



Strategic Plan Update Highlights from the September Public Workshop

Objective

The highlights from the September Public Workshop (workshop) will support further discussion on the Conservancy’s key policy drivers and roles, guiding principles, focus areas, and other strategic planning concepts. Conservancy staff along with Crowe LLP will build on the considerations summarized on the following pages to support the development of the Conservancy’s updated strategic plan.

Background

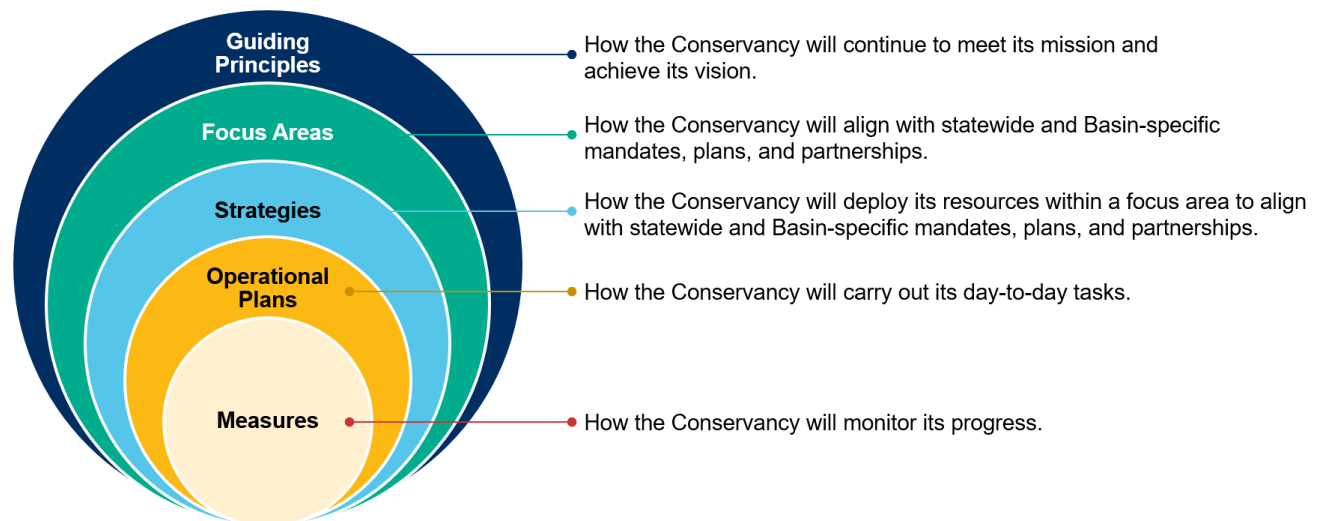
The Conservancy is updating its 2018-2023 strategic plan to support its direction through 2029. For reference, in **Attachment 1**, we provide a snapshot of the Conservancy’s 2024-2029 Strategic Plan Development Process.

In August 2023, Jason Vasques, Executive Director, along with Wendy Pratt and Tommy Abeyta, Crowe LLP¹ (Crowe), met with Board members (or alternates) to highlight the Conservancy’s accomplishments under the current strategic plan, and to gather their initial perspectives on guiding principles and focus areas for the Conservancy’s updated strategic plan. Board member’s initial perspectives on guiding principles and focus areas supported further discussion between Board members, Staff, Partners, and the Public at the workshop.

In September 2023, Conservancy staff along with Crowe facilitated a workshop attended by Board members, Conservancy staff, Partners, and others to kick-off the strategic planning development process. Conservancy staff first presented updates on key programs and projects to provide information on potential key policy drivers and roles. Crowe then led an exercise-based session with a focus on listening and learning from others to accomplish the following:

- *Reflect* on the Conservancy’s key policy drivers and roles
- *Rethink* the Conservancy’s guiding principles
- *Reaffirm* the Conservancy’s focus areas.

Proposed 2024-2029 Strategic Plan Concepts²



¹ In July 2023, the Conservancy contracted with Crowe to support the development of its updated strategic plan.

² Operational Plans are internal documents that will be developed and managed by Conservancy staff to operationalize the updated strategic plan.

Key Policy Drivers & Roles

Key policy drivers at the state and regional levels often inform the Conservancy's roles and responsibilities. Reflecting on key policy drivers at the onset of the strategic planning process allows the Conservancy to identify and account for its emerging challenges and opportunities along with its current mandates, plans, and priorities before proceeding on to the development of other components of its updated strategic plan.

