

**NALMS**



***STRATEGIC PLAN  
FY 2017 - 2020***



A lake is the landscape's most beautiful and expressive feature.  
It is earth's eye;  
looking into which the beholder measures the depth of his own nature.  
~Henry David Thoreau

## ***Preamble***

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The North American Lake Management Society (NALMS) was founded in 1980 with intentions to focus on the health and management of lakes and reservoirs for a wide variety of uses. To do this it is necessary to address land management practices influencing not only lakes and reservoirs but also the management of streams, wetlands, and estuaries as an integrator of ecosystem processes from multiple resource types.

NALMS is updating the strategic plan to focus on the basic tenants of membership, communication, the NALMS brand and financial health for sustainable growth. Though this strategic plan will ideally guide NALMS for a three year period (2017-2020), the plan is a living document and will be updated as NALMS continues to grow and excel. In addition, a formal review of this plan will be conducted in 2020 and every five years thereafter to evaluate the need for modification and updates.

The focus of each successive strategic plan is to build upon past successes and identify new initiatives that can assist NALMS in meeting future challenges and opportunities. The result is an updated plan detailing NALMS' priorities and direction.

**NALMS' mission** statement describes the role in the environmental arena—managing, protecting, and improving our lake water resources. Our staff's renowned competence and professionalism and our members' expertise are key factors in providing this service.

**NALMS' values and behaviors** are our collective sentiments and beliefs, and they represent the cornerstone principles for what our organization aspires to be as well as expectations for the membership.

Additionally, NALMS' newly approved **Code of Conduct** serves as a compass by which NALMS' efforts and events should be guided.

In addition to goals that provide specific direction, key performance measures (KPM) are a core component of our strategic plan, in order to gauge success and monitor our performance.

### **NALMS' Fundamental Goals:**

1. Identify needs and encourage scientific research on lake and reservoir ecology and watershed management.
2. Facilitate the exchange of information on the technical and administrative aspects of managing lakes/reservoirs and their watersheds.
3. Promote public awareness of lake and reservoir ecosystems and the management challenges they face.
4. Encourage public support for national, state or provincial, and local programs promoting sustainable/long-term/effective management of lakes/reservoirs and their watersheds.
5. Provide guidance to public and private agencies involved in or planning management activities for lakes/reservoirs and their watersheds.

6. Provide a forum for professional development and training of all persons engaged in any aspect of managing lakes/reservoirs and their watersheds.

The success in implementing this strategic plan can only be determined in the coming years. Regardless, the process for developing this plan is valuable in itself as it provides a mechanism for NALMS to thoroughly assess how well the organization serves its membership.

## ***Mission***

The mission of the Society is to forge partnerships among citizens, scientist, and professionals to foster the management and protection of lakes and reservoirs for today and tomorrow.

## ***Vision***

NALMS, through its membership and actions, seeks to be the repository and distribution hub for the body of knowledge, derived through scientific research and practical experience, that can be summed into the concept of lake and reservoir management, while acting as an intermediary to promote the use of best management practices for all activities that affect our watersheds so as to optimize conditions for all living creatures that are dependent on the water contained therein.

## ***Values and Behaviors***

### **Professional and Ethical:**

We, the North American Lake Management Society, dedicate ourselves to applying expertise and the highest vocational standards in formulating recommendations and making decisions that are based on good science/solid evidence. We will conduct our business in a fair, honest, and ethical manner that values diversity of views, expertise, opinions and backgrounds of others.

### **Invest in People:**

We value and strive to maintain a diverse membership at all levels of our organization and to provide relevant programs and services to benefit all members of the Society. We support the enhancement of our employees and their professional growth by providing opportunities to attend training and seminars and make presentations, as well as by providing good work equipment and appropriate compensation.

### **Deliver Commitments:**

Staff, Board of Directors, committee chairs/members and liaisons make their best efforts to provide the highest quality information and responses within a timely manner.

### **Shared Decision-Making:**

We encourage input into decisions made by staff, Board of Directors, committee chairs and members.

