• Trail system, trail navigation and fire circles were ranked high for satisfaction</li> <li>• Many respondents noted a need for interpretation, improved parking and restrooms as well as fewer disturbances such as noise, signs and vehicles.</li> <li>• Public Outreach Programs received mostly “neither satisfied nor dissatisfied” responses</li> </ul>
<b>Mission/Purpose</b>	

- Only 13% indicated they were “not familiar at all” with the mission
- 86% found the Mission Statement “somewhat or very easy to understand”
- 87% had “some or full confidence” that the Preserve is meeting its mission
- Most suggestions to advance the mission related to promoting awareness and protecting the environment

#### **Guiding Principles**

- Only 1% suggested that land stewardship goals are being met “not well at all.”
- “Very well” was the top ranking for all ten questions related to the Preserve addressing its planning and management objectives.

#### **Communication & Future Priorities**

- Top sources of information: “UW-Madison website/other UW communications” & “word of mouth”
- Top challenge to Preserve’s restoration, preservation & educational work: “Invasive species”
- What makes the Preserve valuable? “provides a place for respite and relaxation”; “provides a place for environmentally friendly recreation”
- What do respondents personally value most about the Preserve? “source of wellness, respite, quiet & beauty”

### ***Preserve Staff Retreat***

Following the administration of the online survey and stakeholder focus groups from April – May 2019, the consultants from the Office of Strategic Consulting facilitated a retreat for the Preserve staff (Gary Brown, Laura Wyatt, Bryn Scriver, Adam Gundlach and Rhonda James). The agenda included review of the initial data collected and analyzed by the OSC consultants through the stakeholder focus groups and the online survey. Preserve staff reflected on what the data illustrated, what it meant for the future of the Preserve and for the strategic plan, and what steps should be followed to address the broad themes coming from the stakeholders.

The staff retreat resulted in consensus on the following six strategic priorities and a brainstorming list of initial actions needed to progress towards these priorities.

### **Strategic Priorities to Advancement in the Strategic Planning Process**

1. Consolidate and clarify the mission and create a vision for the Preserve.
2. Develop and implement a communications plan.
3. Grow resources to support the mission.
4. Build strategic partnerships.
5. Continue process improvement initiatives.
6. Update the 2006 Lakeshore Nature Preserve Facilities Master Plan.



Left to right: Volunteers assist prescribed fire professionals to conduct a controlled burn in Biocore Prairie; an AmeriCorps NCCC crew member uses a chainsaw to remove invasive brush; Prairie Partners student interns survey vegetation in Bill's Woods.

## Strengths, Weaknesses, Opportunities and Threats (SWOT) Analysis

Strengths and weaknesses are internal to the organization, and the organization has some control over these items. Opportunities and threats are external to the organization, happening around the organization. The organization can take advantage of opportunities and can protect against threats but cannot change them. The SWOT table summarizes information gathered through the Strategic Planning process during the stakeholder meetings, presentations and on-line stakeholder survey.

Strengths	Weaknesses
<ul style="list-style-type: none"> <li>• Location – proximity to campus, city, lake</li> <li>• Unique cultural history</li> <li>• Connection to university – resource to campus, new students every year, unique opportunity for students, diverse faculty, opportunity to connect with broader community</li> <li>• Diverse ecosystems, habitats, species (birds), plants</li> <li>• Health/well-being asset to campus community</li> <li>• Helps with preservation of watershed</li> <li>• Powerful teaching tool and research asset</li> <li>• Passion &amp; commitment by knowledgeable Preserve staff &amp; volunteers</li> </ul>	<ul style="list-style-type: none"> <li>• Brand recognition is poor</li> <li>• Mission statement is long and not easily used or memorable</li> <li>• Preserve does not have a vision statement</li> <li>• Confusion over role of Friends vs the Preserve staff</li> <li>• Master Plan is 14 years old and needs updating</li> <li>• Lack of specific land management plans for all areas</li> <li>• Distributed storage locations cause inefficient operations</li> <li>• Not using full potential of technology e.g. apps, virtual field trip</li> <li>• Restroom facilities are minimal</li> <li>• Lack of signage – educational, informative</li> </ul>
Opportunities	Threats
<ul style="list-style-type: none"> <li>• Preserve is an attractive cause for fundraising</li> <li>• Many possible strategic partnerships - Outdoor UW, Friends, Eagle Heights community, Ho Chunk Nation, SOAR, UW Housing, Rec-Well, etc.</li> <li>• Many university academic departments could benefit from teaching outdoors</li> <li>• Recent increase in the acknowledgement of natural areas as places of well-being for people</li> <li>• Preserve staff has the knowledge to move to larger-scale management activities</li> <li>• Places are needed for long-term research in climate change, ecosystem services, ecological restoration</li> </ul>	<ul style="list-style-type: none"> <li>• Lack of resources - understaffed and underfunded</li> <li>• Climate change, erosion issues, invasive species</li> <li>• Scarce-resource mentality limits big thinking</li> <li>• Potential use of the area for building development</li> <li>• Parking is difficult/not enough</li> <li>• Incompatible uses in the Preserve: Lot 34, snow pile, Grounds storage</li> <li>• More areas to manage without additional resources, stormwater basins and upcoming Observatory Hill, Willow Creek</li> </ul>

**The Preserve's strengths can be used to take advantage of opportunities and fight against threats.** The location directly adjacent to and on the campus is key to its use for teaching, research, respite and sensitive use. The resources of the university should be able to be accessed for creating a plan to communicate about the Preserve, its availability to the campus community, and its value to the environment as well as the sense of place and brand of the university. The partnership and fundraising opportunities can be used to improve internal weaknesses, especially those of staff and funding challenges. This information was used to inform the staff as strategic priorities were discussed.

## Lakeshore Nature Preserve Vision, Mission, Core Values/Guiding Principles

In 2006, during the Preserve Master Plan process, the first mission statement was developed for the Lakeshore Nature Preserve. It served for well over 13 years but was reviewed and considered a bit long and cumbersome for the current needs of the university, the committee and staff.