The first exercise and discussion at the workshop focused on *reflecting* on the Conservancy's key policy drivers and roles. Crowe first asked attendees to identify and consider the Conservancy's key policy drivers at the state and regional levels. Crowe then asked attendees to identify and consider the Conservancy's roles within each key policy driver. Crowe then asked attendees to share their reflections with the group. Below are questions Crowe asked attendees to obtain input on the Conservancy's key policy drivers and roles:

- *What are the Conservancy's current and emerging key policy drivers (i.e., statewide initiatives and policies, and regional priorities and plans)?*
- *What should the Conservancy's role be within these key policy drivers?*
 - *Examples of roles included: Lead, Implement, Support, Fund, Inform, and Others?*

Highlights

Attendees offered an array of perspectives on the Conservancy's key policy drivers both at the state and regional levels. In **Attachment 2**, we provide the complete list of individual perspectives gathered at the workshop. For discussion purposes, Crowe synthesized the perspectives on the Conservancy's *current* and *emerging* key policy drivers and roles into the following themes based on common responses:

- Lead, Implement, and Fund Climate Adaption and Resiliency Programs and Projects within the Basin
- Improve Outdoor Access for All through Various Roles
- Support Active Transportation and Mobility
- Lead, Implement, and Fund Basin Restoration Efforts, including Forest and Watershed Restoration Programs and Projects
- Lead Wildfire Prevention, Policy, and Education efforts throughout the Basin
- Support Livable, Resilient, and Affordable Communities within the Basin
- Lead, Implement, and Support Statewide and Regional Regulatory Plans, Alignment, and Streamlining Efforts
- Convene and Cultivate Strong Partnerships with State, Regional, and Tribal Partners
- Inform State and Regional Partners and the Public on the Conservancy's Progress, including its Successes

Considerations

Below are key insights resulting from the exercise and discussion on key policy drivers and roles at the workshop for the Conservancy to consider as it moves forward with the strategic planning process:

- How to distinguish, clarify, and prioritize what the Conservancy's key policy drivers are (and are not).
- How to clarify and communicate the Conservancy's roles and responsibilities to its State and Regional Partners and the Public.
- How to integrate climate adaptation and resiliency throughout the Conservancy's updated strategic plan.
- How to carry out current responsibilities while adapting to changing conditions.
- How to improve Outdoor Access for All, including recreation options for local residents and visitors.
- How to continue to coordinate and build trust with Partners, the Washoe Tribe, Local Communities, and the Public.
- How to integrate housing and transportation within the Conservancy's updated strategic plan.

Guiding Principles

Guiding principles reflect how the Conservancy will continue to meet its mission and achieve its vision. Guiding principles are fundamental beliefs, values, or “north stars” of the Conservancy. Guiding principles are typically “we will” statements that are short, simple, and easy to understand by all.

The second discussion at the workshop focused on *rethinking* the Conservancy’s guiding principles. At the workshop, Crowe presented a set of proposed guiding principles, shown in **Attachment 2**, based on Board members’ initial perspectives along with initial feedback from the Conservancy’s Review Workgroup. Crowe then asked attendees the following questions to guide the discussion on *rethinking* the Conservancy’s guiding principles:

- *Do you believe the proposed guiding principles accurately align with the Conservancy’s mission? Why or why not?*
- *Are there any proposed guiding principles that you believe could have unintended consequences or conflicts with other principles? Why or why not?*
- *Are there any additional guiding principles you would suggest to enhance the Conservancy’s alignment with its mission?*

Highlights

Attendees that shared their thoughts on the Conservancy’s guiding principles generally agreed with the direction of the proposed options. Some attendees offered feedback on the language and sentiment of some of the options. Overall, attendees’ reactions to the proposed options were positive, and the feedback provided at the workshop offered the Conservancy and Crowe additional guidance on potential areas of refinement. For discussion purposes, Crowe synthesized attendees’ feedback on the proposed guiding principles below:

- Attendees generally agreed the five (5) proposed guiding principle categories aligned well with the Conservancy’s mission and vision, but could be further refined in terms of tone and aspiration.
- Several attendees shared that the term “maintain” does not adequately reflect a principle that guides the Conservancy, but rather reflects an action or activity the Conservancy already performs (e.g., the proposed guiding principle category on “maintaining the Basin for future generations”).
- Attendees generally agreed that collaboration and partnerships, particularly with the Conservancy’s Regional partners and the Washoe Tribe, should be highlighted and elevated within the list of proposed guiding principles.
- Attendees generally agreed that the equity-focused guiding principles showed progress in terms of the Conservancy’s commitment to racial equity and environmental justice.