### **Responsibility and Respect:**

All committee members and the Board of Directors accept responsibility to incorporate the above values and behaviors, to complete all work assigned in a professional and timely manner, and to take initiative to suggest and implement improvements in the way we do business. By accepting assigned responsibilities, NALMS' staff, BOD members, committee chairs/members, and liaisons gain the respect of our members

## **NALMS Code of Conduct**

*Final version approved by the Board of Directors on 9/7/17*

The North American Lake Management Society commits to promoting a welcoming environment while fulfilling our mission of forging partnerships among citizens, scientists, and professionals to foster the management and protection of lakes and reservoirs. We intend to do this during daily operations, which include the annual NALMS symposium, by fostering environments that are safe, collaborative, supportive, and productive for all members and attendees, including sponsors, exhibitors, guests of members, invited speakers, and members of the media. We intend to conduct our business in a fair, honest, and ethical manner that values the diversity of views, expertise, opinions, backgrounds, and experiences reflected among our membership and all conference and event attendees.

All attendees, speakers, sponsors and volunteers at our conference are required to abide by the following code of conduct. Organizers will be available for those that need to report an incident or concern. We expect cooperation from all participants to help ensure a safe, welcoming and inclusive environment for everyone.

### Expected Behavior

- Treat everyone with respect.
- Communicate openly and thoughtfully and be considerate of varying views, opinions, levels of experience, and backgrounds.
- Be respectful in your critique of ideas and avoid personal attacks directed toward other attendees, participants, NALMS staff, sponsors, and vendors.
- Respect the rules and policies of the symposium venue, hotels, NALMS contracted facilities, or any other venue.
- Be mindful of your surroundings and fellow participants. Alert a NALMS staff member or designated contact person if you notice unacceptable behavior, a dangerous situation or someone in distress.

### Unacceptable Behavior

- Harassment and intimidation, including any verbal, written, or physical conduct designed to threaten, intimidate, or coerce another attendee, speaker, volunteer, exhibitor, NALMS staff member, service provider or other meeting guest;
- Discrimination based on gender or gender identity, sexual orientation, age, disability, physical appearance, body size, race, religion, national origin, or culture; or
- Physical or verbal abuse of any attendee, speaker, volunteer, exhibitor, NALMS staff member, service provider or other meeting guest.
- Examples of unacceptable behavior also include, but are not limited to: inappropriate use of nudity and/or sexual images in public spaces or in presentations; threatening or stalking any NALMS symposium participant; or sexually harassing any NALMS symposium participant.
- Disruption of talks at oral or poster sessions, in the exhibit hall or at other events organized by NALMS at the meeting venue, hotels, or other NALMS contracted facilities is not allowed.

### Consequences

- Anyone requested to stop unacceptable behavior is expected to comply immediately.
- NALMS staff (or their designee) or security may take any action deemed necessary and appropriate, including immediate removal from the meeting without warning and potentially without refund.
- NALMS reserves the right to prohibit attendance at any future meeting.

### Reporting Unacceptable Behavior

- If you are the subject of unacceptable behavior or have witnessed any such behavior, please immediately notify a NALMS staff member or a designated contact person.

- Notification should be done by contacting a NALMS staff person or the designated contact persons on-site or by e-mailing your concern to one of the designated contact persons.
- Anyone experiencing or witnessing behavior that constitutes an immediate or serious threat to public safety at the symposium location or other NALMS event is advised to either tell a security guard or locate a house phone and ask for security.
- Reporting should never be done via social media.

#### Administration

- Any reports of unacceptable behavior will be handled on a case-by-case basis by one or more of the designated contact persons.
- The Code of Conduct, including contact information for the designated contact persons, will be made available to all members and conference attendees as follows: inserted into the conference program, posted to the NALMS website, and included in the NALMS Operations Manual and Strategic Plan.
- NALMS staff and designated contact persons will be introduced at the beginning of the conference and will make every effort to be visible and available to attendees at the annual symposium.
- The list of designated contact persons will be updated annually prior to publication in the conference program.

