



To: Steering Committee for the
Strategic Review of the California Council of Land Trusts

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Potrero Group

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Re: Memo of Key Takeaways and Next Steps from the
Strategic Review of the California Council of Land Trusts

In October 2019, the California Council of Land Trusts (CCLT) engaged Potrero Group to support a strategic review of the organization. The Board recognized that CCLT needed to assess its current situation and its surrounding environment as part of a process to develop strategic choices for the future. At the most basic level, CCLT needed to ask fundamental questions such as:

- Who is CCLT?
- Is CCLT still needed? If so, why?
- Is CCLT's current business model working?

During this process, Potrero Group presented the Steering Committee with the following reports to inform this discussion:

- Critical Needs of California Land Trusts
- Current Services and State of CCLT
- Contextual Landscape in which CCLT Operates
- Themes and Key Lessons from Comparable Organizations
- Potential Opportunities for Collaboration with Partner Organizations
- *Draft* Findings, Recommendations and Next Steps

In order to engage the CCLT land trusts in the discussion, CCLT distributed to Executive Directors of CCLT member land trusts the ten-page *Executive Summary: Strategic Review of the California Council of Land Trusts* (Exhibit 1) and hosted a virtual *Strategic Review* (Exhibit 2) presentation on March 23. Potrero Group then facilitated four small-group virtual sessions to gather additional input on the strategic review and two small-group virtual sessions to understand the immediate needs and opportunities for CCLT to support the member community during the COVID-19 crisis (Exhibit 3).

The strategic review process has incorporated feedback from nearly 50 individuals. Many represented California land trusts. Others represented non-member land trusts,

conservation organizations and coalitions, comparable associations in other states, potential partner organizations and funders. We appreciate the willingness of each of these individuals to participate. We are particularly grateful for the significant investment of time of the CCLT staff and Board to guide and respond to our process. We look forward to your thoughts on the following key takeaways and next steps.

Key Takeaways

- (1) CCLT is needed to strengthen the ability of a vibrant and diverse community of land trusts across California to advance land conservation and stewardship and to participate meaningfully and collectively in solving major societal and environmental problems.
- (2) California land trusts need from CCLT: visionary leadership, policy and advocacy representation (including for funding), knowledge-exchange, training support and community building. As recent weeks have shown, the relative importance of each will change across time, and individual land trusts will value these needs differently.
- (3) As a membership organization, membership benefits must exceed membership costs. CCLT must change the perception of many members that, recently, the costs have exceeded the benefits. CCLT can begin to do so immediately with effective communications and a series of virtual meetings for members focused on policy and advocacy, knowledge-sharing and community-building.
- (4) Effectively responding to the needs of the diverse range of land trusts across California is not easy. It requires effective governance, highly capable staff and a sustainable business model with sufficient funding. Funders expressed a willingness to support the transition to a sustainable business model.

Recommended Next Steps

- A. Leveraging the current acute need for CCLT's leadership, knowledge-sharing and convening role, CCLT should deliver (and publicize) value-added services in a consistent and accessible manner for the next quarter. These services could include:
 - (i) virtual knowledge-sharing meetings based on member requests,
 - (ii) regular and valuable informational bulletins and updates,
 - (iii) individual calls with each CCLT member organization at least once a quarter, and
 - (iv) preparatory discussions on policy and advocacy for when the California legislature reconvenes.

- B. Building upon the strategic review, CCLT should develop (and validate with members and funders) a clear three-year business plan that identifies:
 - (i) an updated vision and mission,
 - (ii) a clear and brief description of its strengths, weaknesses, opportunities and threats,
 - (iii) strategic goals (already drafted),
 - (iv) tactics with quantifiable milestones for each goal,
 - (v) resource requirements, and
 - (vi) a business model supported by financial projections and funding requirements.

- C. CCLT should ask junior and senior staff members (as well as Board representatives) from land trusts that have been underrepresented to take on leadership roles within CCLT. These leadership roles could range from coordinating regional or thematic interest groups, to facilitating knowledge-sharing and best practices through virtual sessions, to participating in the Steering Committee and/or Board.

- D. CCLT should improve communications and messaging with and between CCLT members and other stakeholders. Immediate opportunities may include improving the content and clarity of the website, offering a centralized shared resource repository and hosting a platform for online communications between members around relevant topics.

- E. CCLT should meet with the Land Trust Alliance to develop a coordinated plan for providing (and securing funding for) leadership and organizational training for California land trusts.

Exhibits (Supporting Documents)

- Exhibit 1: Executive Summary: Strategic Review of the California Council of Land Trusts

- Exhibit 2: Strategic Review Presentation Given at March 23 Virtual Summit

- Exhibit 3: Summary of Small-Group Strategic Review and Community Support Sessions