



# Strategic Plan Process Update

## January 25 Board Meeting

### Supplemental Materials

*Prepared for the Delta Conservancy by Kearns & West  
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## Strategic Plan Update – Board Meeting Process

The following is a proposed process for the January 25 Strategic Plan status update and Conservancy Board discussion.

- OBJECTIVES:
- Share proposed Strategic Plan structure/content with Conservancy Board
  - Receive Board input on the proposed Strategic Plan structure/content
  - Confirm Board support for Strategic Plan overarching Goals

Item / Time	Topic	Lead
#1 30 minutes	<i>Strategic Plan Overview: process, input, status, proposed content and structure</i>	K&W Conservancy
#2 75 minutes	<p><i>Break-Out Sessions:</i></p> <p>Divide into two groups to alternate discussions on two Strategic Plan topics and associated questions:</p> <ol style="list-style-type: none"> <li>1) <b>Strategic Plan content</b> (i.e., specific Goals and Program Objectives):               <ol style="list-style-type: none"> <li>a. What does success look like for each Goal?</li> <li>b. What actionable planning, project, and partnership opportunities would lead to successful achievement of Program Objectives? (Provide 2-3 examples.)</li> <li>c. What can/should be measured for each Goal to track performance over time?</li> </ol> </li> <li>2) <b>Strategic Plan focus and organization</b> (i.e., Strategic Plan direction and structure)               <ol style="list-style-type: none"> <li>a. Does the annotated outline strike the right balance between organizational aspiration/vision and measurable objectives and goals?</li> <li>b. Based on the proposed 2017 Strategic Plan Goals and Objectives, identify a potential collaboration with another agency or organization that would help the Conservancy achieve success and create value.</li> </ol> </li> </ol>	All
#3 15 minutes	<i>Break</i>	All
#4 65 minutes	<i>Full Board Input Session: reconvene from break-out groups to re-cap group input and receive individual Board member perspectives</i>	Conservancy All
#5 10 minutes	<i>Key take-aways and Strategic Plan next steps</i>	K&W Conservancy

*\*Note that times are estimates and may be adjusted as needed*

## Summary of Strategic Plan Feedback

This section summarizes key 2017 Strategic Plan Update (2017 Plan) feedback received through implementation of the Strategic Plan Outreach Toolkit. Strategic Plan input was received from internal and external sources through multiple forums and tools: online surveys targeting four distinct audiences (Conservancy Board members, members of the public, key agency contacts, and Conservancy staff); two public workshops held in the North and South Delta respectively; and in-person meetings with state agency representatives and Conservancy staff.

The following bullets catalogue high-level feedback that will be considered in development of the 2017 Strategic Plan Update.

### Survey Results – Board, Public, Agency, Staff

Three online surveys were distributed in September to the following target audiences: Conservancy Board members, members of the public (through the Conservancy’s distribution list), and key Delta agency contacts. A total of 17 survey responses were received: 11 from Board members; one from agency staff, and five from the public. Additionally, Conservancy staff individually responded to an online survey on Strategic Plan organization in early December [eight responses]. The following bullets are key takeaways that emerged from the surveys. Unless otherwise noted, the bullets highlight input for which there was a minimum of two responses in agreement. It should be noted that responses were varied.

#### Board Survey Responses (n=11)

- ◆ 80% of respondents use or reference the Strategic Plan two or fewer times per year.
- ◆ The 2017 Plan Update should be made more concise; Conservancy decisions/Board presentations should be consistent with the Plan and consistencies should be emphasized.
- ◆ The distribution of Proposition 1 (Prop 1) grant funding is among the greatest Conservancy accomplishments, and the successful continuation of Prop 1 fund delivery and programming is identified as a top Conservancy priority.
- ◆ Other top priorities identified by multiple respondents include improvement of Conservancy visibility, leadership and credibility within the Delta; collaboration with related Delta efforts; cultivation of sustainable funding; and staff retention.
- ◆ The 2017 Strategic Plan should include fewer and more focused goals that are connected to measurable outcomes for future success tracking.
- ◆ Goal #3 (collaboratively lead Delta ecosystem restoration) and Goal #4 (gather and communicate Delta ecosystem and economic information) were identified as the ‘greatest opportunity for the Conservancy to make a significant impact over the next five years’ by three respondents.

