



Integrated Sierra Investment Strategy (ISIS)

Charrette Summary No. 1

Introduction

On April 24 and 25, 2003 The Sierra Fund convened a special policy “charrette” in Nevada City, California to discuss an Integrated Sierra Investment Strategy (ISIS) to better organize and increase public investment to conserve and protect the natural resources of the Sierra Nevada. Charrette attendees included some of California’s most knowledgeable conservation advocates, resource agency managers, legislative staff, and policy experts (a roster of participants is attached).

Charrette Key Question

How can agencies and non-governmental organizations best organize and increase public investment in the natural resources of the Sierra Nevada?

Charrette Ancillary Questions:

- What program and process criteria would measure a significant, successful integrated investment strategy in the Sierra Nevada?
- What are the barriers to, and opportunities for, improving public conservation investment in the Sierra Nevada?
- How should funds already earmarked for the Sierra Nevada be used to serve the long-term goal of increasing conservation investment in the Sierra Nevada?
- How can the efforts of public agencies and non-profits be organized to best deliver conservation services to the Sierra Nevada?

Summary of the Solution:

Increasing and better organizing conservation investment in the Sierra Nevada requires coordination among four broad action areas:

1. Enlisting state agencies and political leaders as conservation partners;
2. Developing a statewide constituency to support a Sierra Nevada conservation agenda;
3. Focusing on Sierra Nevada conservation projects that solve real problems and leverage funding and partnerships; and
4. Improving the capacity of Sierra Nevada NGOs involved in conservation projects.

I. Key Elements of the Solution

A summary of recommendations that emerged from the ISIS Charrette are summarized below. Each summary includes a few bullets on important next steps or strategic considerations. These are summaries only: a more detailed description of the charrette discussions follow in the remainder of this memo.

1. Enlist state leaders as conservation partners. Sierra-based and statewide conservation advocates can assist state institutions that are active partners in an Integrated Sierra Investment Strategy. It is important that leadership efforts and successes are well publicized to give credit to project “champions” and increase the political cachet of Sierra Nevada conservation projects.

Next Steps:

- Encourage the Governor to launch a “Sierra Initiative” that could include:
 - √ Request for a Department of Finance analysis of current Sierra-eligible resource investments in Propositions 12, 13, 40 and 50;
 - √ Creation of an inter-agency Sierra Nevada “Task Force” with Resource Agency departments and Cal-EPA;
 - √ Promotion of a high-profile “landmark” project that builds cachet for Sierra Nevada conservation;
 - √ Coordinated hearings by state agencies and departments within the Sierra Nevada region to assess the effectiveness of state programs; and
 - √ Protecting key resource program budgets.
- Encourage new “Sierra Champions” in the legislature who could:
 - √ Hold joint Senate and Assembly hearings on the state of the Sierra Nevada natural resources and state agencies’ role in protecting and managing them. These hearings could use the 10th anniversary of the Sierra Nevada Ecosystem Project (SNEP) to examine progress and identify remaining challenges;
 - √ Identify and promote high profile “legacy” projects in the Sierra; and
 - √ Advocate for language in existing and new resource bond legislation that dedicates or supports conservation investments in the Sierra Nevada.

2. Build the statewide constituency for conservation. Develop statewide public and political interest in, and support for, a Sierra Nevada conservation agenda built around simple themes and clearly articulated challenges. Explore options for “branding” the Sierra Nevada with a single regional identity that appeals to both Sierran communities and urban voters throughout the state.

Next Steps:

- Commission regional and statewide opinion research to measure public concerns and awareness of Sierra Nevada issues and potential support for various conservation strategies.
- Solicit competitive proposals for a Sierra Nevada “branding” campaign, with creative use of messages, materials and messengers for statewide and targeted constituencies.
- Develop a statewide public education campaign targeting key constituencies and voting blocs.
- Convene a charrette-style discussion with Los Angeles-based interests, opinion leaders and policy experts.

3. Promote attractive projects that solve real problems. Sierra Nevada conservation projects must solve carefully defined problems confronting the region and the state. It is desirable that these projects address multiple problems for a variety of partners and leverage funding from multiple sources. Successes should be publicized to establish a track record of success in order to generate support for continued conservation investments.