#### **Code of conduct adapted from International Marine Conservation Congress (IMMC) and the Ecological Society of America (ESA).**

**<http://conbio.org/mini-sites/imcc-2016/registration-participation/code-of-conduct/>**  
**<https://www.esa.org/esa/meetings/esa-meetings-code-of-conduct/>**

## ***Strategic Goals & Performance Measures***

### *ACTION PLAN: Goal #1*

#### ***Membership***

<b>GOAL:</b>	Increase NALMS' membership to meet the following target numbers by category: <b>KPM:</b> \$185,000 in membership revenue with no more than 25% lapsed membership by region by December 2018 and no more than 15% lapsed membership by region by 2020.
<b>Objectives:</b>	<ul style="list-style-type: none"> <li>◆ Identify gaps in why we fail to retain members (e.g., through graduation (from university/college), change in employer, moving away from a lakeshore property, etc).</li> <li>◆ Increase tangible benefits of membership for each category and establish new categories if appropriate.</li> <li>◆ Develop a process for the Director of Membership and Marketing and regional directors to encourage membership renewal and to convert members who have become inactive to active status.</li> <li>◆ Actively recruit new members, especially students, early career professionals, and local lake and watershed associations.</li> </ul>
<b>Leader</b>	Membership & Marketing Director

Tasks	By Whom	Completion Date
<b>Membership</b>		
Develop annual budget/tasks for committees, programs, activities to determine if they provide benefit to members and society.	President	Annual
Introduce an early career membership category that has the same or similar (perhaps make LRM online access only?) benefit as a student member at a reduced cost for a few to several years after graduation.	Membership & Marketing Director	November 2018
Study conversion rates from student to professional and from professional to Lake Leader membership categories.	Student Director/Membership & Marketing Director	Annual
Collect (anecdotal) info on reasons of non-renewal (Region 2 examples: retirees moving away to the south, technical difficulty with the website, etc.) and recommend solutions for retaining members.	Membership & Marketing Director	Annual
Continue to track current, recently expired and long-term expired members via the Membership and Marketing coordinators routine membership upload.	Membership & Marketing Director	Monthly update 2018; twice annual update thereafter
Contact recently expired members and report to the membership and marketing coordinator on findings on a regional basis.	Membership & Marketing Director/Regional Directors	Monthly update 2018; twice annual update thereafter

<b>Benefit Services</b>		
Every other year starting in 2018, NALMS will review other similar societies' benefits to benchmark our member benefits.	Program Liaison	Annual
Identify and quantify current NALMS benefits and ensure that we continue to meet these at a minimum, and if needed increase members-only benefits. Survey members of these member categories no less than annually to determine if more benefits are desired/why peers do not find these benefits sufficiently attractive to join (at all category types).	Membership & Marketing Director/BOD	Annual
Develop activities and services that attract new members from an array of professions, disciplines, regions, and ethnic backgrounds. Target one membership category annually. Activities and services should be designed to retain members at all levels with a special emphasis on or initiative targeting students, and early career professional members.	Membership & Marketing Director/BOD	Annual
Create member-only streaming and/or webinar content (or discount or fee waiver for otherwise fee-based contents) that is no less than revenue neutral.	Communications committee	Spring 2019
Conduct an annual review of committees and programs to evaluate effectiveness, review work completed and identify relevant committee or program work for the year	BOD	Annual
<b>Marketing</b>		
Increase NALMS visibility via social media, increasing the use of traditional media (press releases/news articles) and maintaining the NALMS website, using 2017 as the benchmark.	Membership & Marketing Director/Communications Committee	Annual
Develop lists to target university programs, professional members, lake leaders, and subject matter experts. Review target member list on an annual basis.	Membership & Marketing Director/BOD/Communications Committee	Annual

***ACTION PLAN: Goal #2***

***Communication***

<b>GOAL:</b>	Implement the 2016 communications manual. <b>KPM:</b> Target: Net annual increase in tracking metrics detailed in the communications manual.
<b>Objectives:</b>	<ul style="list-style-type: none"> <li>◆ Maintain routine communications to members and target members.</li> <li>◆ Utilize social media and emerging technology to promote NALMS and reach a broader audience.</li> <li>◆ Develop new avenues for communicating NALMS' efforts and events.</li> <li>◆ Utilize NALMS positions statements, white papers and subject matter experts to position NALMS as the go-to source for lake and watershed management related information.</li> </ul>
<b>Leader</b>	Communications Committee Chair

