# PRESERVING WILD CALIFORNIA
## AN EXTERNAL ASSESSMENT

**Report to the Resources Legacy Fund Foundation**


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# EXECUTIVE SUMMARY

Preserving Wild California, a program of Resources Legacy Fund Foundation (RLFF), was designed as a five-year, $150 million effort aimed at preserving California's wildlands and rivers and ensuring their protection through land acquisition, capacity-building, policy development and constituency-building. Between 2003 and 2008, the program funded more than 450 projects involving approximately 160 grantees and ranging across seven ecological regions in California. What activities did it fund? What has it accomplished? What has been its impact? What strategies have been most effective? What challenges has it faced? What lessons does it offer for future efforts to protect and restore California wildlands?

To answer these questions, we carried out an external assessment of the Preserving Wild California (PWC) program. Our work looked back at the projects and organizations funded by PWC to evaluate the impacts of the PWC investments and looked forward in deriving lessons from the PWC experience for future programs. We used data that analyzed the program from multiple geographic scales: statewide, regional or focal area, and individual grantees. We reviewed an extensive set of grant documents, used a grant database established and maintained by RLFF to track their grants, built a parcel-level database to analyze land acquisitions, and carried out interviews with 64 respondents, including staff, grantees and statewide observers.

## ***The Bottom Line***

As external evaluators, our mission is usually achieved by providing critique and finding the imperfections of a program. In PWC, however, there is much, much more to laud than to lament in both the way that the program was administered and its on-the-ground impacts. Part of the reason the program was successful lies in the strategic, pragmatic and adaptive way that RLFF implemented grantmaking. Indeed, many viewed the program as a model that other philanthropic organizations should use. Even the most critical of interviewees felt that the program was a "huge gift" to conservation in California.

Overall, PWC was very successful in the areas of acquisitions and organizational capacity-building, particularly in the Desert, North Coast and Sierra Nevada regions. Their purchase of inholdings within, adjacent to and between existing wilderness and other protected areas expanded protection and "cleaned up" a number of wilderness study areas to increase the likelihood that they would be designated as wilderness. By strategically focusing on corridors linking ecologically-significant areas, the impact of an acquisition extends beyond the acres purchased and dollars spent.

PWC investments contributed significantly to a transformation of the California wilderness policy debates from a polarized, nonproductive state into a bipartisan, more focused set of battles that produced legislation designating more than a million acres of wilderness in the Northern part of the state, Riverside County and the Eastern Sierra. They also helped conservation organizations play defense against a set of anti-conservation proposals. They brought critical strategic thinking to a variety of places in California, keeping an eye on how disparate pieces fit together and helping grantees to stay focused on the end goals, while building up the organizational infrastructure that enables sustained action. They produced a number of key studies and plans that will guide and empower conservation actions in the future.

PWC achievements in the areas of restoration and long term constituency-building were less significant. They funded much less restoration activity, so it is not surprising that there is less to report. They had mixed success in their constituency-building work, even while recognizing its long-term nature. Work on mobilizing nontraditional supporters for wilderness bills was very strong and community-based work in a number of key places in the state – most prominently, the Sierra, the Desert and the North Coast – should help to transform the "us versus them" dynamic often associated with environmental activism. While building support for wildlands protection in the Latino population is an important long-term need, the impact of PWC efforts to do so in Southern California and the Central Valley was more mixed, though part of that had to do with the explicit focus of the program on wildlands and its design as a five-year program.

We believe that the overall PWC story gives RLFF and California conservationists a great deal to be proud of. The lessons from this program about strategy and impact should be distributed broadly. The pieces of the program create a colorful tapestry that can be used to help weave a stronger fabric of conservation action across California and other states.