Next Steps:

- Identify high-profile “legacy” projects that exemplify the needs of the Sierra Nevada and attract political and popular support from throughout the state for additional conservation.
- Identify and promote projects that meet local needs and provide local economic opportunities. Match projects with appropriate implementers.
- Package proposals that leverage funding and appeal to multiple partners and funders, including federal, state, and local public agencies, and private investors.

4. Build capacity of Sierra Nevada NGO’s involved in conservation. The existing local and regional conservation groups that serve the Sierra Nevada must strengthen their individual and collective internal administrative and fundraising capacities in order to be stronger partners with the state and federal agencies. In order to give these groups time to develop capacity, the \$30 million dedicated in Proposition 50 should not be spent in first grant cycle. NGO’s should work on bundling proposals into fewer, more comprehensive projects that solve a range of problems.

Next Steps:

- Provide technical assistance to local conservation organizations in preparing and submitting project proposals. Identify new competitive funding sources for which Sierra Nevada conservation projects are eligible.
- Pursue creative partnerships with authoritative organizations such as MWD and EBMUD.
- Convene a policy conference and/or issue special reports highlighting Sierra conservation issues.
- Enlist a strategic partner to provide capacity-building and strategic training to local and regional Sierra-based NGO’s involved in conservation.

II. Background Discussion

The process used to develop these recommendations to the ISIS Charrette Key Question included discussion of a number of ancillary question and answer sessions. The results of these sessions of the discussion are summarized below.

Introduction: What are we working to protect?

The Sierra Nevada has always inspired the human imagination and powered the human spirit. Today, its resources fuel one of the most productive economies on Earth. This rugged, 400-mile-long mountain range is home to the forests, lakes and rivers that produce more than 60 percent of California's water supply. The Sierra Nevada features the tallest mountains in the nation outside of Alaska and boasts the singular beauty of Lake Tahoe and Yosemite Valley, as well as eight national forests, three national parks, and numerous state parks and wilderness areas.

And yet the grandeur of the Sierra Nevada is greater than the physical sum of its parks, peaks, forests, wildlands and waterways. For the Sierra Nevada inhabits the imagination and heart of California. For many, the Sierra was the scene of their fishing trip, first campfire, or first snow-ball fight. For millions more - ranchers, loggers, farmers and recreation business owners - this landscape is their home and livelihood. It is "la Sierra" in the Latino culture, a mythic place of reflection, peace and play. However one defines the Sierra Nevada, one thing is certain: the future of all Californians is bound to its fate.

1. What would successful integrated strategy for Sierra conservation look like?

Protecting the Sierra Nevada will require multiple strategies and decades of work by multiple partners funded by larger public and private investments. There are both "program" and "process" issues to consider in designing and initiating an integrated conservation strategy for the Sierra Nevada.

A single, regional identity for the Sierra Nevada would help focus public awareness and support for conservation efforts. From there, the problems of the Sierra must be clearly and consistently identified and conservation projects must be packaged as practical solutions to those problems. When possible, these project-based solutions should address multiple problems.

Although the Sierra faces many problems requiring complex solutions, these problems and solutions must be clearly and consistently defined in the simplest terms possible. Bundling projects into easy-to-understand, yet comprehensive, solutions would help promote public understanding and support and make them more attractive to funders. NGO proponents should explore whether funds can be used for conservation planning. Finally, projects must be consistent with funders' and legal criteria.

Solutions and investments should be coordinated to affect an integrated set of targets. Project proponents should learn from the example of the Resources Agency, Wildlife Conservation Board and Cal-EPA, who in recent years have begun to target their programs to a series of interconnected issues in the Sierra including:

- Acquisition of riparian areas to improve connectivity
- Fire safety, including fuels management
- Forest restoration - anticipating climate change
- Planning for hydro power re licensing in the region
- Ranch lands / working landscapes
- Identifying appropriate land uses
- Population growth in foothills
- Riparian restoration
- Economic sustainability

2. What are the barriers confronting a successful conservation strategy?

For the most part, the public's identification with the Sierra Nevada, and their willingness to support conservation efforts in the region, have not translated into Legislative willingness to act. This is partly due to the region's conservative electorate and elected officials, who place low value on environmental issues and fear impacts of environmental protection on resource extraction industries, jobs and local tax rolls. The lack of a "unified identity" in the region reduces the ability to collaborate on large-scale projects across the whole landscape.