The 2006 Preserve Mission Statement:

*The University of Wisconsin-Madison Lakeshore Nature Preserve permanently protects the undeveloped lands along the shore of Lake Mendota where members of the campus community have long experienced the intellectual and aesthetic benefits of interacting with the natural world. The Preserve shelters biologically significant plant and animal communities for teaching, research, outreach, and environmentally sensitive use, and safeguards beloved cultural landscapes. The Preserve is as essential to the university as its lecture halls, laboratories, and playing fields. It contributes to a powerful sense of place and fosters an ethic of stewardship to promote mutually beneficial relationships between humans and the rest of nature.*

Brainstorming, discussion and refinement occurred at the October and November 2019 Lakeshore Nature Preserve Committee meetings to solidify the following vision and mission statements for the Lakeshore Nature Preserve. On November 22, 2019 the Lakeshore Nature Preserve Committee approved the following Vision and Mission statements:

### Our Vision

*To foster biodiversity on campus and cultivate lifelong environmental engagement.*

### Our Mission

*The Lakeshore Nature Preserve shelters natural environments and cultural resources through active learning, research, and outreach in a place of respite and well-being.*

### Our Core Values/Guiding Principles

Guiding principles for the Lakeshore Nature Preserve were drafted early in the development of the 2006 Lakeshore Nature Preserve Master Plan and reviewed during this 2019 strategic planning process. The Lakeshore Nature Preserve Committee and Preserve staff agreed that these guiding principles were still applicable and made the decision to continue to use these statements moving forward in the strategic planning process. They will be reviewed again as the update to the 2006 Preserve Master Plan is initiated.

The core values/guiding principles of the Lakeshore Nature Preserve are as follows:

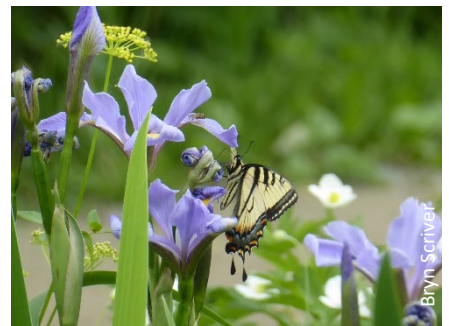
- 1) The underlying principles of ecology and conservation biology should guide Preserve management decisions, promoting protection of remnant communities, corridors, and large contiguous blocks of habitat; removal of invasive species; and encouragement of natural processes and native communities.
- 2) The Lakeshore Nature Preserve should be a showcase for rethinking a city's relationship to the natural systems in which it is embedded to make human and non-human communities more mutually supportive and sustainable.
- 3) The Preserve should be interpreted so that visitors will better understand the history of these lands, their human uses, and the changing natural communities that have existed here over time.
- 4) The Preserve should provide a retreat where people can contemplate their past, present, and future place in the larger web of life.
- 5) The Preserve should offer access to wild, non-human nature for the campus community.
- 6) Infrastructure elements in the Lakeshore Nature Preserve should:



- a. Be designed to protect the natural and cultural resources of the Preserve.
  - b. Be designed to protect the safety of users.
  - c. Minimize adverse physical, biological, and aesthetic impacts.
  - d. Serve multiple uses whenever possible.
  - e. Support the biological diversity that is fundamental to the educational value of the Preserve.
  - f. Be sustainable and environmentally friendly.
- 7) Management techniques should as much as possible mimic natural processes. Artificial structures should be kept to a minimum, blending in space, form, and color with the natural setting. Disturbance and compaction of the soil should be minimized to discourage invasive vegetation and erosion.
- 8) Trails should provide appropriate access while minimizing fragmentation of biological communities.
- 9) Motorized traffic, noisy machinery, and oversized equipment should be kept to a minimum. Infrastructure should be designed to minimize required maintenance in accordance with the previous guiding principles.
- 10) In determining the ecological community appropriate to a site, the existing vegetation as well as historical and pre-European data should be considered. Major changes in community physiognomy (e.g., forest to grassland) will be undertaken only after careful consideration and stakeholder input.
- 11) Planning recommendations should only be implemented after careful study and on-site evaluation; all design and management should be adaptive, evolving in an iterative way to accommodate new knowledge and data.



Left to right: Trailhead signs direct visitors to the Preserve; an American lotus blooms in University Bay; and student volunteers prepare to mulch a trail.



Left to right: Cattail heads stand out against the winter sky; Ecology students learn to identify trees in winter; and a yellow swallowtail butterfly visits a blue flag iris.

## Strategic Plan Summary Table

For each strategic priority, specific strategies for accomplishing those priorities have been identified.

Priorities	Strategies
1. Consolidate and clarify the mission and create a vision for the Preserve.	<ul style="list-style-type: none"> <li>a. Refine the mission statement and create a vision</li> <li>b. Create a tagline to support the mission statement</li> <li>c. Identify priorities and measurable goals for each concept or category of the mission</li> <li>d. Increase awareness of the mission</li> </ul>
2. Develop and implement a Communication Plan.	<ul style="list-style-type: none"> <li>a. Determine process for Communication Plan development</li> <li>b. Develop and implement the Communication Plan</li> <li>c. Evaluate effectiveness of the Communication Plan</li> <li>d. Establish a process for updating the Communication Plan</li> </ul>
3. Grow resources to support mission.	<ul style="list-style-type: none"> <li>a. Identify needs and resources</li> <li>b. Develop and implement a plan to increase overall funding</li> <li>c. Build capacity in support of mission through volunteer and partner engagement</li> </ul>
4. Build strategic partnerships.	<ul style="list-style-type: none"> <li>a. Identify strategic partnerships</li> <li>b. Establish a guiding framework for working with all partners</li> <li>c. Develop and implement a plan to engage partners in mission areas</li> <li>d. Identify measures for assessing partnership effectiveness</li> </ul>
5. Continue process improvement initiatives.	<ul style="list-style-type: none"> <li>a. Establish a baseline of Preserve operational activity</li> <li>b. Ensure all activities align with the mission</li> <li>c. Plan for a future state of Preserve operations</li> <li>d. Transfer findings to strategic priorities addressing communication plan, growing resources &amp; volunteer capacity, partnerships, and facilities master plan development</li> </ul>
6. Update the 2006 Lakeshore Nature Preserve Master Plan.	<ul style="list-style-type: none"> <li>a. Facilitate the Master Plan Process</li> <li>b. Measure progress toward achieving Master Plan proposals</li> </ul>



Left to right: The Hoofer Outing Club enjoys a fire on Picnic Point; green metallic sweat bees visit coreopsis flowers; a baby great horned owl perches in a tree in Willow Creek Woods.

## Strategic Priority #1

### Consolidate and clarify the mission and create a vision for the Preserve.

An organization's vision is an aspirational long-term view of where the organization is headed. A mission focuses the organization and its stakeholders around its reason for being. Together these statements guide the actions of the organization and its stakeholders, keeping it on track into the future.

A collaborative effort with the Preserve Committee and stakeholders has brought about a revised mission and created a vision for the Lakeshore Nature Preserve. This process was initiated early in the strategic planning process so it could inform the priorities set during the process

The focus group meeting theme addressed by this priority is related to defining & systematically communicating the Preserve's identity, mission, and purpose.