Considerations

Below are key insights resulting from the discussion on guiding principles at the workshop for the Conservancy to consider as it moves forward with the strategic planning process:

- How to incorporate other terms, such as “preserve,” “enhance,” or “adapt” in place of “maintain” when refining the proposed guiding principles.
- How to incorporate and elevate a guiding principle focused on “collaboration” and “connection” with the Conservancy’s Regional Partners and the Washoe Tribe.
- How to communicate the Conservancy’s role(s) as a steward of public resources (both natural and fiscal resources) within the proposed guiding principles.
- How the proposed guiding principles support and align with the Conservancy’s proposed focus areas.
- How to refine the list of proposed guiding principles down to six (6) options, based on feedback from the Review Workgroup.

Focus Areas

Focus areas reflect how the Conservancy will align with statewide and Basin-specific mandates, plans, and partnerships. Focus areas are key pillars that will anchor the Conservancy's direction and inform its goals through 2029.

The third exercise and discussion at the workshop focused on *reaffirming* the Conservancy's proposed focus areas – Stewardship, Protection, Restoration, Public Access and Recreation, and People. Crowe first asked attendees to share what each focus area meant to them. Crowe then asked attendees to consider and then map the key policy drivers identified during the first exercise to a specific focus area. Crowe then asked attendees to share their reflections with the group. Below are questions Crowe asked attendees to obtain input on the Conservancy's proposed focus areas:

- *What do these focus areas mean to you?*
 - *Stewardship*
 - *Protection*
 - *Restoration*
 - *Public Access and Recreation*
 - *People*
- *How do the key policy drivers you identified earlier fit within these focus areas?*

Highlights

Attendees generally agreed that Stewardship, Protection, Restoration, Public Access and Recreation, and People reflect the Conservancy's focus areas with some exceptions. In **Attachment 4**, we provide the complete list of individual perspectives gathered at the workshop in response to the question "what do these focus areas mean to you?" For discussion purposes, Crowe synthesized the attendees' feedback on these proposed focus areas:

- Attendees generally agreed that Stewardship, Protection, Restoration, Public Access and Recreation, and People provided an appropriate framework to build on to support the development of the Conservancy's updated strategic plan.
- Many attendees saw and expressed an overlap and synergy between these focus areas (especially Stewardship, Protection, Restoration).
- Some attendees thought "People" as a focus area was not clear enough (i.e., what does "People" refer to?), but generally understood the intention of creating an "anchor" focused on developing the Conservancy's focus on its external Partners at the State and Regional Levels and internal Divisions, Teams, and Groups.
- The overwhelming connection to the People focus area was "Community," which was also a common theme resulting from the exercise on the Conservancy's key policy drivers.

Considerations

Below are key insights resulting from the exercise and discussion on focus areas at the workshop for the Conservancy to consider as it moves forward with the strategic planning process:

- How to confirm stewardship, protection, restoration, public access, and people are the "right" focus areas to build on to support the development of the Conservancy's updated strategic plan.
- How to distinguish the focus areas (especially stewardship, protection, and restoration) through goal and strategy planning.
- How to potentially reimagine the People focus area to reflect and incorporate a focus on "community" and "partnerships".

Moving Forward

The workshop provided an opportunity for Board members, Conservancy staff, Partners, and the Public to listen and learn from one another. The reflections shared at the workshop provide invaluable insights to build on and will support further discussion and planning efforts by Conservancy staff and Crowe.

For continuity purposes, Crowe added Board member’s initial perspectives and considerations related to each proposed focus area. The considerations noted below reflect common drivers raised by Board members during our initial interviews and reflect many of the considerations discussed at the workshop. These considerations noted below along with the considerations resulting from the workshop provide discussion items to move forward with to support the development of the Conservancy’s updated strategic plan.