| Section | Topic | Key Questions |
|---|---|---|
| 2 | PWC Program Logic | What did the designers of the PWC program intend? What were the goals and objectives of the program? What strategies were seen as necessary to achieve outcomes? How were these outcomes measured? |
| 3 | Snapshot of Program Activities | What activities and how many organizations were funded by the PWC program? At what cost? Where were the organizations and activities located? |
| 4 | Grantmaking Style and Process | To what extent did RLFF's grantmaking style and process contribute to the effectiveness of the PWC program? How did it respond to changes in context and ongoing learning? |
| 5 | Land Acquisition | To what extent did PWC acquire significant elements of California's wildlands and ensure their permanent protection? |
| 6 | Capacity-Building | To what extent did PWC increase the capacity of the conservation community in California to advance wildlands protection? |
| 7 | Public Policy Change | To what extent did PWC secure public policy changes that increased wilderness and wildlands protection? |
| 8 | Constituency-Building | To what extent did PWC promote long-term political and constituency changes that make wildlands protection more likely in the future? |
| 9 | Science and Planning | To what extent did PWC generate new science and tools, an expanded set of plans, and new public processes that will guide future protection? |
| 10 | Directions for the Future | What do the experience with PWC and the perspectives of PWC grantees suggest about future programs for wildlands conservation and protection? |

# SUMMARY OF FINDINGS

## *Section 3 – What was Funded?*

1. While grants were distributed broadly across all seven regions of California, the largest portion of the PWC funds went to Statewide projects, the Sierra Nevada and the Desert. The lowest amount of funding went to the Modoc, the Central Valley and the Central Coast.

2. While two-thirds of the funding went to acquire land, more individual grants were made for policy development (175 grants) and capacity-building (104 grants). Very little funding or grants were made for restoration and stewardship purposes.

3. All project types were funded in each region, except for restoration and stewardship. The Desert, North Coast and South Coast were acquisition-heavy, while the Central Valley was policy-heavy (involving constituency-building activities).

4. Between 142,000 and 202,000 acres were acquired with at least partial PWC funding, depending on what one counts. The largest number of grants and proportion of acquired acres was in the Desert region (59,754 acres), followed by the North Coast (38,111 acres) and Sierra Nevada. (26,736 acres). A more moderate amount of land was acquired in the Modoc and the South Coast, with very little acreage acquired in the Central Valley and Central Coast. These regional patterns generally matched PWC's different goals for each region except in the Central Coast where acquisition fell most short of expectations.

5. Not surprisingly, acquisition projects were the most costly per grant, averaging $1.4 million each. Capacity-building, policy and restoration grants averaged $130,000 to $165,000 while planning grants cost on average $80,000. The program leveraged a considerable amount of additional investment, with PWC providing on average 39% of total project costs, though 40% of the grants were funded totally by PWC.

6. More than 160 organizations received PWC funding, and more than half received two or more grants. On average, between 10 and 20 organizations received support in each of the PWC regions, with larger numbers in the Sierra Nevada and the South Coast

7. The PWC program shows a consistent level of approximately $30 million in grantmaking per year, ramping up in 2003 and down in 2008. More acquisition grants were awarded early in the program, with additional capacity-building grants awarded later.

## ***Section 4 – Guiding and Administering the PWC Program***

*To what extent did RLFF's grantmaking style and process contribute to the effectiveness of the PWC program? How did it respond to changes in context and ongoing learning?*

1. RLFF planning for the PWC program was extremely thoughtful and strategic, and drew on a clear theory of action developed through a significant amount of pre-grantmaking work on prioritizing areas for protection based on science and politics.

    - The 2004 Strategy Book established a clear set of priorities based on considerable mapping and dialogue with California conservation groups.

    - Priorities were strategic choices, representing a mix of spatial analysis and political opportunities.

2. PWC is relatively unusual within the world of conservation philanthropy in its landscape-scale perspective and deliberate use of multiple interconnected strategies. Both help to explain the successes of the program.

    - Ninety-three of 165 organizations received more than one 2-year grants, enabling a sequence of actions over time.

    - Grants aimed at *action* (acquisitions, policy, restoration) were deliberately linked with grants that build *capacity* (capacity-building, constituency-building, planning).

3. RLFF implementation of the PWC program was solidly grounded in a set of performance metrics. The program evidenced significant adaptive learning and change.

    - Quantitative metrics were used appropriately to encourage reflection and refinement, but most – such as 1 million acres protected – were not used as absolute targets.

    - RLFF had to deal with changing political realities and shift to "playing defense" on some policy topics. Climate change was not mentioned in the 2004 strategy, but was seen as an emergent threat with limited grantmaking. Changes in Latino outreach strategies were imagined but seen in conflict with the short-term focus of the program.

