

Ventura Hillsides Conservancy



STRATEGIC PLAN

2010 – 2014

Ventura Hillsides Conservancy
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INTRODUCTION

The Ventura Hillside Conservancy is a seven year old land trust that is maturing quickly. Since its inception in 2003, it has successfully acquired three properties, expanded its membership base to over 600 annual contributors, established a very effective annual fundraiser in the form of the Hillside Music Festival, and earned a place at the table in the land zoning and management discussions in the region. It has also successfully transitioned from a Founders Board to new leadership, invested in the growth of a three-person professional staff, and dramatically enhanced awareness of the value of open space and conservation in the Ventura community.

Cognizant of its accomplishments over the past six years and ever aware of the importance of securing open space and conservation lands for the benefit of current and future generations, the Ventura Hillside Conservancy is planning for a dramatic increase in its ability to advance its mission while continuing to build the organizational capacity needed to sustainably manage lands and funding.

In 2010, the Board of Directors convened a Strategic Planning effort, facilitated by Aligning Visions, to review the opportunities going forward and take deliberate steps to enhance the capacity of the organization to meet the needs of the local community. This document summarizes the five-year vision, goals, steps, and actions that the Ventura Hillside Conservancy will take to preserve the hillsides, canyons, waters, and open space that contribute to the unique character and natural environment in the Ventura region.

CURRENT ENVIRONMENT

The Ventura region is rich with beautiful hillsides, two large coastal rivers, a critical estuary that serves as the gateway to the Channel Islands, and the Mediterranean landscape that defines the high quality of life that entices residents and visitors to the California Central Coast.

Over the past few decades that quality of life has been compromised by ongoing urban development along the river that has slowly cut off public access, private property delineations that have fenced off the hillsides, and a multi-lane highway that separates the town from the beach. The Ventura Hillsides Conservancy has emerged as a response from many members of the local community to ensure that this situation can be reversed, guaranteeing greater public stewardship and recreational access to these iconic landscapes that define the Ventura community.

The Ventura Hillsides Conservancy identifies the following major trends as critical to its ability to effectively position itself for growth and sustainability in support of its mission:

- There is an abundance of opportunities within the Conservancy’s interest area to protect and restore hillsides, riparian areas, and expand public access to open space and recreational areas. In response, the steady growth of the Conservancy’s capacity and its solid credibility has now enabled it to consider larger efforts in acquisition, stewardship, and community engagement.
- Today’s youth have less exposure to nature than in prior generations, but when given the opportunity to experience natural areas in the region, their enthusiasm and volunteerism have been sparked.
- The current economy has created a greater focus on job creation within the community coupled with behavioral changes founded on a greater awareness of sustainable lifestyles including more bike riding, less use of plastic, and a greater appreciation for local and organic agriculture. These trends support the ecological sustainability principles that the Conservancy promotes.
- Tourism will remain a bedrock economic driver of our community. Increasing the ability of visitors to rent bikes, hike local trails, access scenic view points, and learn more about the area ecology is part of a new wave of “place-based” tourism that relies on sharing the unique attributes of our central coast landscape, seascape, and lifestyle.

- Philanthropy grows as organizations prove their ability to effectively manage lands and funds. Ventura Hillside Conservancy has earned the trust of its donors and members, allowing for the opportunity to look into larger more ambitious programs and land acquisitions.
- There is a profound love of place that exists in the Ventura region as evidenced by a strong Board, ever-expanding group of high-level advisors, members, and event participants. This high level of commitment to the Ventura region will create ongoing opportunities for recruiting new Directors and supporters to the Ventura Hillside Conservancy.

The Ventura Hillside Conservancy has effectively laid the building blocks for an extremely successful land trust in the Ventura region. The Conservancy looks forward to advancing this 5-year strategic plan and becoming ever more successful at meeting the aspirations of our children, our neighbors, and our community in reclaiming public access to the beautiful outdoor landscape that inspires us daily.

OUR MISSION

The Mission of the Ventura Hillside Conservancy is to "preserve the hillsides, canyons, and open space that contributes to the unique character and natural environment of the City of San Buenaventura and the surrounding region for the benefit of present and future generations."

OUR CORE VALUES

The work of the Ventura Hillside Conservancy is inspired by the passion of the directors and members to ensure that present and future generations are able to view, steward, and recreate in the hillsides, waters, and canyons of this beautiful region. We pursue this passion mindful of three core values:

- **INTEGRITY:** We work with integrity to ensure our long term credibility and to merit our members' and donors' trust.
- **EDUCATE:** We educate the public on the values of open space, ecological health, and biodiversity for the sustainability and long-term prosperity of our region.
- **COLLABORATE:** We work collaboratively with organizations, community members and public institutions to secure our mission.