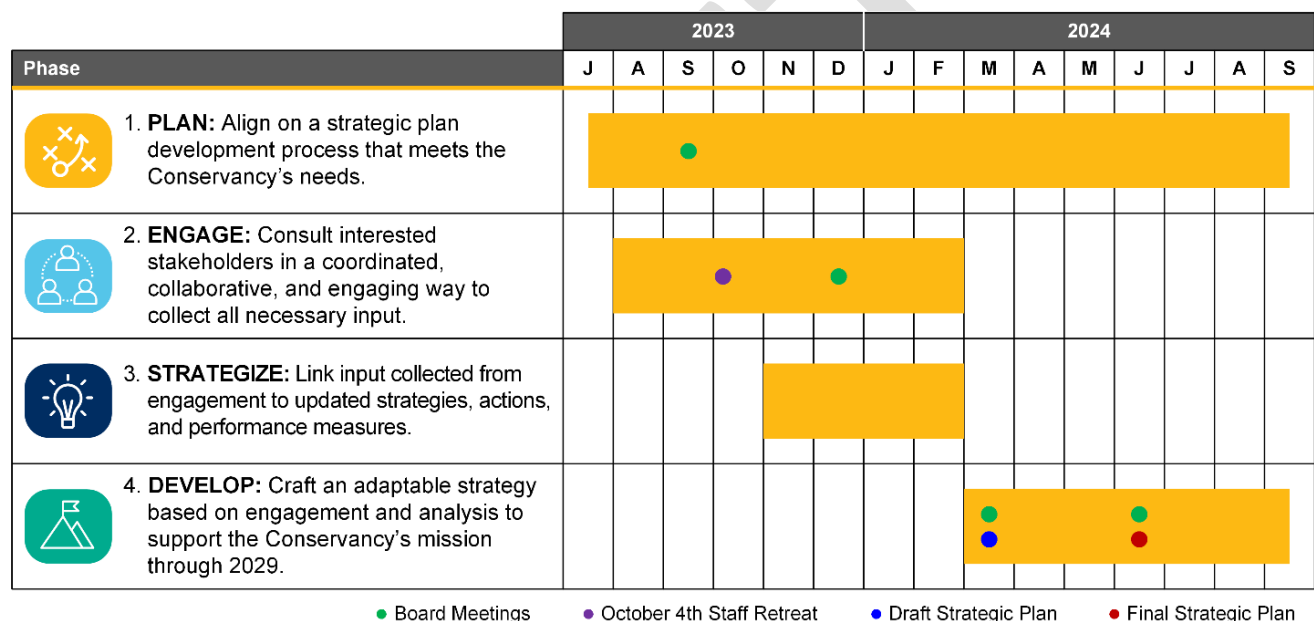
Focus Area	Considerations
Stewardship	<ul style="list-style-type: none"> • How to maintain the Conservancy’s lands at a larger pace and scale • How to streamline available resources and processes to maximize efficiencies • How to seize additional funding opportunities
Protection	<ul style="list-style-type: none"> • How to support innovative solutions that build on the Conservancy’s climate adaptation and biodiversity activities • How to continue to improve forest health within the Basin • How to continue to improve water quality within the Basin • How to maximize efforts and continue to build capacity to mitigate wildfire risks
Restoration	<ul style="list-style-type: none"> • How to reinforce and/or clarify the Conservancy’s role(s) in the Environmental Improvement Program • How to assure the Conservancy continues to lead restoration projects within the Basin • How to help revitalize the Lake Tahoe Basin’s urban centers
Public Access & Recreation	<ul style="list-style-type: none"> • Determine how housing and transportation fit within the Conservancy’s focus • How to expand equitable access for all • How to provide equitable access to information • How to expand the Conservancy’s capacity to support recreation activities and projects
People	<ul style="list-style-type: none"> • How to build capacity to educate the public on the Conservancy’s work and accomplishments • How to continue to build on the Conservancy’s racial equity commitments • How to continue to build on the Conservancy’s partnership with the Washoe Tribe • How to continue to maintain the Conservancy’s operational excellence / workforce culture

Attachment 1

2024-2029 Strategic Plan Development Process

Below is a snapshot of key phases and milestones as part of the Conservancy's 2024-2029 Strategic Plan Development Process. We plan to achieve key milestones during the following Board Meetings:

- **September 2023:** Conduct a public workshop to 1) present the strategic plan development process, and 2) gather insights and input on the development of guiding principles and focus areas for the Conservancy's updated strategic plan
- **December 2023:** Provide an update on the strategic plan development process
- **March 2024:** Present the proposed framework of the Conservancy's 2024-2029 Strategic Plan
- **June 2024:** Obtain approval of the Conservancy's final 2024-2029 Strategic Plan.



Attachment 2

Proposed Guiding Principles

Below are proposed guiding principles based on Board members' initial perspectives along with initial feedback from the Conservancy's Review Workgroup. Crowe presented these proposed options at the workshop and obtained feedback from attendees. Crowe will continue to work the Conservancy to build on and refine these options based on ongoing feedback.