4. The "strategic opportunism" orientation at the program level carried over to day-to-day grantmaking, which was pragmatic and flexible yet often invisible to others. At times PWC achieved outcomes by taking a middle road not often walked by environmentalists.

    - PWC grantmaking occupied the "strategic middle" of many issues: supporting community-based wildfire management, working with Republican lobbyists, negotiating compromises on Tejon Ranch, eminent domain policy and county sales tax measures.

    - RLFF operated "under the radar" to let grantees take credit for action, and to facilitate action out of the public eye.

5. RLFF's hands-on yet flexible style of interaction with grantees was extremely effective and produced a range of benefits.

    - Early and often interaction with grantees, along with a willingness to be flexible, helped fine tune proposals and provide encouragement and coaching, which in most – but not all cases – was appreciated.

    - An ability to act fast helped grantees deal with land acquisition complications and the challenges of waiting for public funding.

6. Working "under the radar" had several potential costs, including some minor coordination issues and a limited amount of consensus-building. The bigger issue may simply be a lost opportunity to energize the community through the perception of shared success.

    - In some complex areas of activity, such as wilderness policy, a couple of respondents claimed a lack of coordination among PWC-funded and others' related activities.

    - While consensus was not a program goal, some felt that RLFF lost an opportunity to build a strategic consensus within the California conservation community, and did not promote peer-to-peer learning in as many ways as possible.

7. The five-year time frame of the program had both pros and cons in terms of the effectiveness of the program.

    - Grant activity showed a relatively quick ramp-up in 2003, consistent funding levels in 2004-2007 and a phase down in 2008.

    - A somewhat longer program might have allowed for a more gradual start-up and transition out at the end of the program.

8. PWC program staffing was extremely efficient, utilizing a small number of very competent people in collaboration with a small number of very competent consultants.

    - An extremely small program staff carried out an overwhelming amount of oversight activities. Staff were themselves conservationists and hence were very effective at guiding grantmaking and working with grantees.

    - Program capacity was expanded considerably through the strategic use of consultants such as Shelton Douthit Associates (land transactions) and La Piana Associates (organizational development).

    - Some felt that there was a decisionmaking bottleneck in the structure of the PWC program within RLFF and Resources Law Group (RLG), its counsel and consultant, though we heard no complaints from grantees about delays in payments or administrative decisions.

    - End-of-grant activities could have been more thorough and reporting processes tightened to enable impact assessment, such as the acreage purchased with PWC funding.

## ***Section 5 – Protecting Wildlands through Strategic Land Acquisition***

*To what extent did PWC acquire significant elements of California's wildlands and ensure their permanent protection?*

1. PWC acquisition grants resulted in between 142,000 and 202,000 acres protected throughout California, depending on what one counts. Most of this acreage was located in the regions and areas identified as priorities for acquisition in the Strategy Book.

    - Seventy-eight acquisition grants purchased more than 570 land parcels at a cost of $94 million. The largest number of grants and proportion of acquired acres was in the Desert region, followed by the North Coast and Sierra Nevada.

    - Regional differences in acquisition matched PWC's goals for each region, except in the Central Coast where acquisition fell most short of expectations.

    - Ninety-two percent of PWC acquisition acreage was within identified Priority and Special Opportunity Areas. Only 10 grants fell outside focal areas. Acquisitions were made in 13 of 19 Priority Areas and 16 of 27 Special Opportunity Areas. The most limited success was in the Central Coast region.

    - Hotspots of acquisition activity include the Desert national and state parks, North Coast watersheds and the southern Sierra (Tejon to Sierra; Kern River watershed).

2. A reasonable percentage of the acquisitions, including the lands in which PWC invested the most, were considered by other organizations and experts as the 'right' places to invest.

    - Roughly half of the grant documents identified other groups' assessments (BLM, TNC, HCPs, NatureServe, etc) which spotlighted the proposed acquisitions as a priority.

    - Areas with high levels of acquisition activity matched others' priority assessments.

    - Many pointed to the PWC focus on acquisition of small parcels as a unique and valuable element of the program, because small inholdings are often more likely to be developed and have just as big an impact on protected areas as larger developments.

3. PWC acquired land within, adjacent to, or between an impressively large set of existing protected areas throughout California. This strategic placement of acquisitions increases the size, integrity and connectivity of existing wilderness areas, parks and wild and scenic rivers.

