



Sacramento – San Joaquin Delta Conservancy

ORGANIZATIONAL ASSESSMENT

A summary report on assessment findings and
recommendations for improving organizational performance

February 2022

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Introduction

The Sacramento-San Joaquin Delta Conservancy (Conservancy) engaged Mission Consulting, LLC to perform a high-level organizational assessment to identify strengths and weaknesses and develop recommendations for improvement. The project was undertaken by the Conservancy in support of its 2017-2022 Strategic Plan Goal 3, Conservancy Organizational Strength and Sustainability, in which it commits to “cultivate a durable and effective organization via strategic collaboration, effective staffing and management, and long-term financial planning.” This report summarizes the findings and recommendations resulting from the assessment.

Overall, the assessment found that Conservancy staff believe the organization is achieving its mission to support efforts that advance environmental protection and the economic well-being of the Delta. However, the assessment also identified several opportunities for the Conservancy to improve, specifically in the areas of managing turnover, adding resources, financial stability, staff enablement, grant application processing, strategic communications, and leveraging information technology. We are confident these recommendations are both practical and achievable given the Conservancy’s complement of staff, recently added programs, and shared commitment to serve the public, and we look forward to tracking its future success.

Assessment Approach

Mission Consulting performed the organizational assessment during the second half of 2021. The scope of the assessment was broad, encompassing operations, activities, programs, communications, documents, duties, tools, and resources. As the assessment progressed and findings took shape, the project focused in on the areas of need reflected in this report. The project approach consisted of four tasks:

- **Initiation** – Kickoff meeting; initial interviews of executive team; orientation to the organization.
- **Assessment** – Review of documents and processes; organizational health survey; staff interviews.
- **Recommendations** – Develop and receive feedback on recommendations.
- **Report** – Deliver report summarizing key findings and recommendations.

All Conservancy staff were invited to participate in an anonymous 36-question survey, followed by one-on-one interviews to explore survey results and discuss opportunities for improvement. Interviews were also held with staff leaving the organization during the assessment period to ensure their perspectives were included. Mission Consulting also reviewed key activities, processes, and documents, to better understand Conservancy operations.

Findings and recommendations were developed and discussed with the Executive Team to confirm their accuracy and feasibility, respectively. This report reflects Mission Consulting's recommendations based on best practices and its experience working with other California state agencies. They are presented here for the consideration of the Conservancy, which can further weigh the costs and benefits of any changes in the context of its competing priorities and resource constraints.

Overview of the Conservancy

The Conservancy, which resides within the Natural Resources Agency, was established in 2010 by the State Legislature in recognition of the crisis resulting from unsustainable policies threatening the critically important Delta watershed. The Conservancy was created to serve as the primary state agency implementing ecosystem restoration in the Delta and supporting efforts that advance environmental protection and the economic well-being of Delta residents. The organization reports to an 11-member Delta Conservancy Board (Board), which is comprised of members representing the California State, local governments, and various stakeholders throughout the Sacramento–San Joaquin Delta Region (Delta). In this role, the Conservancy serves as a liaison between the State and Delta.

Currently, the primary ways the Conservancy serves the Delta include:

- **Grant administration** – Overseeing Proposition 1 (ecological restoration) and Proposition 68 (economic development) bond fund grants supporting Delta projects.
- **Special projects** – Managing several regional ecological and environmental projects, including the Delta Carbon Program, the development of regional restoration project tracking tools, and Fish Friendly Farming projects.
- **Collaboration** – Fostering and leveraging relationships and partnerships between public, private, and non-profit sector stakeholders within the Delta.

The Conservancy's annual operating budget in FY 2020-21 was \$2.15 million, funded by various state and federal sources. According to the Enacted Budget, 58 percent of the Conservancy's funding came from the General Fund, followed by 31 percent from Propositions 1 and 68 bond funds, 8 percent from the Environmental License Plate Fund, 2 percent from the Federal Trust Fund, and 1 percent from reimbursements.