#### Public Survey Responses (n=5)

- ◆ The Conservancy has made some progress defining its value-added role in the Delta, but there is still a need for additional progress and definition.
- ◆ Effective and relevant implementation of Prop 1 should be a primary Conservancy focus.
- ◆ The Conservancy should promote economic and environmental resiliency in the Delta.
- ◆ Among the challenges still facing the Conservancy are establishing credibility and trust with local communities and establishing a niche.

- ◆ Economic enhancement and development of a Delta brand and ‘sense of place’ appear to be of lesser value than other Conservancy actions, primarily because results have not been seen; there is some sentiment that the Conservancy should therefore focus its resources elsewhere.
- ◆ The 2017 Strategic Plan should include fewer, more focused goals.

### **Agency Survey Responses (n=1)**

Note that additional agency feedback gathered via in-person meetings is catalogued below.

- ◆ There is some agency support for the Conservancy to serve as a restoration site manager or conservation easement holder.

### **Staff Survey Responses (n=8)**

The results from this survey are reflected in the *Annotated 2017 Strategic Plan Outline* below.

### **Public Workshops**

Two public workshops were conducted to receive input from members of the public; in Walnut Grove on October 19, and in Oakley on October 26. A total of 10 participants (non-Conservancy staff, Board members, or Conservancy consultant) attended the two workshops. The following are key themes that emerged during the workshops.

#### **Strategic Plan Workshop #1 – Walnut Grove, CA**

- ◆ The Conservancy should identify what makes it unique as an agency with respect to other Delta and State agencies and use this information to optimize programmatic planning accordingly.
- ◆ There was support for the Conservancy owning and managing land in the Delta, but perspectives on the Conservancy’s purpose for and approach to land ownership varied.
- ◆ The Conservancy should leverage impact through partnerships; identified partners included but were not limited to: the Delta Protection Council, the US Army Corps of Engineers, CA Department of Fish and Wildlife, and the US Fish and Wildlife Service.
- ◆ Perspectives on Conservancy focus varied. Some suggested that the Conservancy focus narrowly on one or two program areas (e.g., ecosystem restoration) to maximize the impact of Conservancy resources and capacity, whereas others emphasized the value of the Conservancy working across several program areas (e.g., ecosystem restoration, agricultural lands, and recreation and tourism) in order to leverage multiple benefits and maintain flexibility as an agency.

#### **Strategic Plan Workshop #2 – Oakley, CA**

- ◆ The Conservancy should work with Delta residents on the three primary elements of Conservancy programs including ecosystem restoration, agriculture and the Delta economy, and recreation and tourism.
- ◆ The Conservancy should leverage impact through partnerships; identified partners included but were not limited to: the Delta Stewardship Council, CA Department of Conservation, USDA, and East Bay Regional Parks.
- ◆ The Conservancy should work with educational programs through local schools including the community colleges (San Joaquin Delta Community College; Solano CC, Delta Science Center –

travel exhibit; San Joaquin Historical Society) and visit primary schools and programs such as the Student Stewards of the Lower Calaveras River, and East Bay Regional Parks.

- ◆ The Conservancy should undertake broader outreach through the farm bureaus and hard copy announcements at local businesses as many of the public are not communicating through electronic means (i.e., Facebook, email etc.).

### Agency Meetings

Conservancy staff leadership (Campbell Ingram and Debra Kustic) met with six state agencies in December to share a proposed approach to the Conservancy's 2017 Strategic Plan and solicit feedback. As

*Conservancy staff agree that the 2017 Strategic Plan Update is a key opportunity to further define the Conservancy's identity in the landscape of Delta-focused agencies and organizations. Staff are keen to strategically bolster Delta leadership in areas of work that are complementary to sister agency efforts and reflective of the Conservancy's strengths.*

part of each meeting, Campbell shared with agency representatives the following six key identity/focus areas considered central to framing the Conservancy's role within the 2017 Strategic Plan Update.

