



Land Trust of Santa Cruz County Strategic Plan for FY 2010 through FY 2012 Adopted by the Board of Trustees June 12, 2009

Summary

The Land Trust of Santa Cruz County over the next three years will pursue five critical strategies.

1. **Take the leadership in developing and promoting a Conservation Blueprint for Santa Cruz County.** The Land Trust will develop and promote state-of-the-art science-based and community-supported countywide conservation vision to serve as a blueprint for a generation of conservation.
2. **Take the leadership in establishing a Countywide Open Space District.** The Land Trust will work with its partners to establish a publicly-funded Open Space District aimed at providing a steady stream of local conservation funding for a wide variety of conservation actions by non-profits and public agencies.
3. **Implement best practices stewardship on all lands under its care.** The Land Trust will greatly expand its capacity and skill in caring for the natural lands, working landscapes, and the conservation easement interests that it holds
4. **Protect critical lands through easements or purchase.** The Land Trust will work closely with willing landowners to purchase easements and land in the Santa Cruz Mountains, the Sandhills, and the farms, wetlands and foothills of the Pajaro Valley.
5. **Build staff and board capacity to deliver large-scale conservation.** The Land Trust will increase its conservation capacity – staffing, skills, systems, its ability to communicate, and most importantly, the ability of the staff and board to raise the funding needed to do large-scale conservation.

Mission and Vision

Mission The Land Trust of Santa Cruz County, in cooperation with public and private interests, protects and manages lands of significant natural resource, agricultural, cultural and open space value.

Vision We see a future where the wild and working forests, the beaches and coastline, the globally unique biotic habitats and the County's rich farming and ranching heritage – those things that define the extraordinary place we call Santa Cruz County – are preserved forever, are lovingly cared for by supportive communities and are cherished by all as an extraordinary gift that this generation has made to future generations.

Strategy #1: Take the leadership in developing and promoting a Conservation Blueprint for Santa Cruz County.

Long Term Goal: A community-supported and science-based Conservation Blueprint that helps identify conservation priorities in Santa Cruz County. The plan guides the work of the Land Trust and informs projects undertaken by public agencies and other conservation organizations and it provides the justification, documentation, and context for conservation funding in the County. The blueprint creates a common vocabulary and sense of purpose that fosters cooperation and collaboration between organizations.

3-year outcomes:

- Conservation Blueprint is completed (September 2010);
- The major conservation organizations and public agencies in the county have been engaged in development of the Conservation Blueprint and support its approach and findings;
- The rollout of the Conservation Blueprint has enhanced the reputation of the Land Trust among key constituencies, especially landowners.

Basic strategic approach: The Land Trust will take a leadership position in creating the Conservation Blueprint in the community. The process can be broken down into two phases:

- Phase 1 – science and planning. We will gather and compile information from a wide variety of sources about the natural resources and the threats to them.

- Phase 2 - community input. We will widely solicit community and partner input through a series of community workshops, an interactive website, and meetings with other conservation organizations, public agencies, and individuals.

Strategy #2: Take the leadership in establishing a Countywide Open Space District.

Long Term Goal: Take a leadership role in establishing an effective, broadly supported, amply and sustainably funded, Open Space District that will serve to:

- Protect natural lands, wildlife habitats, and water quality and supply;
- Preserve private, working lands including farm, ranch, and timber land;
- Steward protected lands, and develop and maintain trails;
- Create, enhance, and maintain neighborhood parks ; and
- Provide grants to local agencies and organizations to support local responses to climate change, water quality and supply improvement projects, agricultural awareness and environmental education.

3-year outcomes: Open Space District is established and companion funding measure passed.

Basic strategic approach: The Land Trust will take the lead in developing the measures and leading the campaign to get them on the ballot and passed by the voters, including:

- Work with elected officials and others to get state legislative approval for legislation that would give the County Board of Supervisors the authority to hold hearings and place measures on the ballot;
- Undertake an extensive outreach campaign, including current polling, to help shape a funding measure that can achieve two-thirds support;
- Work with others to build a "winning coalition" of support for the District and a funding measure;
- Play the lead role in securing funding for and managing the campaign.

Strategy #3: Implement best practices stewardship on all lands under our care.

Long Term Goal: The Land Trust has an earned reputation of providing quality stewardship and monitoring of all lands under its care. The Land Trust is known for its solid, science-based approach, utilizing best management practices across all of its holdings. The Land Trust demonstrates to the community sustainable models of

stewardship across a range of working landscapes. The Land Trust holds Land Trust Alliance (LTA) Accreditation

3-year outcomes:

Plans are completed and implementation started for:

- The stewardship obligations of all of the properties the Land Trust holds in fee;
- “Best practices” on working landscapes owned by the Land Trust;
- A comprehensive easement monitoring program with two years of monitoring completed;
- A body of Board policy addressing stewardship, easements, ownership, revenue generation, endowments and best practices;
- Revenue and funding for stewardship;
- Land Trust Alliance accreditation.