The Conservancy currently has 14 permanent positions, four of which are vacant and being actively filled. These positions are divided between the Executive Team (2), Ecological and Community Programs Division (5), and Administration Division (7). The Executive Officer role is primarily outward-facing, and the Deputy Executive Director is responsible for day-to-day operations.

Since its inception, the Conservancy has successfully funded \$35.3 million for 26 grants focused on ecological restoration under the Proposition 1 program, which is now in its fifth and final cycle. In 2021, the Conservancy also began funding community and economic development projects as

part of a \$12 million Proposition 68 program. Through these programs and other efforts, the Conservancy has worked hard to become a valuable and trusted resource for its state and local stakeholders.

Findings & Recommendations

1. Staff share respect for each other and believe they have the right people and capabilities to achieve Conservancy priorities

Throughout the assessment, Conservancy staff described a work environment characterized by mutual respect among staff and a strong belief that the Conservancy had the right people and capabilities to achieve its priorities. They are interested in and proud of their work serving the Delta. Furthermore, staff believe the organization is achieving its mission to “support efforts that advance environmental protection and the economic well-being of Delta residents.”

This is an important source of strength for the Conservancy that, when combined with the Executive Team’s commitment to improve, should give the organization confidence in being able to improve other aspects of the organization. Positive staff dynamics are especially important for an organization as small as the Conservancy, as all 12 staff and 2 executive staff must establish trust, be flexible, and work collaboratively to be successful. While smaller organizations can benefit from being nimble and tightknit, they can also be less resilient and more sensitive to changes and staff relationships. This is evident in other aspects of the Conservancy, such as turnover (See Finding #2) and staff-executive team relations (See Finding #4).

Once fully staffed, it appears the Conservancy will be able to meet the demands of its current workload, not accounting for potential new work set for 2022. The lone exception is the Administration Division, which lacks sufficient resources at the management level to handle its existing workload. The Administration Supervisor position is classified as a Staff Services Manager I (Supervisory) and is responsible for administrative oversight of budgets, accounting, purchasing, contracts, grants, information technology, travel, facilities, communications, and human resources. The span of control for the breadth of program areas and quantity of work is beyond that which one position can effectively manage. This has placed undue strain the existing Administration Supervisor and required the Deputy Executive Officer to assume some of their workload, thereby impacting the Deputy’s capacity for executive-level duties.

Recommendations

1.1 Consider adding resources to support administration supervisory responsibilities –

The Conservancy should consider adding a Staff Services Manager II position to help handle the administration management workload. This will provide a high-level administration manager with capability to oversee the breadth of program areas,

assume some of the more challenging work themselves, and delegate responsibility for specific program areas to the Staff Services Manager I.

2. High staff turnover is negatively impacting operations

Over the past two years, the Conservancy has experienced the turnover of nearly 50 percent of its non-executive staff (7 of the 15 staff during the period). Records show six of the seven separated staff worked in the Programs Division and left for graduate school, to take lateral positions in larger organizations, or promotional jobs elsewhere. While this has occurred within the context of a nationwide increase in staff turnover, its significant impact on Conservancy remains noteworthy.

Such high turnover has negatively impacted the Conservancy in several ways. First, staff turnover has resulted in the loss of experience, making it difficult to build institutional knowledge and expertise. While the Executive Team has an average of tenure of 7.5 years, the average tenure of all other staff is only 1.7 years. Only one of those employees has more than three years' tenure. Four of these employees, including the Programs Division Manager, have been with the organization for approximately one year, and they were hired during the pandemic and have only worked remotely.

High turnover has also shifted more work onto remaining staff, particularly the two division managers who are ultimately responsible for ensuring work is completed. The added workload has made it difficult for staff to complete their regular activities and contributes to burnout and work delays. Facing four vacancies, the Conservancy recently released a letter to potential grant applicants letting them know that grant application activities would take longer than normal. High turnover has also increased the resources spent recruiting, onboarding, and training new staff. According to business studies, the total costs of staff replacement, including training and loss of productivity, can range from 90 percent to 200 percent of an employee's annual salary. The actual costs of replacement for the Conservancy are unknown.