**Planning:** Continue to lead planning efforts in partnership with local interests and agencies to develop locally-supported restoration strategies that identify the highest priority ecological opportunities and that function with working landscapes.

**Ecosystem Restoration:** Continue to be a lead agency for restoration across all ecosystem processes and habitat types as identified in the Delta Conservation Framework (DCF) and in the completed regional restoration strategies. Support non-Biological Opinion elements of EcoRestore and continue restoration efforts once EcoRestore objectives are complete. Use completed DCF and regional restoration strategies to secure funding for restoration.

**Convening:** Bring together Delta interests and agencies to solve key problems that affect multiple interests. Help connect parties interested in restoration to priorities within the DCF, and to regional strategies with partners in order to facilitate the implementation of high value projects.

**(Potential) Land Ownership/Management:** Work with community members and agencies to define the Conservancy's role in land ownership and to seek pilot projects.

**Economic Development:** Work with the marketing task force to finalize the 5-year marketing plan. Support implementation of the plan through ongoing coordination and continued help securing the necessary funding.

**Delta Carbon Management:** Continue to support efforts to develop incentives for carbon-based land management in the Delta.

### Areas of Agency Consensus/Key Themes

Agency representatives offered their thoughts on the proposed 2017 Plan content and identity/focus areas. The following themes represent feedback that was provided by two or more agencies (in no particular order):

- ◆ Support for Conservancy playing a land owner/manager role, but uncertainty around how this role would manifest in reality
- ◆ Interest in the Conservancy's continued work on carbon credits

- ◆ Appreciation for the Conservancy's intention to avoid competing with existing agency roles
- ◆ Support for the continuation of a successful and smooth Prop 1 grant program
- ◆ Interest in leveraging partnership with the Conservancy where synergies exist

### Other Feedback by Agency

The following bullets catalogue additional input distilled from each of the agency meetings (presented in no particular order or priority). Agency input relates to the Strategic Plan and well as future Implementation Plans and general Conservancy functions.

#### *California Natural Resources Agency (CNRA) – David Okita, Kris Tjernell*

- Land management/ownership is the biggest 'question mark,' but CNRA envisions distinct potential for the Conservancy to catalyze/support/fill-in DWR and CDFW work in this arena.
- Recognizes the Conservancy's potential to contribute to 'umbrella-level' of Delta planning and integration of science-based adaptive management is tremendous (e.g., Cache Slough, Yolo Bypass).
- CNRA envisions the Conservancy solidifying links between state agency planning and community/local efforts.
- CNRA expects the Conservancy to stay plugged into and aware of state objectives in other areas (e.g., Water Quality Control Plan, Drought in the Delta, etc.).
- CNRA stated that there may be benefit to extending the public feedback period for the Strategic Plan draft.
- CNRA emphasized the value of continuing to lead a smooth and successful Prop 1 grant program to building Conservancy credibility.
- David Okita expressed that the Conservancy may lend value in creating collective agreement and thinking regarding areas such as integrated modeling and adaptive management.

#### *Department of Water Resources (DWR) – Bill Harrell, Russell Stein, Cindy Messer*

- DWR is interested in the Conservancy's support with respect to land management challenges that persist beyond achievement of 8,000 restored Delta acres (e.g., endowment manager, etc.). DWR is drafting a white paper that will catalogue land management challenges in the Delta.
- DWR sees the Conservancy as potentially helping overcome the 'postage stamp effect' through synthesis/coordination of different Delta efforts such as the Delta Conservation Framework.
- DWR wondered about the Conservancy's role with respect to restoration/ adaptive management (e.g., in the context of EcoRestore).
- DWR raised the concept of managing a long-term endowment to fund ongoing operation and maintenance for restoration projects.
- DWR expressed interest in the Conservancy reinvigorating the Delta Restoration Network.
- DWR is interested in reviewing the draft Strategic Plan this spring.