Basic strategic approach

Using the LTA Accreditation process for guidance, the Land Trust will start with the development of program plans that describe the general approach, staffing, timing and cost of the stewardship, easement monitoring and LTA compliance programs. From these program plans individual site plans will be developed that detail actions and funding for each site. Plans will be developed and long-term funding secured for all new easement or fee obligations of the Land Trust.

The Board will institute a body of new policies that address stewardship standards, best practices for timber and farming operations on Land Trust land, revenue generation from Land Trust lands, endowments and restricted funds for stewardship and policies regarding retention of ownership and transfers-out to other entities.

Strategy #4: Protect critical lands through easements or purchase.

Strategy #4.1 Protect the farmlands and wetlands of the Pajaro Valley.

Long Term Goal: The ecological and aesthetic values of the Pajaro Valley farmlands and wetlands are protected in a manner that supports the best interests of the community.

3-year outcomes:

- There is a detailed farmland protection plan;
- Double the area of the Watsonville Slough wetlands that are protected;
- Double the area of protected Ag lands to more than 3,000 acres.

Basic strategic approach: The Land Trust will develop a detailed protection plan for the area, tiered off of the Conservation Blueprint, delineating detailed priorities. The Land Trust will work with landowners to acquire easements or other protective interests in land. The Land Trust will, from time to time, support other organizations that are advocating policies to advance farmland protection in the Pajaro Valley.

Strategy #4.2 Protect the natural resources and working forests of the Santa Cruz Mt/Redwoods

Long Term Goal: Expand the protection of the Santa Cruz Mountains to protect the habitat, watershed and aquatic values of the area, provide ecological connectivity from the parks of the Big Basin region south, protect enough working timber lands to ensure viability of the Santa Cruz County timber industry, and complete partially protected landscapes (including working timber lands) in the areas of Nisene Marks and Corralitos.

3-year outcomes:

- A “partnership” with Save the Redwoods, Peninsula Open Space Trust, The Nature Conservancy, Semperviron Fund, the Land Trust and other organizations is in place and is effective;
- One pilot “partnership” project has been completed.

Basic strategic approach: The Land Trust will work with other conservation organizations and public agencies active in protecting the Santa Cruz Mountains to develop a formal or informal “partnership” that articulates how we will work together to achieve success. The Land Trust anticipates that it will influence the conservation outcome by bringing potential deals to various partners, using its relationships with major landowners and others, and its willingness to hold easements over working landscapes. The Land Trust will continue to maintain and cultivate relationships with major landowners and will actively promote the value of working timberlands in the overall protection strategy for this region.

Strategy #4.3 Protect the resource values of the Santa Cruz Sandhills

Long Term Goal: Expand the protection of the Santa Cruz Sandhills to encompass the areas delineated in the Conservation Blueprint and to ensure that there are sufficient buffer lands protected to support the long-term viability of these habitats.

3-year outcomes:

- Acquire adjacent properties to Geyer (120 acres);
- Stewardship plans in place, funded and being implemented (see Item 3).

Basic strategic approach: The Land Trust will provide Sandhills landowners with information on range of conservation options and opportunities. At the same time the Land Trust will work with the County government to develop a joint strategy for protecting areas and providing options to landowners. On an opportunistic basis the Land Trust will acquire easements, produce stewardship plans and provide management funds for stewardship of those easements.

Strategy #4.4 Establish landscape corridors and linkages in the oak woodlands/grasslands especially in the Pajaro Hills

Long Term Goal: Protect key areas of oak woodlands, grasslands and riparian corridors that are both intrinsically ecologically valuable and that also promote the long-term viability and resilience to climate change of the key protected areas of the county including the Pajaro Valley and the Santa Cruz Mountains.

3-year outcomes:

- Develop Conceptual Areas Protection Plans consistent with the Conservation Blueprint to support Wildlife Conservation Board funding;
- At least one major ranch in the Pajaro Hills is protected.

Basic strategic approach: The Land Trust will work with other conservation organizations to develop a strategy for the protection of these corridors. The Land Trust will use its relationships with major landowners and others to influence the conservation outcome. The Land Trust will continue to maintain and cultivate relationships with major landowners and will actively promote the value of working ranches and timberlands in the overall protection strategy for this region.

Strategy #5: Build staff and board capacity to deliver large-scale conservation

Strategy #5.1 Improve staffing, skills and systems

Staffing

Long Term Goal: The Land Trust has a stable core staff of experienced and skilled conservation practitioners that can execute the organization's plans successfully.

3-year outcomes:

- Key positions in stewardship and development are filled with excellent talent;
- Key staff are retained through the planning period;
- Use of volunteers and interns increases.

Basic strategic approach:

- **Rely heavily on contractors and consultants to ramp up and down.** The Land Trust will become expert at finding, negotiating with and managing Contractors and Consultants to fill short-term deficits in skills and manpower. This approach reduces core overhead, provides maximum flexibility to expand and contract with opportunities, and takes advantage of a uniquely talented pool of local experts.
- **Use Volunteers and Interns.** The Land Trust will increase its use of volunteers and interns. Office space will be increased and staff will be assigned to manage volunteers.
- **Expand the core staff.** The Land Trust will fill a currently vacant position, expand a half-time position to full-time, and add a part-time administrative support position. Given the added work load called for in the plan the following positions are essential:
 - Stewardship Manager – implements restoration, monitoring and stewardship plans, works with contractors to develop plans, coordinates stewardship volunteers;
 - Membership and Events Manager – Manages the Land Trust's membership program and organizes Land Trust events;
 - Administrative Support – A part-time position to provide administrative support.