According to staff interviews, one common reason for turnover is the lack of promotional opportunities and upward mobility within the organization. With only 14 permanent positions and the constraints associated with civil service, there are few chances for staff to promote within and grow their career. Case in point, during 2020-2021, there were no opportunities for staff to promote from within. The lack of promotional opportunity also makes it difficult for the Conservancy to recruit and attract talent. The other common reason for turnover cited by staff was strained relations with the Executive Team, a dynamic reflected in the survey responses of Programs Division staff.

Recommendations

2.1 Explore strategies to improve staff retention – While the Conservancy is constrained by its size, it may explore other strategies to improve employee retention, including:

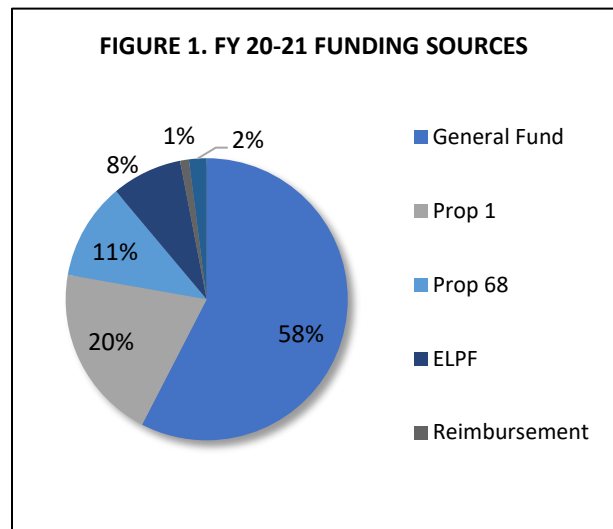
- *Offering what other jobs cannot in terms of exposure and training.* The relatively small size of the Conservancy allows it to provide staff with more varied and involved work experiences than many larger institutions. Studies show engaged staff that feel more connected to decisions and outcomes are less likely to leave their jobs. For example, given the geographical proximity of the Delta, there may be unique opportunities to meet grantees and visit project sites. In addition, there are opportunities for staff to take more training, to the benefit of both the employee and the organization. Records show the Conservancy makes funds available for professional development, but they have not been fully used.
- *Building stronger connections between staff and program outcomes.* Ultimately all Conservancy staff are supporting the programs and local projects that have real-world impact. The Conservancy should track, recognize, and celebrate these achievements, as well as ensure staff in all positions and levels feel responsibility for them. Currently, many Administration Division staff feel disconnected from Programs Division activities and the grant projects they support.
- *Continue supporting work-life balance.* According to staff, the Conservancy does a good job valuing and supporting work-life balance. As the organization returns to work post-pandemic, it should continue to ensure that telework policies and alternative schedules meet the needs of its current and prospective staff, within state guidelines.
- *Taking steps to create a better work environment.* Staff that departed during the assessment cited the work environment as a significant factor in leaving. This primarily concerned micromanagement and not feeling like they were allowed to do their jobs. (See Finding #4 and associated recommendations)

2.2 Build organizational resiliency to reduce the impact of turnover – High turnover and vacancy rates have had a significant negative impact on the Conservancy. While not entirely avoidable, the level of impact turnover has on the organization may be mitigated to a degree through cross-training staff and establishing policies and systems that capture best practices and institutional knowledge. This applies to everything from the process for reviewing grant applications (See Finding #5) to having a standard method of file organization so notes and documents can easily be found. (See Finding #6) These changes will minimize the disruption caused when experienced staff leave by providing staff with the information and guidance needed to quickly learn and contribute. Recently, the Conservancy has made significant advances in developing policies and procedures, as well as assigned back-up roles for every position – efforts that should help and be continued.

3. Reliance on proposition grant funding defines services and limits financial stability

The Conservancy’s enabling legislation grants it considerable discretion over how it supports ecological restoration and economic development in the Delta. In practice, however, the types and extent of work performed by the Conservancy is defined by its funding sources. In FY 2020-21, 58 percent of the Conservancy’s funding came from the General Fund, followed by 31 percent from Propositions 1 and 68 bond funds, 8 percent from the Environmental License Plate Fund, 2 percent from the Federal Trust Fund, and 1 percent from reimbursement. (See Figure 1)

As a result, the Conservancy’s primary function is grant administration. These activities include developing grant guidelines, soliciting and reviewing project proposals, making recommendations to the board, entering into grant agreements, and providing ongoing oversight and support to ensure grant funds are used properly and projects are successful. The focus on grants is also evident in its organizational structure, in which the Programs Division staff are organized by proposition grant program and administration staff support grant activities.