#### *Delta Science Program (DSP) – Cliff Dahm, Rainer Hoenicke*

- DSP expressed interest in following through on some Science Enterprise Workshop outcomes such as the integration of social sciences and resources economics into Delta work.
- DSP suggested exploring tools to assist other agencies in managing multi-funding partner efforts and facilitating fund management.
- DSP encouraged the Conservancy to look at large-scale restoration successes for guidance on the convener/planning role that the Conservancy seeks to fill (e.g., Yolo Bypass).

- DSP supported the Conservancy's work in getting carbon credits on the market, and posed questions on how the Conservancy can build capacity for this task in partnership with DPC, DFW, etc.
- DSP expressed that the Conservancy may be of assistance in helping improve outreach in support of future Prop. 1 funding rounds.

*US Bureau of Reclamation (USBR) – Michelle Banonis, Sandra O’Roak*

- USBR's primary focus has been operations, but may be exploring a more holistic approach and ecosystem restoration in order to off-set operations and would be interested in brainstorming with the Conservancy, Delta Stewardship Commission, and others regarding how to integrate restoration.
- Undertaking 3-5 year re-initiation of the Biological Opinions (BiOps). May explore whether linking long term operations and maintenance to the BiOps makes sense.
- A stakeholder meeting with water agencies and Non-Governmental Organizations will be held February 14.

*CA Department of Fish and Wildlife – Carl Wilcox, Helen Birss, Scott Cantrell, Brooke Jacobs*

- CDFW was interested in how the Conservancy has tracked 2012 Strategic Plan outcomes and how the Conservancy plans to integrate/present the multiple pieces of the Delta planning puzzle (i.e., BiOp, Heritage Program, Flood Planning, etc.).
- CDFW indicated that the agency has internal objectives that dove-tail nicely with the Conservancy's marketing/branding efforts, and advised that the Conservancy ensure outreach to County-level managers with respect to branding/economic development efforts.
- CDFW suggested using an economic impact analysis tool/model (e.g., IMPLAN) to study both positive and negative economic impacts on a local Delta scale such that the results are not diluted by a state-wide economic analysis scope.

*Delta Protection Commission (DPC) – Erik Vink, Natasha Nelson*

- Expressed an interest in coming to mutual agreement among Delta agencies regarding the acreage of publically owned land in the delta and map the lands and adjacent areas.
- Interested in partnering with the Conservancy for waterway clean-up efforts (e.g. Creek Week clean-ups). Discussed Conservancy taking the lead on logistics and DPC taking the lead on outreach. Also discussed interest in organizing future tire amnesty events.

### Internal Conservancy Meetings

Conservancy staff offered their perspectives on the direction of the Strategic Plan Update in three all-team meetings – one in late August, the second in mid-September, and the third in early December. The following are key themes that emerged during the meetings.

Staff agreed that the 2017 Update should modify, eliminate, and consolidate many of the Goals, Objectives, and Strategies identified in the 2012 Strategic Plan. Staff suggested that the 2017 Plan should:

- ◆ Clarify and assert the Conservancy's leadership roles in the Delta and explore the Conservancy in new/enhanced roles including those of land owner/manager, collaborative planner, and community involver

- ◆ Emphasize the importance of constructive partnerships/collaborations with other agencies, organizations, and the Delta community and identify objectives for strengthening these partnerships and relationships
- ◆ Support the continuation of a successful Prop 1 Program and the implementation of the Delta Marketing Plan
- ◆ Maximize the potential for long-term funding leverage and planning
- ◆ Consider how Conservancy leadership and staff expertise can be institutionalized (e.g., via succession planning)
- ◆ Advance/expand existing programmatic work in the areas of water quality, carbon sequestration in wetlands, habitat enhancement on working lands, invasive species management, and Delta recreation and tourism
- ◆ Demonstrate how individual programs contribute to multiple goals

## Proposed 2017 Strategic Plan Update Organization

This section summarizes a proposed organizational approach for the development of the 2017 Strategic Plan. In response to feedback received from Board members, the public, agency representatives, and Conservancy staff, the proposed structure focuses on three high-level Conservancy Goals and supports each Goal with Objectives organized by Program area. Programs typically support aspects of multiple Goals and are reflected across Goals with specific supporting objectives. Conditions for success and performance measures will also be developed for each Goal to focus Conservancy efforts and track progress over time.