The SWOT analysis identified the following weaknesses which are addressed by this strategic priority:

- Strengths – Unique cultural history; Connection to university; Diverse ecosystems; Powerful teaching tool and research asset
- Weaknesses - Mission statement is long and not easily used or memorable; Preserve does not have a vision statement.
- Opportunities – Recent increase in the acknowledgement of natural areas as places of well-being for people; Places are needed for long-term research in climate change, ecosystems, restoration

### Key Performance Indicators

- The mission statement is refined.
- The mission & vision are incorporated into the communication plan.
- A tagline is created & implemented.
- Current mission-based performance metrics are reviewed, and new metrics are defined to measure performance toward goals.
- Stakeholder surveys indicate increased awareness of mission and vision of the Preserve.

### Action Plan

Action Item	Target Date	Team Leads
<b>Refine the mission statement and create a vision</b>		
1. Conduct a visioning session with staff and the Preserve Committee	Completed 9-23-2019	Gary Brown
2. Review, refine and finalize mission statement and vision	Completed 11-12-2019	Gary Brown
<b>Create a tagline to support the mission statement</b>		
1. Draft, refine and finalize tagline	July - November 2020	Laura Wyatt Bryn Scriver Adam Gundlach
2. Publicize tagline; (incorporate into communication plan with print and online identity)	January 2021	Laura Wyatt Bryn Scriver
<b>Identify priorities and measurable goals for each concept or category of the mission</b>		
1. Identify metric categories, potential metrics, and data sources, and draft short, intermediate and longer-term metrics	January-March 2021	Laura Wyatt
2. Track baseline, set targets & communicate	August 2021	Laura Wyatt
<b>Increase awareness of the mission</b>		
1. Incorporate into the communication plan	December 2020 - May 2021	Laura Wyatt Bryn Scriver
2. Measure results (survey)	December 2021???	Laura Wyatt Bryn Scriver



## Strategic Priority #2

### Develop and implement a communication plan.

A key to the Preserve meeting its mission and supporting the university in research, teaching and outreach is having the university community be aware of and involved in the Preserve and the opportunities it provides. A good communication plan aims to unify an organization's effort to clearly and effectively share its messages through the various sources available. The Preserve has many messages, audiences and methods of delivery that require a coordinated and documented plan for effective use. The plan needs to be reviewed on a regular basis with the Preserve Committee and stakeholders to assure it is current and meeting the needs of the university and the Preserve mission statements.

The focus group meeting themes all relate to the on-going need for a strong communication and branding/identity plan.

The SWOT analysis also identified the following opportunities and weakness addressed by this strategic priority:

- Strengths – Connection to university
- Weaknesses - Brand recognition is poor; Lack of signage – educational, informative; Not using full potential of technology, *e.g.*, apps, virtual field trip
- Opportunities - Many university academic departments could benefit from teaching outdoors; Recent increase in the acknowledgement of natural areas as a place of well-being for people; Preserve is an attractive cause for fundraising

### Key Performance Indicators

- Branding and identity become strong enough that references to Campus Natural Areas are gone and location references to areas within the Preserve refer to as part of the "Lakeshore Nature Preserve".
- Social media metrics increase.
- Stakeholder surveys indicate increased awareness of the Preserve and its programs.

### Action Plan

Action Item	Target Date	Team Leads
<b>Determine process for Communication Plan development</b>		
1. Coordinate with FP&M communications staff	July-August 2020	Laura Wyatt Bryn Scriver
<b>Develop and implement the Communication Plan</b>		
1. Base plan on desired messages and targeted audiences	December 2020 - May 2021	Laura Wyatt Bryn Scriver Adam Gundlach
2. Utilize baseline evaluation from Strategic Priority #5- initiatives will inform this plan	December 2020 - May 2021	Laura Wyatt Bryn Scriver Adam Gundlach
<b>Evaluate effectiveness of Communication Plan</b>		
1. Utilizing the Preserve Committee and stakeholder input, determine best metrics based on the objectives	April-May 2021	Laura Wyatt Bryn Scriver
<b>Establish a process for updating the Communication Plan</b>		
1. Review annually with the Preserve Committee and stakeholders; monitor and adjust communication plan as necessary based on that regular feedback.	June 2022	Laura Wyatt Bryn Scriver
2. Revise when objectives have been met and/or new objectives are identified	As needed	Laura Wyatt Bryn Scriver

### Strategic Priority #3

#### Grow resources to support mission.

Increased resources, both financial and volunteer, are needed to support the vision and achieve the educational mission of the Preserve. Reliance on both university funding and gift funding requires strategic planning to support current activities and future growth.

The Preserve has a robust volunteer program with significant student participation. Increasing opportunities boost land care management, provide applied learning experiences, and support student development of environmental ethics as world citizens who recognize the value of natural areas and how important they are in keeping natural areas healthy and functional. The Preserve has a modest but reliable donor base and staff are considered good stewards of resources; to quote one stakeholder, “they do so much with so little”. The Preserve’s positive relationships with the Wisconsin Foundation and the Alumni Association (WFAA) are advantageous as they together meet the challenge of raising funds.

The focus group meeting themes addressed in this strategic priority include:

Theme #2 – Responsive staff and passionate volunteers uphold and carry out the Preserve mission.

Theme #4 – The Lakeshore Nature Preserve requires additional resources to succeed in its mission.

The SWOT analysis also identified this need and related opportunities:

- Weaknesses – Campus-wide storage locations result in inefficient operation; Restroom facilities are minimal
- Opportunities – Preserve is an attractive cause for fundraising; Recent increase in acknowledgement of natural areas as a place of well-being for people
- Threats – Lack of resources lead to understaffing and underfunding; Scarce-resources mentality limits big thinking; More areas to manage without additional resources, including stormwater basins, upcoming Observatory Hill, Willow Creek, etc.

#### Key Performance Indicators

- Fund Development Plan is completed and establishes annual goals; the plan is shared with the Preserve Committee.
- Number of gifts and/or grants increases.
- Value of funds raised increases.
- Goals are set, measured and evaluated for volunteer program.