While the Proposition 1 and 68 grant programs are indispensable and valuable to the organization and the Delta, the Conservancy’s dependence on them effectively narrows the focus and impact of the organization. Without additional funding sources or increased allocation from the General Fund, the Conservancy lacks the resources to perform work beyond the bond programs that could support the Delta in the ways it was intended. Such activities include increased efforts on public education, seeking additional funding sources and partnerships to expand its impact, and exploring promising environmental projects like carbon sequestration and the potential for land management.

The Conservancy’s reliance on proposition bond funding also defines its financial stability. While the propositions provide critical funds for Delta projects, they have limited terms and the success of future propositions is unpredictable. This issue of bond funds and boom and bust cycles is not unique to the Conservancy, as it is the primary way the state funds its conservancies. For example, Proposition 1, the Conservancy’s largest program, is currently in its fifth and final grant cycle. Without access to new and diversified funding streams, the ability of the Conservancy to serve the Delta is in doubt. Upon the expiration of Proposition 1, Conservancy funds will temporarily carry on covering ongoing management and oversight before ending. Nevertheless, the lack of long-term stable funding concerns staff and has

required some positions to be limited term, making it more difficult for the Conservancy to recruit and retain staff. (See Finding #2)

The Conservancy recently received \$5.25 million from the General Fund for climate resilience, community access, and natural resource protection and received \$10 million from an interagency agreement with the Department of Water Resources to run a Delta drought response grant program. These programs provide much-needed relief in the short-term but are also limited in term and share some the same drawbacks of existing funding sources.

Recommendation

3.1 Commit resources to seek new and diversified funding sources, as possible – To increase financial stability and expand its impact on the Delta, the Conservancy should consider investing more resources in seeking additional funding sources. While General Fund resources are ideal and efforts should be continued, past attempts at budget change proposals have been unsuccessful. There are other grant opportunities that the Conservancy may want to explore, and it is recommended that it develop a strategy and devote resources to identify and apply for them. Due to its limited staff capacity, beyond the dedicated efforts of its Executive Officer, the Conservancy does not have a coordinated and committed effort to seek other funding sources, though it is recommended that it does in the future. Given the competitive nature of many grant funding opportunities and the Conservancy’s limited staff resources, it has been difficult for it to invest significant resources into applications that may or may not result in funding. It should be selective with its applications and perform the groundwork needed to connect with grantors and understand the viability of their application. The Conservancy may also consider adding temporary positions or engaging an outside grant writer to support this activity.

4. High expectations and micromanagement strain staff-management relations

To ensure compliance with requirements as well as earn the trust and respect of sometimes skeptical state and local stakeholders, the Conservancy holds itself to high standards for all communications, agreements, and other deliverables. This has served it well in many ways. However, the way this has been approached by the Conservancy has led to a resource intensive and prolonged quality control process that has impacted the workplace environment and organizational performance.

According to staff, unrealistic expectations and micromanagement by the Executive Team have led to staff frustration, disengagement, and diminished self-confidence and job satisfaction. Much of the Conservancy’s work product is reviewed by the Deputy Executive Officer, often leading to significant substantive and stylistic changes that create additional work and rewriting. Though staff acknowledge this process can help correct errors and improve quality, they feel the level of scrutiny is unnecessary at times and it makes them feel

they are not trusted to perform the work for which they were hired. Furthermore, this process can increase the time it takes for the Conservancy to complete work.