**DEMONSTRATION TABLE: 2017 STRATEGIC PLAN UPDATE PROPOSED STRUCTURE**

<b>GOAL 1: Delta Agricultural and Economic Success</b>	<b>GOAL 2: Delta Ecosystem Resilience</b>	<b>GOAL 3: Conservancy Organizational Strength and Sustainability</b>
<p><b>Objectives</b></p> <p><b>DELTA ECONOMIC DEVELOPMENT AND AGRICULTURAL SUSTAINABILITY PROGRAM</b> <i>Objectives</i></p> <p><b>ECOSYSTEM RESTORATION &amp; PROTECTION PROGRAM</b> <i>Objectives</i></p> <p><b>GRANT/FUNDING PROGRAM</b> <i>Objectives</i></p> <p><b>COMMUNITY INVOLVEMENT</b> <i>Objectives</i></p> <p><b>ETC.</b></p>	<p><b>Objectives</b></p> <p><b>DELTA ECONOMIC DEVELOPMENT AND AGRICULTURAL SUSTAINABILITY PROGRAM</b> <i>Objectives</i></p> <p><b>ECOSYSTEM RESTORATION &amp; PROTECTION PROGRAM</b> <i>Objectives</i></p> <p><b>GRANT/FUNDING PROGRAM</b> <i>Objectives</i></p> <p><b>COMMUNITY INVOLVEMENT</b> <i>Objectives</i></p> <p><b>ETC.</b></p>	<p><b>Objectives</b></p> <p><b>DELTA ECONOMIC DEVELOPMENT AND AGRICULTURAL SUSTAINABILITY PROGRAM</b> <i>Objectives</i></p> <p><b>ECOSYSTEM RESTORATION &amp; PROTECTION PROGRAM</b> <i>Objectives</i></p> <p><b>GRANT/FUNDING PROGRAM</b> <i>Objectives</i></p> <p><b>COMMUNITY INVOLVEMENT</b> <i>Objectives</i></p> <p><b>ETC.</b></p>
<p><b>Conditions for Success</b></p> <ul style="list-style-type: none"> <li>◆ Financial</li> <li>◆ Staff resources</li> <li>◆ Partnerships/collaborations</li> <li>◆ Political/legislative</li> <li>◆ Other</li> </ul>	<p><b>Conditions for Success</b></p> <ul style="list-style-type: none"> <li>◆ Financial</li> <li>◆ Staff resources</li> <li>◆ Partnerships/collaborations</li> <li>◆ Political/legislative</li> <li>◆ Other</li> </ul>	<p><b>Conditions for Success</b></p> <ul style="list-style-type: none"> <li>◆ Financial</li> <li>◆ Staff resources</li> <li>◆ Partnerships/collaborations</li> <li>◆ Political/legislative</li> <li>◆ Other</li> </ul>
<p><b>Performance Measures</b></p> <p>How the Conservancy envisions achieving and tracking measurable progress</p>	<p><b>Performance Measure</b></p> <p>How the Conservancy envisions achieving and tracking measurable progress</p>	<p><b>Performance Measures</b></p> <p>How the Conservancy envisions achieving and tracking measurable progress</p>