Maintain the Basin for Future Generations	Seek Innovative and Science-Based Solutions	Lead with respect and inclusion	Support our staff to do their best work	Engage with our communities
<ul style="list-style-type: none"> Integrate climate resiliency into all activities and decisions 	<ul style="list-style-type: none"> Inform decision making with the best available science 	<ul style="list-style-type: none"> Advance racial equity through our programs and partnerships 	<ul style="list-style-type: none"> Optimize the expertise of all Conservancy staff 	<ul style="list-style-type: none"> Be responsive and transparent to meet public and community needs
<ul style="list-style-type: none"> Maintain flexibility to continuously meet evolving demands 	<ul style="list-style-type: none"> Integrate available resources for the best project outcomes 	<ul style="list-style-type: none"> Promote and expand access for all 	<ul style="list-style-type: none"> Maintain a learning culture 	<ul style="list-style-type: none"> Connect people to our work through engagement and communications
<ul style="list-style-type: none"> Continue to maintain and cultivate diverse partnerships 	<ul style="list-style-type: none"> Use all available tools and resources to deliver value 	<ul style="list-style-type: none"> Respect the values of all 		<ul style="list-style-type: none"> Engage with local Tribal leaders to align goals for the future of the Basin



Attachment 3

Key Policy Drivers

Below is a detailed list of the key policy drivers and associated roles based on feedback from workshop attendees. The key policy drivers and associated roles listed below provide the Conservancy with detailed insights to inform its focus areas and updated goals and strategies as part of the strategic planning process. The “x” indicates the number of responses for each key policy driver and associated role.

Key Policy Driver	Lead	Implement	Support	Fund	Inform
30 x 30 Initiative	x	x	x	xx	
Access to the Basin / Public Lands for All	x	xx	x		
ADA Compliance		x			
Affordable Housing	x	x	xx	xx	
Aquatic Invasive Species			x		
Balancing Community, Economy, and Environment			x		
Bear "Doggy" Doors in Fences			x		
Biomass			x	x	
Bi-State Compact			x		
Climate Action Plan		x	x		
Climate Adaptation	xx	xx	x	x	x
Climate as Overarching Consideration	x	x		x	
Climate Resiliency	xxx	xx		x	x
CO2 sequestration projects				x	
Community Infrastructure & Connectivity		x		x	
Connecting Recreational Trails / Bike Trails		x	x		
Convenor of Cross-jurisdictional Regulation / Access (e.g., Forest Service, State Parks, etc.)	x				
Destination Stewardship			xx		
Environmental Investment Program (EIP)	xx	x		xxx	
Equitable Access			x		
Equity Action Plan		x			
Equity and Environmental Justice			x		x
Forest Action Plan	xx			x	
Forest Resiliency – Management, Health, Preservation, & Technology	xx	x			x
Framework for Partner Collaboration	xx	xx		x	
Greenhouse Gas Reduction Fund					x
Hazard Fuel Reduction	x	x			
Hybrid Work Directives		x			
Impacts of Climate Change on Visitation	x				
Implement New Technologies	x				

Key Policy Driver	Lead	Implement	Support	Fund	Inform
Increasing Free Access to More Beaches	x			x	
Keeping Tahoe Communities Livable		x			
Local and Regional Area Plans			x		
maintaining and restoring CTC lands		x			
Minimize Carbon Footprint	x				
Nature and Culture resource - conservation and restoration on all lands			x		
Outdoor Access for All	xxx	xx	xxx	xxxx	
Provide More Support for Wildlife Corridors	x				
Public Engagement					x
Regional Plan Implementation				x	
Regional Transportation Plan (Lake Tahoe)		x			
Resilient Communities		x			
Science Advisory Council	x				
State Environmental Policies (e.g., CEQA)		x			
State Wildlife Action Plan	x				
Tahoe Livable Communities	x		x	x	
Tahoe Regional Plan			x		
Total Maximum Daily Load / Water Quality		x	x		
Transportation Mobility / Active Transportation / Multimodal Options			xxx		
Tribal Affairs and Engagement	x		xx		
Utilizing Nature to Combat the Climate Crisis		x			
Watershed Restoration	xx	x	x		
Wildfire Resilience	xx	x	x	x	
Wildfire Task Force Compact			x		

Attachment 4

Focus Areas

Crowe asked workshop attendees what Stewardship, Protection, Restoration, Public Access and Recreation, and People meant to them. The word clouds capture the responses and provide the Conservancy with detailed insights that highlight perspectives and sentiments to consider in support of the development of its updated strategic plan.

Stewardship



Public Access & Recreation



People