Our conversations about this with the Executive Team lend credence to their own challenges trying to delegate more responsibilities given the high stakes and variety of writing styles, experience, and levels of attention to detail among staff. A heightened level of review has often been needed in the absence of guidelines, processes, and procedures, as well as the newness of many staff, as described earlier in this report. In the past year, as systems and guidance have been further developed and staff experience and skillsets increased, the Executive Team has begun to delegate more responsibilities and assignments to enable Conservancy staff, especially at the division manager level. They have also met with staff to better understand and respond to their concerns.

Recommendations

4.1 Continue commitment to increased delegation and a culture of enablement –

Increased delegation will serve the dual benefits of empowering staff while shifting the burden off the Deputy Executive Officer. To facilitate this shift, we recommend the Executive Team and division managers collaborate to identify what needs to be in place for staff to succeed. Things that should be considered include: (1) assessing opportunities to further develop processes and resources to help direct work and ensure quality (See Recommendation #4.2); (2) deciding appropriate levels of review and feedback for different assignments and scenarios (See Recommendation #4.3); (3) identifying and skills gaps and devising a plan to address them through training and selective hiring; and (4) determining the right process and people to provide specific direction, as well as positive and constructive feedback.

4.2 Establish structures to help the organization perform its own quality control –

To the degree possible, the burden of quality control should be shifted from individuals to the organization via policies, processes, model language, and controls. The organizational commitment to these structures will be strongest if coming from the Executive Officer. The Conservancy already has a comprehensive writing style guide but has an opportunity to expand how it trains staff to think critically and understand the reasons behind what they are doing. In addition, the increased use of standard forms and templates, model language, and lessons learned can capture institutional knowledge while providing guidance and resources to help enforce a standard. Lastly, executive input and direction may be more appropriate early in the process rather than later, to help set outcomes, expectations, and direction. These strategies are particularly important now, given the short tenure of many of the Conservancy's staff.

4.3 Redefine quality management to account for context and risk –

The required quality of a work product can depend on various factors, including audience, risk, and use.

Quality management is not about perfection; rather, it is about achieving what is needed and neither falling short nor going beyond. In some instances, such as compliance, there may be clear requirements that must be met. In most other instances, success is more subjectively defined, and quality management requires an assessment. On a work product basis, the Conservancy would benefit from tailoring its standards and level of review to account for benefits and costs (e.g., time, strain) of additional review. Lower risk work should not require the same level of scrutiny, particularly if stylistic, and these tasks are often good candidates for delegation, allowing other staff to make decisions and experience on-the-job training. Likewise, lower priority changes to existing forms and standard language may be implemented on a regular six-month or annual cycle rather than continuously, to provide consistency and reduce the burden of constant change. At the same time, it is important that the Conservancy defines those instances and scenarios requiring a higher level of review or priority implementation.

5. Opportunities exist to improve the grant application process

The grant application process for Propositions 1 and 68 can take over a year from initial contact with an applicant to entering into a signed agreement. While the sequence of steps is slightly different between the propositions – Proposition 1 is competitive, and Proposition 68 is not – the core components of the process are largely the same: receive concept proposal, review for viability, proposal assessment, board consideration, and negotiate agreement. The most significant difference being the Conservancy can provide technical assistance to Proposition 68 applicants under certain circumstances to help them develop qualifying applications in advance of Board approval. Because the Proposition 1 application process is ending, the focus of this analysis is Proposition 68, though the lessons learned should apply to future grant programs.

Currently, the Conservancy can receive Proposition 68 grant applications at any time because there is no set grant cycle. The applications represent projects in the Delta that meet the criteria set forth in the grant guidelines, with a requirement that a percentage of the funds go toward projects benefiting Severely Disadvantage Communities. The projects can vary widely given the nature of the criteria and diversity of the region, so proposals often present the Conservancy with new questions. In addition, the grant-writing capability of the proposer can vary widely, resulting in proposals that need significant work before being ready for board consideration. Because this is inherently an iterative process that relies on applicant effort, capabilities, and partnerships, there are many variables outside of the Conservancy's control; however, there are opportunities for the Conservancy to improve the process. Though the Conservancy provides technical assistance, questions remain about what it should look like, who should perform it, and when it is obligated to provide it. Grant proposals are usually processed in the order in which they are received, but there is no set timeline for approval milestones. To date, there have been only a few approved grant applications, and they have

taken a long time to complete due to the iterative proposal process. Efforts to speed up this process will reduce the time required by Conservancy's limited staff while also decreasing project risk by taking advantage of stakeholder engagement, capacity, and quoted cost estimates, which are subject to change over time.