    - 95% of acquired parcels (representing 62% of acquired acreage) were inholdings within or adjacent to existing protected areas. Only two parcels were isolated from other protected areas: one was identified as a high priority in a conservation planning process; the other was a conservation easement located not far from a PWC priority area.

    - More than 80 protected areas (wilderness areas, national and state parks) were expanded, completed or connected by PWC-funded acquisitions.

- Some acquisition projects expanded wilderness areas through administrative designation by donations of lands immediately adjacent to existing designated wilderness.

- PWC grantees purchased inholdings within wilderness study areas which “cleaned them up” to enable designation of the lands as wilderness. Examples include the Elkhorn Ridge Wilderness Area in the North Coast and Beauty Mountain near Anza-Borrego.

- Anza Borrego State Park, the Smith River National Recreation Area, Joshua Tree and Death Valley National Parks, and the Mojave National Preserve all benefitted from PWC acquisitions of inholdings. Almost 10,000 acres of inholdings were acquired in existing wilderness areas, most in the Desert.

4. PWC acquisitions help to create large contiguous areas of protected lands which buffer the impact of threats including climate change, and create important habitat corridors.

   - Significant acquisitions helped to protect the Redwoods to the Sea corridor in the North Coast and the Missing Linkages areas in the South Coast.

5. PWC acquisitions help mitigate a number of key threats to wildlands, and contribute to the protection of a broad set of key species and ecosystems throughout California, most notably salmon habitat in the North Coast.

   - Acquired lands protected at least 51 habitat types, 47 sensitive animal species and 36 sensitive plant species.

6. PWC took unique measures to ensure the long-term value and permanent protection of acquired lands, most of which will ultimately be under public ownership.

   - 83% of acres acquired with PWC funding were fee simple acquisitions, 15% of the acreage was protected through conservation easements.

   - 60% of the acreage is in a public lands classification that assures significant protection.

   - Most if not all lands donated to public agencies were donated with specific restrictions on use, a major coup for the RLFF staff and consultants that negotiated these agreements.

7. Overall, PWC played a critical role in these land acquisitions, as a source of funding, but also in stimulating additional funders, and providing key expertise and contacts.

   - RLFF helped to catalyze broader funding packages, with two-thirds of the grants leveraging additional funds. On average, grantees raised $2.1 million in additional funds.

8. Grantees faced a variety of challenges in completing land acquisitions, including the sheer volume of effort involved in finding willing sellers and purchasing many small parcels in a program that valued wilderness inholdings. Donating lands to government agencies involved bureaucratic hurdles. Ultimately, relationships and partnerships were seen as critical to the success of many acquisition projects.

## *Section 6 – Building Organizational Capacity for Wildlands Protection*

*To what extent did PWC increase the capacity of the conservation community in California to advance wildlands protection?*

1. PWC invested in a wide range of organizations within California, targeting both well-established and fledgling organizations. RLFF staff used an experimental and adaptive approach to their organizational investments. Their impact on fledgling organizations was particularly transformative.

   - Project grants were made to 122 nongovernmental organizations, 33 consultants and 10 university groups. These included land trusts, advocacy groups and community groups, as well as traditional environmental organizations and some nontraditional groups.

   - Forty-one of the 58 organizations identified in the Strategy Book received funding, representing 37% of the organizations ultimately funded.

   - While many grants helped build capacity through project-specific activities, about a quarter of the program's grants were explicitly targeted at capacity-building, representing $16.5 million in investments to 55 organizations (plus consultants who worked with these organizations.)

   - Some fledgling groups were particularly transformed by the investments, including groups like the Smith River Alliance in the North Coast, the Friends of the Inyo in the Eastern Sierra and the Mojave Desert Land Trust.

   - Established organizations like the Mono Lake Committee were able to use the funds to explore new strategies or structures that might enhance their effectiveness.

2. RLFF adopted a hands-on, multi-pronged approach to capacity-building under the PWC program. They recognized that a one-size-fits-all strategy would fall short and instead tailored program support to the particular needs, interests and opportunities inherent in each grantee organization.

   - Many organizations received organizational advice from RLFF program officers, and 17 key grantees received in-depth assessments by La Piana Associates.