#### Action Plan

Action Item	Target Date	Team Leads
<b>Identify needs and resources</b>		
1. Review “plan for a future state” and needed resources to support plan as developed during Strategic Priority #5	December 2020	Laura Wyatt Gary Brown Adam Gundlach
2. Determine and prioritize resources to cover identified gaps	December 2020 - February 2021	Laura Wyatt Gary Brown
<b>Develop and implement a plan to increase overall funding</b>		
1. Develop a plan to increase overall funding; work with WFAA	March-August 2021	Laura Wyatt Gary Brown
2. Implement plan	September 2021 into future	Laura Wyatt Gary Brown
<b>Build capacity in support of mission through volunteer and partner engagement</b>		
1. Create and implement engagement plans for different categories of volunteers and partners. Integrate into communication plan (strategy #2) and build strategic partnerships (strategy #4)	March – August 2021	Laura Wyatt Bryn Scriver

## Strategic Priority #4

### Build strategic partnerships.

Strong, synergetic partnerships are key to enabling the Preserve to achieve its educational mission while protecting the Preserve's natural setting.

Staff roles have changed over the years and there is a need to redefine the nature of partnerships so that support is aligned with priorities. Defining the roles and responsibilities of Preserve staff and partners and establishing guidelines regarding use, communication, fundraising, and representation will aid the Preserve in long-term success. Developing a shared understanding of expectations, and as appropriate, formalizing agreements, will ensure the best possible outcomes.

The focus group meeting themes addressed in this strategic priority are:

Theme #2 – Responsive staff and passionate volunteers uphold and carry out the Preserve's mission.

Theme #5 – The Lakeshore Nature Preserve, and its current/potential partners, have opportunities to build upon the common interests in protecting and ensuring the sustainability of the Preserve.

The SWOT analysis identified many relevant assets, needs and opportunities:

- Strengths – Unique cultural history; Connection to university; Passion & commitment by knowledgeable Preserve staff & volunteers; Health, wellbeing asset to campus community; Powerful teaching tool and research asset
- Weaknesses – Confusion over the role of Friends of the Preserve and Lakeshore Nature Preserve staff responsibilities
- Opportunities – Many possible strategic partnerships: Outdoor UW, Friends, Eagle Heights Community, Ho-Chunk Nation, SOAR, Housing, Recreation & Wellbeing, etc.; Location; proximity to campus, city, lake; Many university academic departments could benefit from teaching outdoors; Recent increase in acknowledgement of natural areas as a place of well-being for people; Places are needed for long-term research in climate change, systems, restoration, etc.
- Threats - Lack of resources - understaffed and underfunded.

### Key Performance Indicators

- Permit process is recognized by Preserve users and number of approved permits increases.
- MOU is created outlining roles and responsibilities with partners.
- Engagement by UW community, at all levels, is cultivated and increases.

### Action Plan

Action Item	Target Date	Team Leads
<b>Identify strategic partnerships</b>		
1. Identify criteria for partnerships (aligned with mission & needs)	August – October 2020	Laura Wyatt Bryn Scriver
2. Develop a partner/mission matrix	August – October 2020	Laura Wyatt Bryn Scriver Adam Gundlach
<b>Establish a guiding framework for working with all partners</b>		
1. Establish guidelines for partnerships	August – October 2020	Laura Wyatt Bryn Scriver
2. Formalize partnerships where appropriate (MOUs)	October - December 2020	Laura Wyatt Bryn Scriver
<b>Develop and implement a plan to engage partners in mission areas</b>		
1. Create and implement engagement plan	March – May 2021	Laura Wyatt Bryn Scriver
<b>Identify measures for assessing partnership effectiveness</b>		
1. Establish and track performance indicators	After 2021	Laura Wyatt Bryn Scriver



## Strategic Priority #5

### Continue process improvement initiatives.

Oversight responsibility of the Preserve has shifted from the UW Arboretum, to the UW FP&M Physical Plant, and finally to Campus Planning and Landscape Architecture for the last 10 years. This evolution has resulted in operational improvements but has made it challenging to institutionalize management processes and procedures and has led to some organizational inefficiencies.

Regular review, analysis, and documentation of Preserve operating procedures will support revisions for focus and efficiency. Improved records, process, and prioritization are all needed to identify staff and resources needed to support growth. Preserve governance processes that provide advice to FP&M and Preserve staff will also be reviewed to improve decision-making processes, especially as they relate to education and research initiatives.

This strategic priority is supported by all of the focus group meeting themes.

The SWOT analysis identified needs for process improvement and an opportunity to mitigate threats through increased efficiency of operations:

- Weaknesses – Confusion over role of Friends vs the Preserve staff; Master Plan is 14 years old and needs updating; Distributed storage locations cause inefficient operations
- Opportunities - Preserve staff has the knowledge to move to larger-scale management activities
- Threats – Lack of resources – understaffed and underfunded; More areas to manage without additional resources

### Key Performance Indicators

- Operational procedures are written and reviewed by Preserve staff.
- Needs assessment of operational processes and procedures is done.
- A process map that recommends the future state of the organizational framework including structure (i.e. staffing) and processes is created and shared with Preserve Committee for input and advice.

### Action Plan

Action Item	Target Date	Team Leads
<b>Establish a baseline of Preserve activity</b>		
1. Document current processes and procedures, including: <ul style="list-style-type: none"> <li>a. Administrative (budgeting, work planning, staffing, safety, data organization, etc.)</li> <li>b. Program (permits, volunteers, outreach, etc.)</li> <li>c. Land Management (onboarding, equipment &amp; storage facilities, invasive species, work logs, record keeping, service agreement with Grounds, etc.)</li> </ul>	January – March and July – November 2020	Laura Wyatt Adam Gundlach Bryn Scriver
<b>Ensure all activities align with the mission</b>		
1. Conduct a needs assessment for areas reviewed above in #1	September - October 2020	“
<b>Plan for a future state</b>		
1. Prioritize identified needs within each Preserve activity outlined above and as a whole	November – December 2020	“
2. Create plan for future state of Preserve operations	November – December 2020	“
3. Identify needed resources to support plan	November – December 2020	“
<b>Transfer findings to strategic priorities addressing communication plan, growing resources &amp; volunteer capacity, partnerships, and master plan development.</b>		

## Strategic Priority #6

### Update the 2006 Lakeshore Nature Preserve Master Plan.

The master plan update will inventory and analyze the current condition of the Preserve's facilities and cultural and environmental resources. The master plan process takes a holistic approach of evaluating the program needs, support for the Preserve's mission, and resource and facility conditions coupled with the user experience and safety so that optimal user experience can be balanced with the capacity of the land in the Preserve. Information collected in the strategic planning process will inform the update of the 2006 Lakeshore Nature Preserve Master Plan.

Focus group meeting participants noted that it is time to update the 2006 Preserve Master Plan. Master plan revision is supported by:

Theme #1 - The Lakeshore Nature Preserve has several unique strengths.

Theme #5 – The Lakeshore Nature Preserve, and its current/potential partners, have opportunities to build upon their common interests in protecting and ensuring the sustainability of the Preserve.

