

**Tri-Valley Conservancy**  
**Strategic Plan**  
**2008 – 2011**  
(Adopted April 10, 2008)

**MISSION STATEMENT**

To permanently protect the fertile soils, rangelands, open space and biological resources and to support a viable agricultural economy in the Tri Valley area.

**VISION**

Preservation of agricultural lands and natural open spaces in our area is vital to protecting our quality of life. The Tri-Valley Conservancy will be a leader in the permanent preservation of the area's rural and ecological environment. We envision a future that includes:

1. Population growth and development matched by a strong agricultural industry and a strong conservation ethic.
2. Sustainable communities. We recognize the need to protect land and to support a viable agricultural economy to provide food, recreation, and watershed for the long-term health and viability of our community.
3. Ecological Health. We are committed to the permanent protection of lands that are critical to the health of the environment.

TVC will foster the creation and maintenance of a productive and balanced environment for current and future generations of Tri-Valley area residents.

## ***RETREAT OVERVIEW***

The board and staff of the Tri-Valley Conservancy met on January 16<sup>th</sup> in Livermore, CA to discuss issues critical to the long-term direction of the organization. The retreat was the first in a series of discussions that lead to the development of an updated strategic plan document.

The retreat began with a review of current strategic, conservation, and fundraising plans. From this initial review, the group focused through several discussions geared at identifying the key changes and organizational challenges facing the Conservancy in the next couple of years. The board also looked at how it might change to address more effectively its role in supporting the evolving organization. Fundraising and how to best structure that responsibility was a key facet of that discussion.

Participants in the retreat included board members Rik Hansen, Michael Princevalle, Miriam Miller, Mark Eaton, Jim Perry, Bill Thomson, Mary Roberts and Jean King. Staff participants included Sharon Burnham and Laura Mercier, and included participation for part of the day by Consultant Donna Fletcher. The retreat was facilitated by Marc Smiley, an organizational consultant with experience working with the Conservancy.

## ***EXPECTATIONS OF PARTICIPATION***

*Participants identified what they hoped to get out of their participation in the retreat and the overall planning process.*

- Gain fundraising perspective
- Get excited about fundraising
- Clarify our vision of the future
- Understand how we are going to expand
- Better understand each other
- Gain a better understanding of what is expected of board members
- Implement the conservation plan
- Move more people onto the Board of Directors
- Pull together as an organization
- Consider how to do outreach on our conservation easements
- Extend organizational reach
- Raise money to support the plan
- Grow agency support for what we do
- Identify willing sellers and work with them
- Build the membership base
- Ask for more \$1,000 gifts
- Extend people's reach into the community

**CRITICAL ISSUE – MEETING THE CHALLENGE OF A REGIONAL ORGANIZATION**

***Working Regionally***

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**Mitigation Process**

The mitigation process emerging from the East Alameda County Conservation Strategy could have an important role for the Conservancy

- Participate in the policy and planning process for the EACC Strategy
- Could have a possible role in the implementation

**Competition Among Groups**

- Must be able to collaborate with other groups – take advantage of relative strengths
  - Other groups include Resource Conservation Districts, Agriculture and Natural Resources Trust of Contra Costa County (ANRT), Save Mt. Diablo,
- We have a unique role to play
  - Most effective at easements and long-term stewardship role
  - Need to make our program successful – not spotty
- Work with a “live and let live” philosophy. No need to compete for projects.

**Conservation Plan**

- We have defined a pro-active element in our plan. We need to meet that challenge.
- We will continue to respond to opportunities as they emerge.

***Growing Our Capacity***

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**Fundraising Stability**

Several key elements were identified in the fundraising plan to support our overall fundraising effectiveness. These items will be integrated into the work plans and budget for the Conservancy

- Advertising – including a brochure and a broader advertising strategy
- Direct mail – especially important to acquire new members
- Major donor program – targeted outreach and support for larger individual gifts

## **Board Development**

Growing the board to reflect the larger geographic reach and growing professionalism of the organization is needed.

- Need to be able to serve the entire region. This means adding board members in other parts of the county where the Conservancy is working.
  - Identify the needs within the organization that board members can fill, in addition to the regional representation.
- The Trustee Model may be a way to expand involvement. It recruits a group of “trustees” (or other specifically named group) who have no fiduciary responsibility but who have a willingness and ability to contribute to the financial health of the organization (in some way)
  - Pool of potential trustees may be limited. Not sure how many potential candidates there are for trustees.
- Organization needs to overcome the challenges it has with its fundraising program, which include:
  - Continuing discomfort with permanent easements among some
  - Perception that the organization has more than adequate resources
  - Too many people who just don’t give to conservation organizations
  - Strong competition among various nonprofit groups

### ***Key Decisions from Discussion***

1. Expand board, with at least one geographic recruit added. Overall growth of the board would include:
  - Geographic representation
  - People willing to develop relationships
  - People willing to directly engage in fundraising tasks
2. Add three board members (within 12 months)
  - Start with one (3-4 months)
  - Communicate with other recruits immediately
  - Continue to add as we are able
3. Add trustees as part of the board recruiting process

**SUPPORTING THE BOARD'S ROLE IN FUNDRAISING AND BOARD DEVELOPMENT**

*The group talked through some of the elements of the board's role in fundraising, brainstorming a partial list of activities that board members could undertake to help raise funds. The board members then identified the activities that they would be willing to undertake.*

***Board fundraising functions***

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- Give a gift
- Invite to TVC functions
- Promotional lunches and tours
- Placing materials where we go/reception areas
- Speaking at community meetings, especially homeowner associations
- Create list of potential supporters
- Set appointments for others
- Go ask for gifts
- Thank you notes/cards – especially if personal
- Thank you calls
- Attend donor training
- Internalize the message – develop a personal story
- Brief and de-brief with other board members
- Host a public booth/Farmer's market
- Talk about the Conservancy at community events

***Board development activities***

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- Make a list of potential people
- Solicit help in materials
- Make call – (interview) about involvement
- Contact past board members
- Thank/recognize current volunteers
- Host thank you events
- Talk to organizations including Seniors in Retirement (SIRS)
- Take individuals to lunch to cultivate leaders (after board development process)
- Develop a screening process for candidates