Tasks	By Whom	Completion Date
<b>Communication with members – new and old:</b>		
Monthly communication to membership via NALMS Notes and Lake News or targeted announcements	Membership & Marketing Director/Director of Programs & Operations	Monthly
Develop targeted press release list, and then use the press release template to distribute press releases for award winners, certifications received, board elections, and other relevant NALMS news.	Communications Committee/Membership & Marketing Director	PR template: Spring 2018; Press releases quarterly
Generate lake monitoring program target list for Secchi dip-in and membership related communications	Secchi Committee/Secchi Intern	Annually
Develop Lakes Appreciation Month materials and distribute to affiliates and members.	Lakes Appreciation Committee Chair/ Affiliates Liaison	June 30 annually
Communicate lakes appreciation month topics and ideas via the affiliates program, NALMS website, BOD directors, and social media.	Lakes Appreciation Committee/Affiliates Liaison	July annually
Continue to obtain annual Lakes Appreciation Month state proclamations as an opportunity for direct interaction with affiliates.	Lakes Appreciation Committee Chair	July annually
<b>Social Media</b>		
Review NALMS website content no less than annually and update no less than monthly with the latest news and events.	Membership & Marketing Director/Director of Programs & Operations/Communications committee	Annually

Continue to optimize social media platform use and maintain and/or increase each platform's use.	Membership & Marketing Director	Annual review
Highlight student videos on social media and NALMS website	Student Director/Membership & Marketing Director	Quarterly
Determine if hosting or partnering to host webinars or Facebook live or live chat efforts are appropriate for NALMS, then develop and deploy this via social and traditional media as per the communications manual.	Membership & Marketing Director/Communications Committee	Spring 2019
Highlight the certification program via regular posts to social media (highlight CLM or CLP), and focused posts in NALMS notes, on the website and via LakeLine.	Professional Certification Program Chair/Membership & Marketing Director	Quarterly
Develop and maintain a list of hashtags to use routinely for NALMS communications and promote their use.	Membership & Marketing Director/Communications Chair	Fall 2018
<b>New Avenues of Communication:</b>		
Develop a communications mechanism to highlight and celebrate affiliate members	Communications Committee/ Affiliates Liaison	Quarterly
Lakes Appreciation Month press releases, event kits, NPR stories, and marketing partnerships with outdoor related companies to promote NALMS and Lakes Appreciation Month.	Lakes Appreciation Month Chair/Membership & Marketing Director	July annually
Develop Secchi dip-in posting calendar to promote the dip-in, dip-in volunteers, lake monitoring programs, lakes monitored and more.	Secchi Committee/Secchi Intern	Calendar developed & deployed 2018; annual review/use
Generate target list of stream, lake, watershed, engineering or other lake or watershed management related companies and university based programs to distribute information about NALMS and the certification program.	BOD/Membership & Marketing Director	Fall 2018 list; Quarterly review
Develop a hot topic response mechanism and deploy this whenever a hot topic is identified as detailed in the Communication Plan.	Communications Committee	Fall 2018
<b>NALMS as the Go-To on Lake and Reservoir Issues:</b>		
Develop and annually review a list of subject matter experts that can be accessed via the NALMS website.	Communications Committee	Spring 2018 initial list; approve annually thereafter
Develop white papers to expand upon position papers and once complete, distribute per the communications manual	Policy Committee	One paper developed annually
Annually review and update position statements.	Policy Committee	Annually

<b>Student-Targeted Communications:</b>		
Develop a communications mechanism to highlight and celebrate student travel and student paper award winners via social and traditional media	Student Director/Communication Committee/Membership & Marketing Director	Annually post conference
Annually review the effectiveness of and any modifications needed for the student videos program.	Student Director/Membership & Marketing Director	Annually spring
Work with the student program to post and highlight student winners of videos submitted via the student video program.	Student Director/Membership & Marketing Director	Quarterly