Another barrier is the "invisibility" of the Sierra's problems to urban residents. From the perspective of the average urbanite, the Sierra Nevada "looks green" and doesn't appear in need of protection. Urban and statewide public support for protection of the Sierra needs to be carefully measured and understood.

Fortunately, over the last decade a series of activities such as the Sierra Summit and Sierra Now conference have produced valuable ideas on addressing Sierran issues. An opportunity exists to revisit these ideas and identify progress made, opportunities for action, and crises needing immediate action. One result could be a "Report Card" on the Sierra Nevada.

State and federal resource management agencies generally lack a Sierra-wide institutional infrastructure. Most resource-based government programs have divided the region into distinct management units, some of which reach into areas well outside of the Sierra region. In addition, there is no consensus or coordinated vision among the "non governmental organizations" for Sierra conservation.

Finally, participants acknowledged that there is no defining image of the Sierra. Unlike the coast, or Tahoe, there has been no "branding" of this region by icon, image or slogan. This makes it hard for the average Californian to grasp the size, span or even general location of this huge mountain range much less the complex conservation issues confronting it.

3. What opportunities exist for a more coordinated conservation strategy?

There is a great deal of interest and new money available to solve the problems confronting the Sierra. Informed and focused by twenty years of research and advocacy efforts, these funds bring the potential for great progress. In addition to the \$30 million "earmarked" for the Sierra in Proposition 50, there are funds at the State Water Resources Control Board for clean water and integrated regional water management projects, and new funds at the Department of Water Resources for river parkway protection under Propositions 49 and 50. Additionally, there are funds available through federal agencies as well as regional government and utility districts such as the East Bay Municipal Utility District and the Metropolitan Water District.

The California Legislature is now creating "implementing" language for recently-passed statewide bonds, and discussions have begun around the next round of resource bonds. The Sierra Nevada needs to be explicitly identified as a priority in these bond discussions wherever and whenever possible, and criteria or language should be added that improves the Sierra's ability to compete for these funds. Strategically, the case needs to be made that the Sierra is a good area for investment, but the attitude and argument that the area hasn't received its "fair share" of conservation money should be avoided.

In the public arena there are a growing number of public relations firms with experience in environmental and conservation campaigns. Their expertise could play a crucial role in building public support for more conservation efforts in the Sierra.

4. How should investments be targeted to maximize success in the Sierra?

In order to generate excitement around the Sierra Nevada, proponents should identify one or more high-profile "legacy" projects that highlight the opportunities for conservation in the Sierra Nevada and underscore the need for more public conservation investment in the region. In order to take advantage of the money now available, projects that meet the criteria for success discussed elsewhere in this memo need to be identified, bundled into ready-to-go packages, and moved on a fast track to a set of integrated funders. Legislative and policy "champions" must be identified. The funds from these projects can be used as the "glue" to coordinate state agency activities in the region. These successes need to be publicized to illustrate the impact of investment and the opportunities and needs still outstanding.

Not all of the Proposition 50 funds currently dedicated to the Sierra Nevada should be used in the first round of grants. At least half of the funds should be retained for a second round of grants. These could be used to help raise matching funds in a "challenge grant" process that solicits private donors.

The Legislative leadership should be enlisted immediately. The Governor, President Pro Tem of the Senate, and the Assembly Speaker could each be approached to adopt a "signature" or "legacy" project within the Sierra Nevada. Major philanthropists and foundations should be approached as funding partners in these "signature" projects to fund the elements not appropriate for public dollars.