OUR GOALS, STEPS AND ACTIONS

This 5-year Strategic Plan covers the period of June 2010 through December 2014. Our long-term vision directs our 5-year goals which include strategic steps and key actions that will drive our success.

OUR 5 YEAR VISION

The Ventura Hillside Conservancy will sustainably expand our operations to secure a high visibility land holding which, along with our smaller land holdings, will provide opportunities for public education, recreation and stewardship while enhancing the long-term ecological values of our region.

GOAL 1: ACQUIRE A HIGH VISIBILITY PROPERTY FOR QUALITY PUBLIC RECREATIONAL ACCESS WHILE CONTINUING TO ACQUIRE PARCELS THAT CONTRIBUTE TO THE ECOLOGICAL HEALTH OF THE REGION.

STEP 1.1 Identify priority parcels and manage respectful outreach and communications with landowners to find willing sellers of land, easements, or management opportunities.

Action 1.1.1 Complete Initial Project Evaluations on priority parcels. 2011-2014.

Action 1.1.2 Maintain at least yearly correspondence with key landowners. 2010-2014.

STEP 1.2 Ensure effective due diligence is completed on all properties that are in negotiation, following standards set by the Land Trust Alliance.

Action 1.2.1 Assess land value through appropriate review and comparison sales, and external assessors. 2010-2014

Action 1.2.2 Assess legal aspects of property including title, easements, mineral rights, water rights, restrictions, zoning, permitting and other aspects as dictated by the Board. 2010-2014

Action 1.2.3 Establish the minimum required annual cost of maintenance and an optimal level of annual property management that includes public access, restoration and maintenance. (See Action Step 4.....). Incorporate at least the minimal cost in acquisition negotiations and fundraising plans. 2010-2014

Action 1.2.4 Set a clear scope and parameters for negotiating with owners and government entities to ensure the effective long-term management of these sites. 2010-2014

STEP 1.3 Negotiate with willing sellers of land, easements, and management opportunities to secure fee title on a highly visible property that can provide a high-quality public access experience.

Action 1.3.1 Negotiate with landowners in good faith for high priority parcels, securing fee title on key parcels for the benefit of our region. 2010-2014

Action 1.3.2 Develop effective processes for acquiring easements and entering into land management agreements (MOUs), with priorities and risk management steps clearly delineated when these approaches are of greater interest to landowners. 2010-2014.

GOAL 2: ESTABLISH AN ENDOWMENT FUND AND ACCESS TO PUBLIC FUNDING MECHANISMS THAT WILL ENSURE THE EFFECTIVE ACQUISITION AND LONG-TERM STEWARDSHIP OF VENTURA HILLSIDES CONSERVANCY PROPERTIES.

STEP 2.1 Establish a minimum and optimum level of annual funding needed for the management of each Ventura Hillside Conservancy property as part of the Project Evaluation process (Step 1.2)

Action 2.1.1 Minimum level calculation process will be set by the Board but should include insurance, filing, required signage, and needed stewardship interventions to maintain conservation quality. Optimal level calculation process will also be set by the Board and will include public access, trail construction, interpretive signage, and higher levels of restoration. 2010

STEP 2.2 Develop a Capital Campaign for acquisitions and stewardship funds

Action 2.2.1 Develop a Scope of Work for an experienced Capital Campaign Consultant. 2011

Action 2.2.2 Select a consultant who can work closely with at least 1 member of the Board on tasks such as developing an appropriate major donor list, visiting prospects, developing materials, organizing 'naming' opportunities, and planning the quiet and public phases of the campaign. 2011

Action 2.2.3 Launch campaign around having an option or the acquisition of the first signature land holding.

Action 2.2.4 Establish endowment for ongoing property management with raised funds as well as a separate account for acquisitions.

STEP 2.3 Develop capacity to manage mitigation banking for the Ventura Hillside Conservancy priority properties with the California Department of Fish and Game, the Army Corps of Engineers, and the Regional Water Quality Control Board and others that do mitigation for damages and permitting in lieu of fee.