**ACTION PLAN: Goal #3**

**NALMS Brand**

<b>GOAL:</b>	Establish NALMS as the pre-eminent source of information and direction for activities concerning lake and reservoir and watershed management. <b>KPM:</b> Target: Net annual increase in website and social media interactions, Dip-in data submissions, publication subscriptions, partnership interactions, Lake Appreciation Month events and position statement/white papers developed and accessed.
<b>Objectives:</b>	<ul style="list-style-type: none"> <li>◆ Market the NALMS brand including the Secchi Dip-In, Lakes Appreciation Month, Lake and Reservoir Management, LakeLine and NALMS website.</li> <li>◆ Establish partnerships with like-minded organizations including but not limited to CASS, APMS, AFS, and NWQMC.</li> <li>◆ Review committees annually providing an annual work plan and analysis of previous work.</li> <li>◆ Use NALMS' positions statements, white papers, and subject matter experts to position NALMS as the go-to source for lake- and watershed management related information.</li> </ul>
<b>Leader</b>	

<b>Tasks</b>	<b>By Whom</b>	<b>Completion Date</b>
<b>Citizen Scientist:</b>		
Identify options for expanding Secchi Dip-In to include more robust citizen science monitoring options such as HAB, invasive plants, microplastics, etc.	Secchi Committee/Secchi Intern	Spring 2018 options and annual review
Update the Secchi Dip-In Database.	Secchi Committee/Secchi Intern/BOD/Staff	Annually in June
Identify mechanism to fund Secchi Dip-In data analysis and potential nationwide compilation of volunteer collected Secchi data for nationwide analysis.	Secchi Committee/Secchi Intern/Grants Committee	Fall 2018
Continue to promote and manage the Secchi Dip-In providing annual reports to Secchi Dip-In participants, USEPA and NALMS members and uploading data annually to EPA national database (e.g., STORET, WQP)	Secchi Committee/Secchi Intern	May – Sept annually
Update the HAB program web content, then once updated, promote the HAB program webpage as a one-stop-shop for state-of-the-art information about cyanobacteria.	Inland HAB/Communications Committee/Membership & Marketing Director	Fall 2018
<b>Professional Scientists:</b>		
Promote NALMS as being the “go to source” for lake management information outside of our niche market.	Membership & Marketing Director/Director of Programs & Operations	Monthly

Review all NALMS position statements annually and develop no less than one new position statement and white paper annually.	Policy Committee	Annually
Review lake-management focused publication needs and identify no less than one publication to produce annually in web-based format.	Publications/Communications Committees	Annually
Review LakeLine publishing options and determine if an online flip-based publication or continued publication of the paper version is the preferred and/or most cost-effective option. Add survey to conference to gather member feedback. <ul style="list-style-type: none"> <li>The BOD voted to stop printing paper copies in 2019; however, we review the outcome of the member survey.</li> </ul>	Publications/Communications Committees	Fall 2018
Work with the LakeLine editor & publications committee to develop options for providing copies annually for purchase and distribution by affiliate, nonprofit or lake association members and at no cost to NALMS. Topic and content should be identified in advance and reviewed to ensure it is interesting and relevant to target audience.	LRM editor/Affiliates Liaison	Annually
Promote the NALMS CLM/CLP program, highlight CLM/CLPs via social media, and celebrate each new or renewed CLM/CLP via traditional and social media.	Professional Certification Committee Chair/Membership & Marketing Director	Quarterly
Work with the conference to ensure the symposium remains the cornerstone of NALMS.	Conference Committee	Annually
Continue to provide LakeLine on a quarterly basis and work with the publications committee and LakeLine editor to keep content relevant and timely.	LL editor/Publications committee	Quarterly
Continue to provide Lake and Reservoir Management on a quarterly basis and work with the publications committee, LRM editor and editorial board to keep content relevant and timely.	LRM editor/Publications committee	Quarterly
<b>Students:</b>		
Continue to promote quarterly student video contest, generate quality video and promote distribution of student materials	Student Director/Membership & Marketing Director	Quarterly
Promote the availability of student travel grants to all student members, standardize grant application processes and move review of student travel grants to the student program	Student Director/Membership & Marketing Director	Annually prior to conference