The SWOT analysis clearly identified the need for the Master Plan update:

- Strengths – Diverse habitats, ecosystems, species (birds, plants); Helps with preservation of watershed
- Weaknesses - Master Plan is 14 years old and needs updating; Restroom facilities are minimal; Lack of signage – educational, informative; Lack of specific management plans for all areas
- Opportunities - Preserve staff has the knowledge to move to larger-scale management activities; Places are needed for long-term research in climate change, systems, restoration
- Threats - Climate change, erosion issues, invasive species; Potential use of the area for building development; Parking is difficult/not enough; Incompatible uses in the Preserve: Lot 34, snow pile, Grounds storage

### Key Performance Indicators

- Goals are set and funding secured for Master Plan consultant.
- Master Plan consultant hired.
- Updated Master Plan is adopted by the Preserve Committee & approved by FP&M Leadership.
- Track progress toward completing the improvements recommended in the updated Master Plan.

### Action Plan

Action Item	Target Date	Team Leads
<b>Facilitate the Master Plan Process</b>		
1. Determine scope and proposed goals of Master Plan	June - August 2020	Rhonda James Laura Wyatt
2. Secure funding for Master Plan	August 2020	Laura Wyatt Gary Brown
3. Hire master plan consultant	September- November 2020	Rhonda James Laura Wyatt
4. Set schedule: include staff, Preserve Committee, stakeholder input sessions and leadership updates	November 2020	Rhonda James Laura Wyatt
5. Coordinate communication of master plan process with the direction of the communication plan	throughout process	Rhonda James Laura Wyatt
6. Complete Lakeshore Nature Preserve Master Plan	December 2021	Rhonda James Laura Wyatt
<b>Measure progress of achieving Master Plan proposals</b>		
1. Perform an annual review of Master Plan	December 2022	Rhonda James Laura Wyatt
2. Report findings to Preserve Committee, stakeholders, and FP&M and Campus Leadership	December 2022	Rhonda James Laura Wyatt

## Summary and Next Steps for Implementation

The strategic planning process, with considerable input from stakeholders during focus groups and the online survey, has led to the strategic priorities solidified by staff at their retreat. Clarification of the mission and vision through discussions of the Preserve Committee has focused attention on what the Preserve is and where it is headed.

Continuation of internal process definition and documentation will provide information needed for the recommended communication plan as well as the update to the facilities master plan. With the direction of the Preserve defined, current partnerships will be strengthened, and new partnerships will form. This will provide the basis for growing resources and leveraging volunteer capacity.

The next steps towards implementation will be to dig deep into the process improvement initiatives. A critical look inward will organize operational activities around the refined mission and vision of the Preserve and help to identify where additional resources are needed for best serving the university community and UW-Madison's mission of research, teaching and outreach. This effort will also inform the Communications Plan as well as the update to the Lakeshore Nature Preserve Master Plan.

### Specific Steps toward Implementation

1. Continue Process Improvement initiatives
2. Discuss & confirm Core Values of the Lakeshore Nature Preserve with the Preserve Committee
3. Define scope of Preserve Master Plan Update process
4. Determine outline of Communication Plan and begin work with FP&M Communications staff
5. Hire consultants to assist with the Master Plan & add staff time to the work plan efforts
6. Add Communication Plan to the Preserve Staff's work plan efforts

### Review and approval process

Strategic Plan Presentation Shared with Preserve Comm.	October 2019
FP&M Executive Leadership Update	November 2019
Public Info. Meeting on Strategic Plan Draft, evening	November 12, 2019
Public Info. Meeting on Strategic Plan Draft, day	November 20, 2019
FP&M Executive Leadership Review	February 2020
Draft presented to Preserve Committee	March 2020
Final document reviews	April 2020
Final documents uploaded to Preserve website	September 2020
Action begins on recommendations	Fall 2020



## Appendix A – Strategic Planning Focus Group Questions

### Lakeshore Nature Preserve Strategic Planning Focus Group Questions

1. Considering other similar organizations, what are the Preserve's unique characteristics or strengths?
2. What do you feel is working well with the Lakeshore Nature Preserve?
3. In what areas do you feel the Lakeshore Nature Preserve could improve? Are there any gaps in our current contributions?
4. On what issues should the Preserve focus its work over the next ...?
  - 2-5 years
  - 5-10 years
5. What should the Lakeshore Nature Preserve aspire to do or be?
6. The desired impact of an organization is what the organization could ultimately achieve if it was successful in its work (mission) and fulfilled its aspirational future (vision.) It is the organization's "end goal."
  - What impact should the Lakeshore Nature Preserve seek to achieve?
7. Development pressures in and around the Preserve continue on a regular basis. How do we continue to communicate and document the value of the Preserve for university decision-makers?
8. Do you have any comments or observations you would like to share about the Preserve, our role, or our programs?

## Appendix B – Focus Group Themes

### Themes from the UW-Madison Lakeshore Nature Preserve Strategic Planning Focus Groups June 6, 2019

**Theme #1 - The Lakeshore Nature Preserve has several unique strengths** which are illustrated through its proximate location and connection to UW-Madison's main campus as a research laboratory, educational asset, and campus natural area with four-plus miles of Lake Mendotashoreline.

- The easily-accessed lake and natural classroom/laboratory is noted for its diversity – in ecosystems and habitats, in faculty disciplines represented through research and teaching happening on site, and in the variety of cultures represented and languages spoken by residents enjoying the Eagle Heights gardens.
- The Preserve flourishes as an intrinsic part of the university campus, both currently where faculty, staff, students and the community intersect with nature for education and recreation; and retrospectively where alumni hold treasured memories of iconic Madison and campus views, landscapes, and life events.

**Theme #2 - Responsive Lakeshore Nature Preserve staff and passionate volunteers uphold and deploy the mission of the Preserve**, through the regular and consistent use of the Preserve for teaching and research, by managing the Preserve for accessibility and multiple uses, and through regular communication and outreach within the university and many varied external partners.

- Preserve staff provide great attention to budget management, work planning and the research & teaching permit processes. They also are working on expansion of seasonal staff and growth in the number of volunteers who help to facilitate land management needs, improvements to trails, and invasive species control.
- Preserve staff also work with the university's shared governance Preserve Committee to develop policies and broad decision-making on land management goals.
- On-going efforts in land management have resulted in positive impacts on the land. For example, hundreds of dedicated volunteers have annually provided thousands of hours supporting land management activities in the field resulting in a reduction of invasive species in the Preserve while gaining hands-on experience in land management. Effective land management of multi-use areas requires concurrent attention and thoughtfulness about plants, animals, water, history, cultural heritage and the people using the Preserve each day.