## Annotated 2017 Strategic Plan Outline

### Introduction

*Emphasize Conservancy accomplishments, experiences, and changes since 2012*

1. Restate Conservancy mission statement, co-equal responsibilities, and institutional background as reflected in the 2012 Plan; highlight key elements of the 2012 Plan and key Conservancy characterizations that remain relevant to the 2017 Plan Update.
2. Identify Conservancy accomplishments since development of 2012 Plan and summarize the current context for Conservancy work in the Delta by answering the questions:
  - a. *How has the Conservancy supported efforts that advance environmental protection and the economic well-being of Delta residents?*
  - b. *How has the Conservancy implemented ecosystem restoration?*
  - c. *How has the Conservancy grown in organizational strength and sustainability?*
3. Signal a shift in the approach to developing the 2017 Update by identifying key internal organizational and external contextual changes since the 2012 Plan (e.g., Proposition 1 funding, breadth and depth of relationships with other Delta agencies, clearer Conservancy role within the Delta, etc.).
4. Define how the 2017 Update organization and content is responsive to a changed Conservancy context by acknowledging how the Conservancy has and will continue to adapt to internal and external changes and how the Strategic Plan reflects a more clearly defined Conservancy role, increases Conservancy organizational focus, and specifies approaches to track Conservancy progress and impact over time.

## GOAL 1: Delta Agricultural and Economic Success

*Preserve valuable working landscapes in the Delta and improve the Delta economic condition by linking Delta agriculture and economic success with sustainable ecosystems.*

### Objectives

#### **DELTA ECONOMIC DEVELOPMENT AND AGRICULTURAL SUSTAINABILITY PROGRAM**

*Objectives*

1. Support implementation of high priority objectives in the Five-Year Delta Marketing Plan
2. In partnership with the Delta Protection Commission, support convening of the Delta Marketing Commission at least twice per year

#### **ECOSYSTEM RESTORATION & PROTECTION PROGRAM**

*Objectives*

3. In collaboration with Delta stakeholders, identify key interconnections between Delta agricultural economy and Delta ecosystem sustainability in order to inform priorities for supporting sustainable and resilient agriculture

#### **GRANT/FUNDING PROGRAM**

*Objectives*

4. Fund agricultural sustainability projects that yield ecological and/or water quality benefits through an effective, transparent Proposition 1 Program
5. Identify and track funding opportunities to support implementation of high priority objectives in the Five-Year Delta Marketing Plan

#### **COMMUNITY INVOLVEMENT PROGRAM**

*Objectives*

6. Work with the Delta community to support selection of Delta Marketing Commission members to implement the Five-Year Delta Marketing Plan
7. Establish an engaged network of farmers and other business stakeholders in the Delta to advise the Conservancy and other Delta agencies on sustainable agriculture efforts in the Delta and to help align Delta economic objectives between fellow Delta agencies and organizations

### Conditions for Success

- ◆ Long-term funding and/or grant funding to support marketing strategies
- ◆ Additional staff marketing experience; a full-time staff person to implement and guide the execution of the Economic Development (and Agricultural Sustainability) Program
- ◆ Community support and alignment on the Delta Marketing Strategy
- ◆ Alignment on Delta economic objectives between the Conservancy Board, relevant Delta agencies, and Conservancy staff

### Performance Measures

- ◆ Number of effective and lasting partnership with Delta agricultural and economic interests
- ◆ Delta economic success (e.g., rate of ecotourism, presence of Delta-branding of products and services, etc.)
- ◆ Public perception of the Delta Conservancy within the Delta business and agricultural community as measured by local polling, self-affiliation with the Conservancy as indicated on websites/products, etc.
- ◆ Integration of economic well-being with ecosystem resilience and restoration (e.g., mutual gains projects and partnerships)

Success is a Conservancy that is seen as a trusted partner in the Delta business and agricultural community, that has leveraged productive agency/organizational partnerships, and that has supported and partnered with efforts that tangibly increase Delta economic and agricultural well-being and that complement Delta ecosystem viability.

## GOAL 2: Delta Ecosystem Resilience

*Work collaboratively to define restoration objectives and fund/implement high priority projects that increase Delta ecosystem resilience, sustain critical habitat and ecosystem functions, and improve water quality.*

### Objectives

#### **DELTA ECONOMIC DEVELOPMENT AND AGRICULTURAL SUSTAINABILITY PROGRAM**

##### *Objectives*

1. Develop and promote incentives for carbon-based land management projects
2. Establish criteria/guidelines to steer decision making regarding Delta Conservancy land ownership/management