Recommendations

5.1 Increase use of technical assistance to provide applicants with needed resources –

The ability to provide technical assistance to support grant applicants gives the Conservancy another tool to assist the Delta, improve application quality, and, in SDAC instances, add outside resources to help applicants. Currently, this resource appears to be underutilized, as Conservancy continues to define and deliver on its vision and plan. Other examples of technical assistance provided by the state, such as that of the Strategic Growth Council, show that it can be a very proactive and involved service. This is a model the Conservancy should consider adopting. That said, when defining technical assistance, the Conservancy will also want to define the limits of its responsibility to help an applicant, so it does not feel obligated to assist all applications until they receive approval. For instance, such limits could be defined as a set number of hours or requirements that applicants are responsive and show progress by meeting defined milestones. At the time of this report, the Conservancy is actively recruiting for a retired annuitant AGPA to focus solely on providing technical assistance.

5.2 Consider alternative ways to engage applicants and shorten timeframes –

The current grant application process is very drawn out and requires considerable time and back-and-forth and iterations between the Conservancy and applicant. We recommend the Conservancy consider consolidating this process into a series of in-depth front-loaded workshops with the applicant. These meetings will allow for a detailed review with applicant, provide space for questions, explanations and problem-solving, and facilitate decision-making if the right people are present. An ideal output of the meetings will be clearly defined and assigned tasks, milestones, and open questions. If done correctly, the upfront investment in time will save time over the current process and should shorten the grant application timeline. In addition, the Conservancy may consider presenting this as a defined stage gate process that will help it communicate clearly with applicants what is required to proceed, the impacts of missing deadlines, and place limits on the resources spent with applicants that are not putting forth the effort and resources needed to present a viable project.

5.3 Improve efficiency by setting milestone and timeline targets and tracking progress

– Currently, the Conservancy lacks target dates for application milestones. This allows for the process to experience delays with little incentive or accountability otherwise.

The Conservancy should establish an ideal timeline for the different stages of an application and use it as the basis of a project schedule to drive and track progress. The schedule could be modified for a specific instance, but justification can be required, and it will be done intentionally and knowingly.

5.4 Provide grant applicants with project ideas based on best practices – Currently, the Conservancy looks to Delta communities to generate their own project ideas. While the grant guidelines provide criteria for selection, they do not provide many examples of ideal projects that have shown viability and good return on investment in similar situations. Providing such examples may help seed ideas for communities with fewer resources. Furthermore, reviewing applications for similar projects will likely make for lower risk and faster review and approval.

6. The Conservancy can better leverage its existing IT solutions

The Conservancy uses Microsoft Windows 10 and the Office suite of programs, with most of its work occurring in Word and Excel, with MS Teams being used for video conferencing. During the pandemic, remote staff have used a VPN to access files on a shared drive, though the Programs Division has recently created a SharePoint site for managing and sharing its files in the cloud. With few exceptions, the Conservancy does not take advantage of the full capabilities or programs of the Office suite that could help improve communication, collaboration, and information management.

According to staff, Conservancy files are not well organized, making finding documents and version control difficult. In the absence of a standard way for staff to save and manage their notes, tasks, and work, each have developed their own way. This undermines collaboration as well as the ability to document and manage institutional knowledge, which is particularly important in ensuring continuity in a high turnover environment.

Recommendations

6.1 Create an organization-wide file structure and policy for document management – This will allow the Conservancy to better manage its work and save staff time locating files and ensuring version control. This should be uniform across Programs and Administration Divisions. This need had already been recognized by the Conservancy, yet the organization has struggled to make resources available to plan and implement the required changes.

6.2 Use other MS Office suite programs to improve communication, collaboration, and tracking notes and tasks – The Conservancy is not taking full advantage of the programs it currently has. We recommend it use SharePoint or Teams to improve communication, collaboration, and file management. In addition, it should consider using OneNote, Planner/To Do, and Outlook to track and manage notes and tasks at a team and individual

level. Each of these programs is integrated, giving staff better access to information and the syncing of tasks.