The Governor could play a special role in helping to shape a Sierra Initiative. For example, a significant "landmark" project that requires state sponsorship could be brought forward for gubernatorial support. Using this "landmark" project as an example, the Governor could issue an Executive Order that calls for the following activities (potentially as part of the implementation of Propositions 40 and 50 bond investment programs):

- Request the Department of Finance to identify current expenditures on resource conservation in the Sierra Nevada;
- Create a Sierra Nevada Task Force between Resources and Cal-EPA;
- Convene regional hearings by consolidated agencies and departments to seek input on the state's role in protecting the Sierra; and
- A report to the Legislature summarizing what is learned throughout these efforts.

5. What role can the non-profit community play in shaping these investments?

The ISIS Charrette provided an invaluable forum for dialogue between key decision makers on how to improve conservation in the Sierra Nevada. Although NGO community was not the primary focus of the charrette, non-profits involved in Sierra Nevada conservation can benefit from the charrette discussions outcomes. A future charrette will gather input from non-profits and focus on the appropriate roles for non-profits in implementing recommendations from both events.

The ISIS charrette produced a variety of recommendations and discussion points for non-profits to consider:

- 1) The Sierra conservation agenda could benefit from a central coordinator (variously described as a clearinghouse, facilitator, packager and presenter) of conservation projects - individual and collective - in the Sierra Nevada.
- 2) More effort should be made to identify organizations with projects that are appropriate for state, federal or private support and work with donors and organizations to create projects that are "ripe for funding."
- 3) NGOs should partner with state and federal agencies in holding workshops to help Sierra-based groups assemble coordinated grant applications to multiple donors.
- 4) There is an opportunity for a Sierra policy conference to draw together Sierra based conservation groups, statewide organizations and businesses, and elected leaders to talk about the current "State of the Sierra." This conference would measure the impact of the last decade of activity, using as a starting point the original "Sierra Now" conference held in 1992. It would also help develop common agendas and messages among Sierra advocates for implementing real change in the Sierra.
- 5) There is a need to measure and build public support for more investment in Sierra conservation. This would include public opinion polling and focus group interviews; the development of paid and earned media campaigns, and related legislative strategies.

One crucial element of this effort would be "branding" the Sierra with a single, unifying, regional image that marks a place in the hearts and minds of the California electorate. Sierra advocates could solicit competitive proposals from public relations and advertising firms for a "unified image campaign" for the Sierra Nevada. The image or images created during this competition could be used on license plates, t-shirts, calendars or political literature.

- 6) Sierra-based NGOs need an advocate in Sacramento to ensure that any implementing language for existing bonds is favorable to the Sierra. New bonds under consideration should be targeted to include language that explicitly dedicates funds to the Sierra Nevada region. Key resource program budgets need to be defended.
- 7) Sierra-based groups all benefit from new philanthropic interest and private conservation investment to the region. Groups could begin sponsoring "field trips" with potential donors to show the more hidden wonders of the region and help win new dollars for conservation efforts, building a financial endowment that makes significant investments in conservation organizations and initiatives in perpetuity.

***The Sierra Fund gratefully acknowledges the generosity of Mr. Michael Funk
for the use of his home for this event.***

ISIS Charrette Participants

April 24 - 25, 2003

Mary Nichols, California Secretary of Resources
Art Baggett, Chair, State Water Resources Control Board
Phil Isenberg, Hyde, Miller, Owen and Trost
Leslie Freidman-Johnson, Conservation Strategy Group
Mary Shallenberger, Office of Senator Pro Tem John Burton
Jim Gaither, Resources Law Group
Daryl Young, Dept of Conservation
David Bunn, Dept. of Fish & Game
Elaine Berghausen, Resources Agency
Dennis Machida, Tahoe Conservancy
Greg Greenwood, Resources Agency
Mike Monasmith, Resources Agency
Shawn Garvey, The Sierra Fund
Michael Funk, The Sierra Fund
Elizabeth "Izzy" Martin, The Sierra Fund (facilitator)
John Regan, The Sierra Fund (facilitator)



***The Sierra Fund partners with private donors and public
agencies to increase and organize resources in the
land, air, water and human resources of the Sierra Nevada.***

The Sierra Fund
409 Spring Street
Nevada City, CA 95959
(530)265-8454
www.SierraFund.org