**Theme #3 - The Lakeshore Nature Preserve needs to define and systematically communicate its identity, mission and purpose** to achieve greater brand recognition, highlight its value and importance to the university and the greater campus community, and increase faculty/staff and students' awareness of the Preserve that supports continued growth in stakeholder and alumni support.

- As future resources allow, strengthen the educational mission through increased awareness and expanded use by faculty, staff, and students. Furthering academic integration and documentation of students' learning in this outdoor classroom through defined assessment protocols would help demonstrate the overall value of the Preserve which could be accomplished through a partnership with academic staff on campus.

- An interpretive or visitor center that promotes the Preserve's service function and invites campus and the public in to learn would contribute to its sense of place. In addition to providing appropriate restroom facilities, historical, cultural heritage, natural information and wayfinding, such a center could eventually house displays for the public to access, learn and apply learning about ecological restoration.
- Expanded outreach and publicity to increase awareness and further define the Preserve for campus and the public may be a first step. Information needs to be improved and expanded at existing campus events, such as faculty/staff orientation and Student Orientation and Registration (SOAR), or through expanded newsletter circulation or informative, educational signage that does not present a visual barrier to the natural landscapes or cultural heritage.

These are all good examples of activities to consider in an overall expanded communication and outreach effort for the Preserve.

**Theme #4 – The Lakeshore Nature Preserve and its current/potential partners have opportunities to build upon their common interests in protecting and ensuring the sustainability of the Preserve.** Public-private partnerships can be instrumental to success, with attention to the interests, visions and regulatory requirements of each organization. The Preserve and the Friends of the Preserve educate, connect with, and recruit people to support the Preserve, as volunteers, donors and advocates. The two organizations need to pursue their complementary missions in a cohesive, unified direction.

- Communication is key to successful collaboration. Through strategic planning and upcoming facility master planning efforts, there are opportunities for Preserve staff to share the long-term vision, regulatory context and desired impact of the Preserve. Collaborative discussion regarding the role partners might play in helping to achieve the Preserve's vision and the specific responsibilities each organization can assume may help align energies and commitment. It is important that partner groups are partners and work as allies.
- It is also important that stakeholders understand the nature of the collaboration between the Preserve and the Friends of the Preserve, and to whom they should reach out for volunteering, donating or even complaining. This is difficult to ascertain with separate websites, different donor portals and different overall priorities. Competition between the two organizations does not fully leverage the limited resources to support and sustain the Preserve. Future discussion on where the groups may come together and where they must remain autonomous, and communication and transparency about these areas for the public, seem critical.
- Opportunities for strategic collaboration exist among other stakeholder groups that focus on environmental learning on and off campus and should be promoted.

## Summary

**In the short term, stakeholders recommend a focus on planning and building systems that can be expanded and refined; results can then be measured to assess the impact of the Preserve over time.**

Focus areas include facilities master planning, operational planning (including strategic planning and personnel planning), branding, funding/fund raising, student usage, invasive species management, ecological restoration and land management, and strategic partnerships development.

- A short-term focus on branding and delineating the identity of the Preserve leads the plan so that campus and community members come to know its value and importance. This, in turn, would facilitate increased undergraduate student use and greater diversity of users, including use by graduate students and their families. Measurement of student and community use may assist in staff and resource planning, as well as the assessment of the value and impact of the Preserve in the longer term.



- While current and short-term fund raising are intended to cover base operations, preparation of compelling case statements for prioritized capital projects, on-going land management, and endowment planning is needed to attract major donors for long-term support. Establishment of a visitor or interpretive center for the Preserve that is appropriately resourced may be part of that case statement. In addition to fund raising, marketing of the Preserve to the next generation through the Preserve website and social media looks toward future alumni support.
- Longer-term ecological restoration and land management initiatives move from invasive species management to larger-scale land management, communication, and education.  
This includes care of native species and existing woodlands and minimization of “edge effects” due to the proximity to urban and campus life. The long-term view requires attention to trail use, overuse, impact of use, and pressure on entry points and the shoreline. Longer-term research projects may contribute to successful restoration and management, and attention to increasing staff capacity and providing needed equipment and infrastructure is also key.

**The Preserve should *aspire to be* an integral part of the university, providing a unique location for education, research, respite and resources for well-being right on campus.** Varied stakeholders envisioned the Preserve as a natural outdoor laboratory that invites students and community members to understand and engage in land management and ecological restoration or to participate in hands-on learning through many disciplines in a natural setting. The iconic setting could be a source of meaningful memories for every student, staff and faculty member that then helps to drive on-going donor support for decades to come.

- The Preserve was described as a “jewel” or “gem,” in an urban environment that sets the UW campus apart from others. It was also labeled as a “model” or “exemplar” for sustainable ecological restoration within the dynamic tension between the city, campus and the lake.
- Recognition as the university’s largest outdoor classroom on campus that provides experiential environmental learning for students and evokes the Wisconsin Idea for visitors and Friends is also an essential part of the vision for the Preserve.
- The Preserve provides the university and its community with significant ecological services including:
  - carbon sequestration
  - stormwater management
  - improved air quality
  - reduction in heat island effects
  - a place that supports physical and psychological wellness
  - increased biodiversity
  - increased pollinator habitat
  - improved lake water quality
  - a recognized important bird habitat
  - decreased fragmentation of habitat, reduced edge effect
  - support for increased diversity
  - increased social interactions in a neutral setting
  - increased food security with community gardens.

**The Preserve’s desired impact involves changes in thinking, attitudes and behaviors that move an individual, group, campus or a generation toward healthy, sustainable living and a greater respect for the environment.** The impact may start with short-term actions that over time lead to longer-term positive effects. These may be learned through a hands-on outdoor classroom learning experience, through participating in or consuming research, or through ongoing interaction with the Preserve as a source of wellness or nourishment. The increased knowledge leads to incremental changes in individuals’ behavior and

an appreciation for preservation and land management that over time may have an additive ecological impact.

- Implicit in the discussion of impact is the necessity to measure results over time. This may begin with simple usage data, but eventually may extend to behavior metrics that measure change in attitude and behavior over time.
- Desired impact and measurable results should also align with the University of Wisconsin-Madison's Mission and Strategic Framework.