Action 2.3.1 Educate the Board on Mitigation Banks and opportunities for applying funds to restoration, stewardship and acquisition. 2010

Action 2.3.2 Ensure all permitting agencies know that the Ventura Hillside Conservancy holds properties and is ready to appropriately use mitigation funds. 2010

Action 2.3.3 Apply mitigation funds on Ventura Hillside Conservancy properties and due diligence for prospect properties, and manage the appropriate programmatic and financial reporting. 2011-2014.

Action 2.3.4 Identify a skilled volunteer who can actively search for mitigation funds via County wide EIR reviews and proactively help drive mitigation dollars towards VHC. 2012

STEP 2.4 Build awareness of Ventura Hillside Conservancy acquisition goals and priorities with key state government funding agencies.

Action 2.4.1 Complete the Conservation Area Protection Plan for the Ventura Hillside Conservancy region of interest as a prerequisite for showing funding bodies the ecological importance of targeted parcels. 2010

Action 2.4.2 Advance meetings with the Coastal Conservancy and the Wildlife Conservation Board to better understand their priorities, schedule, funding cycle, capacity and interest. 2010

Action 2.4.3 Submit first proposals to the Coastal Conservancy and the Wildlife Conservation Board for priority acquisitions and management. 2011.

Action 2.4.4 Manage grants, complete grant objectives, and report regularly to build Ventura Hillside Conservancy's capacity and credibility for future funding. 2012-2014.

STEP 2.5 Expand outreach to private foundations for grant giving related to acquisitions and management.

Action 2.5.1 Actively investigate and apply for grants for property acquisition and stewardship responsibilities tied to major land acquisition. 2010 -2014

STEP 2.6 Expand Planned Giving outreach

Action 2.6.1 Planned Giving materials will be reviewed and updated. 2011
Action 2.6.2 An education outreach event or materials will be prepared for local attorneys focusing on estate planners. 2011

Action 2.6.3 A database will be established with all people who have checked interest in bequests. 2011

Action 2.6.4 All Ventura Hillside Conservancy materials will be reviewed for possible inclusion of planned giving promotions. 2012

Action 2.6.5 Follow up means of recognizing and thanking known requesters will be developed. 2012

STEP 2.7 Secure contracts for management and stewardship services on lands and waters that are high priority for the Ventura Hillside Conservancy.

Action 2.7.1 Actively investigate and secure contracts for stewardship and management contracts on our own and other high priority lands and waters that we would otherwise have to fundraise for. 2010 -2014 (Step 3.6)

STEP 2.8 Review political will for public funding options

Action 2.8.1 Actively approach the City of Ventura and the County governments to explore potential partnerships and public funding opportunities such as parcel taxes, sales tax, transit occupancy taxes, partnerships with Parks and Recreation and other long-term funding that would go to support the public access and maintenance of Ventura Hillside Conservancy properties. 2012-2014

GOAL #3 DIVERSIFY FUNDING SO THAT NO MORE THAN 25% OF OPERATING FUNDS FOR THE VENTURA HILLSIDES CONSERVANCY COMES FROM ANY ONE SOURCE.

STEP 3.1 Continue to offer the Hillside Music Festival to generate consistent (budgeted) unrestricted income annually given the huge success and following of the event.

Action 3.1.1 Build on the success of the Festival to continue increasing memberships and understanding of the work of the Ventura Hillside Organization through sales, announcements, sponsorships and marketing. 2010-2014

- Action 3.1.2 Document the process of managing the Music Festival to increase the ability to effectively attract more volunteers to manage the event and plan for long-term efficiencies. 2011
- STEP 3.2 Offer fundraising and educational events that will ensure memberships cover approximately 25% of annual operating funds.**
- Action 3.2.1 Build on the initial success of the Hillside Film Festival as a membership drive every spring. 2011-2014
- Action 3.2.1 Partner with other organizations for fundraisers such as the Turkey Trot to raise awareness of the need for open space. 2010-2014
- Action 3.2.2 Manage volunteer-driven educational fun events such as the Hills on Wheels to enhance the membership program. 2011-2014
- Action 3.2.4 Manage an annual appeal to all members and build greater opportunities for member pricing linked to specific benefits and acknowledgements. 2011-2014
- Action 3.2.5 Expedite membership renewal program and manage a yearly phone bank to thank members and request renewals. 2011-2014
- STEP 3.3 Launch a capital campaign and major donor program (Step 2.2) that will increase funding for operations and stewardship.**
- STEP 3.4 Raise over 20% of operating funds in capacity building and program funds from private foundations and government grants.**
- Action 3.4.1 Investigate and apply for grants for organizational capacity building and operations tied to the growth of the organization and increased land conservation. 2010 -2014
- STEP 3.5 Expand Planned Giving outreach (Step 2.6)**
- STEP 3.6 Raise over 15% of operating funds through contracts for management and stewardship services tied to the mission of the Ventura Hillside Conservancy.**
- Action 3.6.1 Actively investigate and secure contracts for stewardship and management contracts that build our organizational capacity and are directly tied to our high priority lands and waters. 2010 -2014 (Step 2.7).