Highlight student travel grant award winners and student presentation award winners via social media, NALMS Notes and Lake News and NALMS website.	Student Director/Membership & Marketing Director	Annually post conference
<b>Affiliates and Partner Organizations:</b>		
Promote lake management at other societies' conferences.	BOD/members	Continuous
Identify organizations (e.g. fisheries management, agronomy, forestry, urban development) representing other themes that have ties to lake/watershed management for potential partnership opportunities & promote at their conferences.	Partnership Program/Committee	One group/year
Designate a group (e.g. universities/colleges, private consulting firms, government entities) to be contacted annually to demonstrate the strengths of NALMS and benefits of alignment with the society and possible membership, with the purpose of promoting ourselves, more memberships, more interactions.	Partnership Program/Committee	One group/year
Establish an ongoing dialog with sister/partner organizations including but not limited to CASS, APMS, AFS, and NWQMC.	Partnership Program/Government Affairs Committee	Continuous
Engage in activities, such as development of education materials, co-hosted technical sessions, and joint meetings with associated entities.	Education & Outreach and Conference Committees	Continuous
Generate no less than quarterly communication with affiliate members including providing a NALMS update for affiliate newsletter use.	Affiliates Liaison/Membership & Marketing Director	quarterly
Ad Hoc Government Affairs committee to coordinate with EPA to expand cross promotion of NALMS and EPA	Ad Hoc Government Affairs /Communications Committee	Annually
Ad Hoc Government Affairs committee to coordinate with USACE to expand cross promotion of NALMS and USACE.	Ad Hoc Government Affairs /Communications Committee	Annually
Ad Hoc Government Affairs committee to begin tracking relevant national and regional legislation and distribute to membership as needed.	Ad Hoc Government Affairs /Communications Committee	Fall 2018
NALMS shall interact with other professional societies and organizations including but not limited to CASS, APMS, AFS, and NWQMC to exchange information and ideas, build collaborations, and promote science-based management.	Partnership Program/Committee	Annually
<b>All:</b>		
Annually review each committee's composition, role, and outputs	President/Excom	Annually

***ACTION PLAN: Goal #4***

***Finances***

<b>GOAL:</b>	Diversify funding sources and the transparency of society finances. <b>KPM:</b> Target: More balanced revenue stream compared with 2017 funding, balance with a goal of by 2020 having enough reserves to support the Society for no less than 1 year.
<b>Objectives:</b>	<ul style="list-style-type: none"> <li>◆ Generate sufficient conference revenue to cover all conference-related tasks and expenses, including the portion of the Director of Program and Operations' conference-related duties and the stipend/contract for the Conference Coordinator, with sufficient net proceeds to provide core support for NALMS administration and general operating expenses.</li> <li>◆ Increase membership to sufficient levels to fully fund the Director of Marketing and Membership and all committee-based work and provide core support for delivery of program services and membership benefits (approximately \$185,000).</li> <li>◆ Implement a sponsorship strategy to fund the LakeLine editor and all LakeLine related expenses utilizing advertising and sponsorship dollars.</li> <li>◆ Pursue grant, sponsorship and partnership opportunities to expand the Secchi Dip-In program and update the Dip-In database.</li> </ul>
<b>Leader</b>	Financial Committee Chair

Tasks	By Whom	Completion Date
Reactivate the Finance Committee to provide oversight and direction on financial management and audits	Financial Committee	2017 annual meeting
Review current revenue streams and identify options for diversifying funding.	Financial Committee/Grants Committee/BOD	Fall 2018; annual review
Identify options to reduce conference expense and increase conference revenues.	Financial Committee/Conference Committee/BOD	Fall 2018
Increase membership income to \$185,000 by 2020 including reduce lapsed member rate to no more than 25% per region by December 2018 and no more than 15% per region by 2020, using 2015-2017 as the baseline.	BOD	Fall 2020
Generate target list of potential advertisers for LakeLine, then contact with updated sponsorship package.	Membership & Marketing Director/BOD	Summer 2018
Populate regional target list focusing first on corporate member opportunities then expanding to university-based, governmental and student targets.	BOD/Membership & Marketing Director	Fall 2018
Generate target list of grant opportunities and target no less than one grant annually. Focus should target the Secchi Dip-In, publications and/or education and outreach programming.	Grants Committee/ Education & Outreach Committee/Publications Committee/ Secchi Committee	Continuous; annual review
Identify potential grants and donors for expanding current programming such as the Secchi Dip-In.	BOD	2018 mid-term and annual meetings