## Appendix C – On-line Survey

### Lakeshore Nature Preserve Online Survey Questions

Q1 - As part of the Lakeshore Nature Preserve planning effort, we would like to know more about the campus community and visitor experience. The Preserve Planning Team invites you to take approximately 15-20 minutes to complete this survey. You may start the survey, leave and come back to complete and submit your responses if you are doing so from the same computer and ITP location. Completed surveys are due by 5:00 p.m., Monday, May 6, 2019. Completion of the survey implies your consent to participate. You may discontinue the survey at any time without penalty; however, your ideas and insights are valuable to the Preserve staff. Responses are confidential and will be collected by a representative from UW-Madison Office of Strategic Consulting. Questions regarding the survey may be directed to Lori Scroggs, Consultant at (608) 265-3057. Thank you, in advance, for your information, ideas and insights.

Q2 - What is your age?

- ☐ 18 to 30
- ☐ 31 to 40
- ☐ 41 to 50
- ☐ 51 to 65
- ☐ 66 to 75
- ☐ 76+

Q3 - What is your race/ethnicity?

- ☐ African
- ☐ American Indian or Alaska Native
- ☐ Asian
- ☐ Black or African American
- ☐ Latino/Hispanic
- ☐ Middle Eastern
- ☐ Native Hawaiian or Pacific Islander
- ☐ White
- ☐ Other

Q4 - What is your gender?

- ☐ Male
- ☐ Female
- ☐ Other

Q5 - What is your zip code?

Q6 - What is your primary affiliation with the University of Wisconsin-Madison?

- ☐ Student (undergrad/grad)
- ☐ Faculty
- ☐ Faculty Emeritus
- ☐ Staff
- ☐ Alumni
- ☐ Community Member
- ☐ Friends of the Lakeshore Nature Preserve
- ☐ Prefer not to respond
- ☐ Other

Q7 - Frequency/Usage Questions: On average, how often do you visit the Lakeshore Nature Preserve?

- ☐ Never

- Not in last two years
- 1-5 times/year
- 6-10 times/year
- More than 10 times/year

Q8 - What areas of the Lakeshore Nature Preserve do you primarily visit? [Check all that apply.]

- Eagle Heights Woods
- Raymer's Cove (Wally Bauman Woods/Tent Colony Woods)
- Frautschi Point
- Eagle Heights Gardens
- Biocore Prairie
- Bill's Woods
- Picnic Point
- Class of 1918 Marsh
- Willow Creek
- Howard M. Temin Lakeshore Path
- Muir Woods
- Observatory Hill
- I don't know
- Other

Q9 - Tell us about your activities when visiting the Preserve in the last two years. [Check all that apply.]

- Enjoyed Birding
- Volunteered
- Enjoyed nature, took a break
- Enjoyed a fire circle
- Came to a social outing with friends or family
- Attended free public walks, family programs, tours
- Used trails (to hike, run)
- Participated in citizen science project
- Attended a UW class
- Worked on a UW class project
- Conducted UW research
- Attended program organized by an outside group
- Came for work-related activity
- Took nature photography
- Visited Eagle Heights gardens
- Other
- Have not visited in the last two years

Q10 - Satisfaction Questions: Please rate your level of satisfaction with our visitor amenities using the scale below. [Extremely dissatisfied, somewhat dissatisfied, neither satisfied or dissatisfied, somewhat satisfied, extremely satisfied]

- Parking
- Visitor Kiosks & Trailhead
- Signs
- Trail System
- Trail Navigation
- Interpretive Signs
- Public Restrooms
- Fire Circles

Q11 - Please rate your level of satisfaction with our public outreach programs. [Extremely dissatisfied, somewhat dissatisfied, neither satisfied or dissatisfied, somewhat satisfied, extremely satisfied]



- Information in Kiosks
- E-newsletter
- Volunteer Program
- Preserve Website
- Social Media Accounts
- Academic Class Support
- Research Permit Process

Q12 - Briefly, please share your suggestions how we could improve the visitor experience.

Q13 - Lakeshore Nature Preserve Mission & Purpose: *The University of Wisconsin-Madison Lakeshore Nature Preserve permanently protects the undeveloped lands along the shore of Lake Mendota where members of the campus community have long experienced the intellectual and aesthetic benefits of interacting with the natural world. The Preserve shelters biologically significant plant and animal communities for teaching, research, outreach, and environmentally sensitive use, and safeguards beloved cultural landscapes. The Preserve is as essential to the university as its lecture halls, laboratories, and playing fields. It contributes to a powerful sense of place and fosters an ethic of stewardship to promote mutually beneficial relationships between humans and the rest of nature.*

How familiar would you say you are with the mission of the Lakeshore Nature Preserve?

- Extremely familiar
- Very familiar
- Moderately familiar
- Slightly familiar
- Not familiar at all

Q14 - Please rate the clarity of mission of the Lakeshore Nature Preserve, reflecting specifically upon how easy or difficult it is to understand.

- The mission is very easy to understand.
- The mission is somewhat easy to understand.
- The mission is neither easy nor difficult to understand.
- The mission is somewhat difficult to understand.
- The mission is very difficult to understand.

Q15 - Please indicate your degree of confidence that the Lakeshore Nature Preserve is meeting its mission.

- I have full confidence that the Lakeshore Nature Preserve is meeting its mission.
- I have some confidence that the Lakeshore Nature Preserve is meeting its mission.
- I neither have nor lack confidence regarding the Lakeshore Nature Preserve meeting its mission.
- I lack confidence that the Lakeshore Nature Preserve is meeting its mission.
- I do not believe that the Lakeshore Nature Preserve is meeting its mission.

Q16 - What suggestions do you have to help the Preserve advance its mission?

Q17 - Lakeshore Nature Preserve Guiding Principles: Those responsible for managing and caring for the Lakeshore Nature Preserve continue to develop and refine policies and guidelines for the stewardship of the Preserve that protect and interpret the biological and cultural resources of the landscape in support of the UW-Madison mission. Please indicate the extent to which the three primary stewardship goals have been addressed. Please indicate the extent to which the three primary stewardship goals have been addressed. [Extremely well, very well, moderately well, slightly well, not well at all]

- Preserving, restoring, and interpreting natural plant and animal communities in support of the UW-Madison education, research and outreach missions.
- Protecting signature landscapes and views that are vital to defining the university campus and the city of Madison.
- Establishing management priorities that maximize educational benefits, while minimizing the impacts of educational use.

Q18 - Please indicate the extent to which the planning and management objectives for the Lakeshore Nature Preserve have been addressed. [Extremely well, very well, moderately well, slightly well, not well at all]

- ☐ Preservation and restoration of ecological communities
- ☐ Creation of contiguous natural landscapes
- ☐ Attention to biodiversity
- ☐ Control of invasive species
- ☐ Monitoring and record keeping
- ☐ Safety and maintenance of trails
- ☐ Maintenance of Fire Circles
- ☐ Facilitating academic and research uses
- ☐ Litter and trash collection and removal
- ☐ Stakeholder engagement

Q19 - Communication and Future Priorities How do you generally get information about the Preserve?