#### **ECOSYSTEM RESTORATION & PROTECTION PROGRAM**

##### *Objectives*

3. Protect, restore, or enhance habitat in the Delta via grant-making and project implementation
4. Lead efforts to improve water quality in targeted areas of the Delta in partnership with Delta farmers
5. Complete regional restoration strategies and priorities for the Cache Slough Complex and for additional region(s)

#### **GRANT/FUNDING PROGRAM**

##### *Objectives*

6. Fund high-priority ecosystem resilience projects through an effective, transparent Proposition 1 program, and position the Conservancy to grow its grant program via the next water bond
7. Provide preferential funding and project development resources to identified high priority restoration projects as identified through regional planning efforts

#### **COMMUNITY INVOLVEMENT PROGRAM**

##### *Objectives*

8. Present at, or convene, Delta community/school educational, ecosystem-related events throughout the year
9. Involve Delta community members in the development of regional restoration strategies/priorities and on-the-ground project implementation

### Conditions for Success

- ◆ Long-term funding beyond the lifetime of Proposition 1 funding for grant-making, project development, staffing, and potential land-acquisition and development
- ◆ Additional staff hours/resources to support increased community involvement
- ◆ Clear staff teaming structures, roles, and responsibilities
- ◆ Successful completion of regional planning initiatives that identify appropriate restoration locations and scales (to inform regional restoration strategies/priorities)

### Performance Measures

- ◆ Acreage of protected, restored, or enhanced land
- ◆ Water quality improvements
- ◆ Quantity of carbon sequestered via carbon incentives
- ◆ Success of grant-funded projects
- ◆ Number of effective ecosystem restoration focused partnerships and collaborations
- ◆ Level of community involvement (e.g., number of students/community members attending Conservancy presentations or events, number of community members involved in on-the-ground project implementation, etc.).

Success is a Conservancy that leads locally-supported habitat conservation in the Delta through effective planning, grant-making, and on-the-ground engagement; that sets a model for water quality programming; and that collaborates effectively with local and organizational community members to define and implement restoration priorities.

## GOAL 3: Conservancy Organizational Strength and Sustainability

*Cultivate a durable and effective organization via strategic collaboration, resilient staffing, and long-term financial planning.*

### Objectives

#### ADMINISTRATION

1. Provide a safe, creative, inspiring, and equitable working environment for staff and management consistent with state standards and continuously evaluate and improve organizational efficiency
2. Develop a staff recruitment, retention, and succession plan to retain quality staff, help employees fulfill their career goals, and to ensure the efficient transfer of institutional knowledge

#### GRANT/FUNDING PROGRAM

##### *Objectives*

3. Diversify and expand funding sources to adequately support program work, to sustain current program staff, and to grow staff appropriately to meet program needs and Conservancy goals
4. Identify and plan for potential long-term funding scenarios

#### COMMUNITY INVOLVEMENT PROGRAM

##### *Objectives*

5. Enable sustainable Conservancy operation within, and leverage positive impacts to, the Delta community through the development of effective and lasting relationships and partnerships within the community of Delta residents, businesses, organizations, and agencies
6. Clarify and reinforce the role and purpose of the Conservancy to the Delta community, local entities, and other Delta agencies by deepening existing partnerships and developing new partnerships through project implementation and planning processes

### Conditions for Success

- ◆ Diversified and sufficient long-term funding opportunities (e.g., passage of new bond)
- ◆ Qualified and effective staff
- ◆ Internal focus on and support for organizational goals; internal/external accountability for attaining them
- ◆ Internal and external Strategic Plan buy-in

### Performance Measures

- ◆ Recognition/understanding of Delta Conservancy role/efforts within the Delta community
- ◆ Number of effective and lasting delta partnerships
- ◆ Reliable, adequate, and diverse funding streams
- ◆ Sufficient and qualified staff
- ◆ Successful and smooth institutional/staff transitions

Success is a Conservancy that is considered an indispensable partner in solving complex problems in the Delta; that empowers staff to appropriately engage with the larger Delta community and successfully advance the goals of the organization; that cultivates an effective staff; and that secures sufficient funding in the near- and long-term to sustain staff and to meet program needs in order to achieve its organizational goals.

## Strategic Plan Timeline