Staff are interested and excited about these solutions, though many do not know how to use them or implement them. While research can help introduce staff to the various programs, once one is selected, managers and/or key staff should attend a training that is available to the state or via contract. Equipped with more knowledge, they can determine what approach would be best for their organization's needs and develop a plan for the rollout to the rest of the staff. We recommend that any training be done close to organization-wide implementation, so the skills can quickly be applied. For the transition to stick, managers must be committed to the change and lead by example. For instance, during meetings with staff, have OneNote open and shared with an agenda and take notes and assign tasks in real-time. In the future, instead of sharing copies of Word and Excel files with colleagues, send links to the Teams or SharePoint file location so others can collaborate and make edits in same document.

7. A matrix approach may improve engagement, collaboration, and operations

According to staff interviews, the Program and Administration Divisions can often be siloed from one another despite their mutual reliance. This dynamic expressed itself in various ways, including Program staff feeling hindered by administrative requirements and unclear processes, and Administration staff feeling disconnected from Program activities and projects. In the absence of organization-wide standards, the two divisions manage their files in different ways and many cross-division staff interactions and assignments are communicated via the Division managers.

7.1 Adopt a matrix approach to projects to increase team engagement and improve outcomes – A matrix organization uses cross-functional teams to accomplish its work. For example, the Conservancy would have a lead over Proposition 68 grants that oversees a team that consists of staff from the Program function (e.g., proposal review, technical assistance, ongoing oversight) and Administration function (e.g., strategic communications, budgeting, invoice processing, contract amendments). This team runs across the Program and Administration functions, which are managed by the Division functional managers who are primarily focused on ensuring their respective functions are defined, high performing, and supported. The goal of this model is to improve team collaboration and break down silos to ensure the right resources are focused on supporting operations and organizational objectives.

As the Conservancy explores this approach, we recommend that they start by using a weak matrix that does not require changes to their current organizational structure and focus on certain areas of immediate benefit. These areas may include:

- *Holding more cross-functional project kickoff and check-in meetings that bring key Program and Administration Division staff together* to plan and discuss an initiative's purpose, timeline, milestones, and roles and responsibilities. This will foster a team environment, help define expectations and needs, and improve project planning and management by providing a forum for all staff to participate in the process. It should be noted that the Conservancy has recently started to implement this recommendation.
- *Developing a strategic communications function that better supports Conservancy work.* Given the Conservancy's mission and role in the Delta, strategic communication plays an integral role in all its work, from grant administration and education to job recruitment and Board meetings. As such, this Administration Division function, should be treated as cross-functional, and the role of the lead should be to facilitate, plan, and execute communication strategies for each of the Conservancy's programs. This will shift the communications function from being one of controlling communication to that of maximizing the value of strategic communication in support of Conservancy objectives. This role will require working closely with the leads for those individual efforts to define communication needs, opportunities, and content, and efforts. The Conservancy has recently hired a new staff member to fulfill this role and should use this opportunity to redefine the role and the organizations' approach to communications.

Conclusion

The Conservancy is committed to improving its organizational strength and sustainability as it transitions from old to new programs and builds its staff and systems for the future. This organizational assessment was undertaken to ensure that all staff were heard and engaged in the effort to identify opportunities for improvement across the Conservancy's operations, activities, programs, communications, documents, duties, tools, and resources. The assessment found the Conservancy, overall, is achieving its mission despite its challenges as a small agency experiencing high turnover and relying on temporary bond funding. Nevertheless, these challenges have had an impact – placing significant strain on the organization and its staff, making it difficult to plan, mature its processes and systems, develop new competencies, and make other improvements that management acknowledges but lacks the time to implement. We believe the findings and recommendations in this report can help the Conservancy and its stakeholders better understand and respond to the opportunities and constraints it faces, as well as prioritize changes that can strengthen and improve the organization to the benefit of its staff and the Delta Region it proudly serves.