- ☐ Preserve e-Newsletter
- ☐ Social Media
- ☐ Preserve Website
- ☐ Friends of the Preserve Newsletter
- ☐ UW-Madison Website or Other UW Communications
- ☐ News Media
- ☐ Kiosk Bulletin Board
- ☐ Word of Mouth
- ☐ Other

Q20 - What do you believe are the biggest challenges to the Preserve's restoration, preservation and educational work? [Select up to three responses]

- ☐ Invasive Species
- ☐ Climate Change
- ☐ Stormwater
- ☐ Urbanization and Development
- ☐ Lack of Adequate Resources
- ☐ Visitor Impact
- ☐ I don't know
- ☐ Other

Q21 - What do you believe makes the Preserve valuable to students, to the university and to surrounding communities? [Check all that apply.]

- ☐ Protects cultural resources and biological communities
- ☐ Provides a place for environmentally friendly recreation
- ☐ Provides a place for teaching and research
- ☐ Provides a place for respite and relaxation
- ☐ Protects the shoreline
- ☐ Provides a flat transportation corridor for pedestrians and bicyclists
- ☐ Fosters the stewardship ethic
- ☐ Creates a sense of place for the UW-Madison campus

Q22 - What do you personally value most about the Preserve?

Q23 - Where should the Preserve focus its work in the next 5-10 years?

Q24 - Do you have any other feedback you would like to share to inform the Lakeshore Nature Preserve Strategic Planning effort?

## Appendix D – List of Focus Group Attendees

### UW-Madison Lakeshore Nature Preserve Strategic Plan Focus Group Attendees – FINAL LIST (updated July 18, 2019; 1:00pm)

	Lakeshore Nature Preserve Staff	Tuesday, April 2, 2019; 1:30-3:00 PM 30 N Mills
1	Gary Brown	Preserve staff - Director
2	Adam Gundlach	Preserve staff – Field Projects Coordinator
3	Rhonda James	CPLA staff – Senior Landscape Architect
4	Bryn Sriver	Preserve staff – Volunteer & Outreach Coordinator
5	Laura Wyatt	Preserve staff – Program Manager

	Lakeshore Nature Preserve Committee	Thursday, April 18, 2019; 9:00-10:30 AM Union South TITU
1	Andrew Busker	Preserve Committee member, ASM
2	Morgan Grunow	Preserve Committee member, ASM
3	Jacqueline Beaulieu	Preserve Committee member, ASM
4	Sara Hotchkiss	Preserve Committee member, faculty/Botany
5	Glen Stanosz	Preserve Committee member, faculty/Forest & Wildlife Ecology
6	Alan Turnquist	Preserve Committee member, academic staff
7	Joe Webb	Preserve Committee member, academic staff/Outdoor UW
8	Karen Oberhauser	UW Arboretum
	Gary Brown	Observer, UW FP&M, Preserve director
	Laura Wyatt	Observer, UW FP&M, Preserve program manager
	Rhonda James	Observer, UW FP&M, Landscape Architect, Sr.
	Gisela Kutzbach	Observer, Guest, Friends of the Lakeshore Nature Preserve
	Roma Lenehan	Observer, Guest, Preserve volunteer

	Stakeholder Meeting #1	Wednesday, April 24, 2019; 6:30 to 8:00 PM Union South TITU
1	Ann Burgess	UW Emeritus, Biocore
2	Richard ‘Dick’ McCoy	Friends of the Lakeshore Nature Preserve (former board member)
3	Sissel Schroeder	UW Dept. of Anthropology
4	Bill Barker	UW CALS (former chair of Preserve Committee)
5	Evelyn Howell	UW L&S, Planning & Landscape Architecture
	Laura Wyatt	Observer, Preserve staff

	Stakeholder Meeting #2	Thursday, April 25, 2019; 1:30 to 3:00 PM Union South TITU
1	Kris Ackerbauer	UW-Madison Physical Plant
2	Janet Batzli	Biocore
3	Susan Carpenter	UW Arboretum
4	Jennie Casavant	Wisconsin Foundation & Alumni Association
5	Benjamin ‘Ben’ Futa	UW-Madison Allen Centennial Garden

6	Kennedy Gilchrist	Friends of the Lakeshore Nature Preserve
7	Chris Hittinger	UW CALS, Genetics
8	David Drake	UW FEW, Wildlife
9	Mark Kenoyer	UW Anthropology
10	Missy Nergard	UW Sustainability Office
11	Scott Patterson	Army ROTC
12	Matt Reetz	Madison Audubon Society
13	Phil Townsend	UW-Madison Forestry & Wildlife Ecology
14	Kyle Webert	UW Botany Department
15	Susan 'Suzy' Will-Wolf	Emeritus, UW Botany Department
	Gary Brown	Observer, Preserve staff
	Laura Wyatt	Observer, Preserve staff

	Friends of the Lakeshore Nature Preserve	Monday, April 29, 2019; 5:00 to 6:30 PM 30 N. Mills Street, Lake Conf Room 405
1	Galen Hasler	Former Friends of the Lakeshore Nature Preserve Board member
2	Doris Dubielzig	Friends of the Lakeshore Nature Preserve Board, Out-going President
3	MJ Morgan	Friends of the Lakeshore Nature Preserve Board
4	Paul Noeldner	Friends of the Lakeshore Nature Preserve Board
5	Steve Sellwood	Friends of the Lakeshore Nature Preserve Board
6	Steve Sentoff	Friends of the Lakeshore Nature Preserve Board, In-coming President, UW Alum
7	Lillian Tong	Friends of the Lakeshore Nature Preserve Board, UW Emeritus, WISCIENCE
	Gary Brown	Observer, Preserve staff
	Laura Wyatt	Observer, Preserve staff

	Stakeholder Meeting #3	Wednesday, May 1, 2019; 10:00 to 11:30 AM Memorial Union, TITU
1	Ellen Agnew	UW Grounds
2	Aaron Bird Bear	UW School of Education
3	Glenda Denniston	Preserve Volunteer
4	Gretel Dentine	Eagle Heights Community Gardens
5	Brad Herrick	UW Arboretum
6	Roma Lenehan	Preserve Volunteer
7	John Magnuson	UW Emeritus, Dept. of Limnology
8	Ken Potter	UW Emeritus, Civil & Environmental Engineering
9	Janet Silbernagel	UW Dept. of Planning & Landscape Architecture
10	Adrian Treves	UW Nelson Institute
11	Jackie Sandberg	Bird Banding Station
	Laura Wyatt	Observer, Preserve staff