Skills

Long Term Goal: The core staff of the Land Trust possesses the full range of skills needed to execute the plans of the program – land management, conservation planning, fundraising, community relations, land protection, and government relations – such that consultants and contractors “supplement” rather than “substitute” key staff skills.

3-year outcomes:

- Positions have been filled with experienced and appropriately skilled people;
- Skills training opportunities are routine and incorporated into staff evaluation processes.

Basic strategic approach: The current staff is skilled, experienced and dedicated. They encompass a wide range of expertise that is sufficient to successfully implement the plan. The proposed plan and the growing complexity of doing conservation work in California will necessitate a staff that is even more skilled, is current with all of the latest knowledge of the trade and is functioning at the top of their game. To ensure staff development is a priority a formal staff development program is proposed with the following elements:

- An individual Training and Development program is developed for each staff as part of the annual performance evaluation process;
- An annual budget item is identified to pay for this training, including learning opportunities such as LTA rally and other events.

Systems

Long Term Goal: The systems that support the work of the Land Trust promote efficiency, reduce frustration, and enhance the professionalism of the organization.

3-year outcomes:

- Office space is expanded and adequate;
- Phone systems have been replaced to provide flexibility for expansion and off-site work stations;
- Computer systems are up to date, adequate, reliable and compatible;
- Management level staff have access to budgets that they understand and that guide their work;
- Skills training opportunities are routine and incorporated into staff evaluation processes.

Basic strategic approach:

- Expand office space to accommodate expanded staff and volunteers;
- Engage consultants to address phone and computing needs, including shared drives, backup, and mobility;
- Increase the sophistication of budgeting systems to budget at the departmental and project levels;
- Incorporate procedures to address lobbying, IRS cap, and FPPC reporting;
- Develop rolling cash flow projections on a monthly, annual, and multi-year basis.

Strategy #5.2 Communicate better

Long Term Goal: The Land Trust is regarded by the community as the go-to source for land conservation information in the County. Members are engaged and motivated to action by the communications from the Land Trust. Donors are inspired to support the organization at increasing levels.

3-year outcomes:

- A communications strategy is in place and operational;
- Newsletters and updates are sent out regularly.

- The website is kept up-to-date and e-updates are regularly sent to a list of at least 1,000 supporters.

Basic strategic approach

Using the Conservation Blueprint and polling work for the Open Space District as a platform, improve the core messaging for membership, newsletter, web and leave-behind materials. Leverage increase in administrative and development capacity to increase staff time devoted to communications.

Strategy #5.3 Raise more money and increase the engagement of the Board in this effort

Long Term Goal: Fundraising is an integrated and effective capacity of the Land Trust, uniting staff, board and community leaders in a common cause.

3-year outcomes:

- \$3 million is raised over the next three years to support the implementation of the strategic plan;
- Board fundraising capacity is increased and board giving goals are established and met;
- A well staffed board/community leader committee is established and raising money;
- New fundraising approaches are in the early implementation phase, such as planned giving;
- Board diversity and fundraising capacity issues are identified and rectified.

Basic strategic approach

Fundraising, while always challenging, will be even more so for the duration of this plan. The downturn in the economy has reduced charitable giving generally, the budget crisis in government at all levels has reduced funding from that source, and the strategies outlined in this plan require increased spending to be successfully implemented. The plan proposes several approaches to address these challenges:

- Create a Development Department, and strengthen the department by adding additional capacity;
- Reinforce the role of the board as fundraisers, including setting a board fundraising target and establishing a fundraising committee of board/community leaders;
- Increase board diversity according to a board “best practices” plan;
- Consider targeting new board members based on fundraising capacity;
- Consider a planned giving program.

Strategy # 5.4 Monitor the plan's progress and update it

Long Term Goal: The Land Trust derives focus and empowerment from an up-to-date and relevant Strategic Plan. The plan facilitates program evaluation and revision.

3-year outcomes:

- On a quarterly basis the plan and budget are reviewed, evaluated and revised by the leadership of the Land Trust and the Board.
- If the Open Space district is deemed no-go in July 2010, the plan is reviewed and revised.

Basic strategic approach:

The plan will be used as the standard against which performance is measured. Managers will self-evaluate against the plan, supervisors will use the plan to evaluate staff and program performance, and the Board will use the plan to evaluate the Executive Director, evaluate the Program, and self-evaluate.

Each quarter staff will report to the Executive Director on progress toward achieving the 3 year goals and performance against budget. The Executive Director, in turn, will report on these items to the Board. Each quarter the Board and the Executive Director will develop revisions to the plan and budget and report these changes to the staff.

At the end of FY 2011 the Land Trust will decide to either carry forward the existing strategic plan or to initiate a new planning process.