GOAL #4 COMPLETE MANAGEMENT PLANS ON ALL PROPERTIES AND PROVIDE EFFECTIVE STEWARDSHIP OF OUR LANDS IN COMPLIANCE WITH LAND TRUST ALLIANCE STANDARDS

STEP 4.1 Develop site management plans for all lands owned by the Ventura Hillside Conservancy to ensure that visual resources, access and recreation, ecological resources, cultural resources, and public safety are appropriately managed.

Action 4.1.2 Provide public access to Ventura Hillside Conservancy preserves and recreation opportunities that are compatible with the protection of sensitive biological and cultural resources.

STEP 4.2 Collaborate with public and private organizations and property owners for the purpose of natural resource restoration or enhancement.

Action 4.2.1 Contract to undertake landscape construction, revegetation, invasives control, improved hydrological function, and provision of amenities for public access to and education about natural resources. (Step 3.6) 2011

Action 4.2.2 Apply mitigation funds to priority parcels for landscape construction, invasives control, revegetation, improved hydrological function, and provision of amenities for public access to and education about natural resources. (Step 2.3) 2011

STEP 4.3 Support the Restoration of the Lower Ventura River in partnership public and private organizations.

Action 4.3.1 Lead and advocate for the implementation of the Vision Plan for the Lower Ventura River Parkway and be major partners in efforts to ensure greater stewardship, public access, and hydrological function of this impacted waterway. 2012

GOAL #5

ENSURE THE LONG TERM SUSTAINABILITY OF THE VENTURA HILLSIDES CONSERVANCY BY STRENGTHENING THE BOARD, COMMITTEE STRUCTURE, AND VOLUNTEER OPPORTUNITIES.

STEP 5.1 Organize permanent committees and expand participation to more high level volunteers to enhance Board recruitment opportunities over the next five years. 2010-2014

- Action 5.1.1 Establish six permanent committees:
1. Governance Committee
 2. Land Committee
 3. Stewardship Committee
 4. Education Committee
 5. Fundraising Committee
 6. Finance Committee
- Add an audit committee by 2013.
- Action 5.1.2 Establish ad hoc committees solely when there is a key function for a defined period of time.
- Action 5.1.3 Require all Trustees to actively engage in at least one committee. 2010-2014
- Action 5.1.4 Recruit committee chairs and vice-chairs with an eye towards new leadership and succession planning. 2010-2014
- Action 5.1.5 Invite each committee (except Governance) to include non-Board members to groom prospective Trustees and/or attract needed expertise. 2010-2014
- Action 5.1.6 Develop a Board consent agenda for committee reports distributed with Board packets prior to meetings. Present only key policy recommendations for discussion at the Board meetings. 2010-2014

STEP 5.2 Establish Board documents and meeting minutes on a secure web site.

- Action 5.2.1 Join Boardnetwork.org (or other such facility) to ensure that Board members can find all key Ventura Hillside Conservancy documents in a secure online location. 2011
- Action 5.2.2 Put key legal documents, bylaws and other important governance items on this site. 2011
- Action 5.2.3 Have upcoming meetings and links to agendas and reading materials on the site. 2011

STEP 5.3 Continue to build our cadre of advisors and high-level volunteers that play such a major role in advancing our programs and fundraising events. 2010-2014

- Action 5.3.1 Ask all advisors to work on a subcommittee or Committee, and raise opportunities for at least three Advisors to move into key roles such as Committee and Subcommittee chairmanships.
- Action 5.3.2 Actively review Advisor performance and consider advisors for Board positions.
- Step 5.4 Recruit at least 2 additional Board members per year with new skills and peers to continue the transition from a founding Board to a diverse Board deeply rooted in our values and the aspirations of the citizens of Ventura. 2010 - 2014**
- Action 5.4.1 Recruit Board members from Advisory group (Step 5.3)
- Action 5.4.2 Recruit members from our Donors (Step 2.2)