   - Some capacity-building work focused on development of Boards and staff, with at least 3 cases described where the PWC funded assessments were used to encourage shifts in Board membership. Executive director salaries were supported as was additional staff to take pressure off EDs and provide key fundraising and communications personnel.

   - Strategic planning processes were supported in at least 15 organizations; at least 22 received grants supporting fundraising planning and donor development.

3. Through grants to organizations, RLFF simultaneously invested in individuals, and were effective at selecting passionate and committed people with a track record that demonstrated potential. One of the legacies of the PWC program is the mosaic of talented individuals whose capabilities were enhanced through participation in program activities and trainings.

4. PWC helped establish networks that connect geographically-dispersed organizations, which facilitates communication, coordination and joint learning. These networks appear to be thriving, and are serving as productive forums for land trusts in particular.

   - Key accomplishments were the creation of the California Council of Land Trusts and the Eastern Sierra Environmental Round Table.

5. Quantifiable, visible organizational gains are readily apparent as a result of the PWC work on organizational capacity-building.

   - Many grantees described a shift in their strategic outlook on how they choose activities and carry out campaigns. Some are more community-based and pragmatic.

   - We saw a number of signs of enhanced professionalism in the way that smaller conservation organizations are managed and financed.

   - A number of organizations that received PWC support are showing significant increases in funding derived from grants, donations and membership contributions.

6. While PWC's investments certainly improved the organizational infrastructure of many California NGOs, they also enabled the groups to build legitimacy and hence power within their communities, and instilled a sense of confidence within the organizations themselves.

7. It seems likely that a number of conservation outcomes attributable to the PWC program would not have been achieved without PWC's investments in organizational capacity. One of the key enablers of on-the-ground action may well be a change in the cultural and political dynamics of conservation in rural California communities, assisted by PWC support of small, grassroots conservation groups.

   - Visible shifts can be seen in rural communities in the North Coast, Sierra and Desert where PWC grantees are working, such that elected officials are more supportive of conservation objectives.

8. While many of the organizations funded by PWC stand a good chance of sustaining their effectiveness into the future, the loss of unrestricted funds will redirect some organizations into a narrower, funding-driven agenda. In some areas, a lack of funding may result in a need for consolidation across organizations.

   - Grantees were concerned but not panicked about their ability to sustain their activities. Statewide observers were more concerned that groups that had been seeded by PWC would be able to sustain themselves, but still felt that only a few might not survive.

## ***Section 7 – Changing Public Policies that Affect California Wildlands***

*To what extent did PWC secure public policy changes that increased wilderness and wildlands protection?*

1. Through the PWC program, RLFF achieved considerable success in its policy initiatives by funding a wide range of activities aimed at increasing protection. Program administrators recognized that wildlands protection is affected by many different types of public policies produced and implemented by multiple levels of government.

   - From a review of grant documents, we found evidence of 36 different policy initiatives affected by PWC-funded work. Eighty-one percent were successful, and others showed progress.

   - Twenty-three of these initiatives focused on wilderness or wild and scenic river designation and other public lands protection measures. Seventeen of these were enacted or promulgated, most notably the 275,830-acre North Coast wilderness bill, 198,491-acre Riverside County wilderness bill, the 472,805-acre Eastern Sierra and Northern San Gabriel wilderness bill, the Cache Creek State Wild and Scenic River designation and the enhanced future protection of Fort Hunter Liggett, a 165,000-acre parcel adjacent to the Ventana Wilderness in Monterey County near Big Sur.

2. PWC-funded activities helped to increase the flow of funding to California conservation in general and to support specific acquisitions.

   - Four initiatives focused on increased conservation funding, including the successful passage of Proposition 84, which provides funding for all state natural resource protection and water programs, and county-level tax measures in Orange County and San Diego. PWC funded research and outreach that informed the campaigns and lobbying work of others.

3. PWC grantees also helped to avoid “bad things” from happening by working against proposals to change policies in wildlands-unfriendly ways. Efforts to “hold the line” were arguably of equal importance to the future of California wildlands as more proactive policy initiatives.

   - Nine measures involved defensive stances. Most proposals were successfully stopped, in part by PWC-funded activities. Most notable is protection of the Sierra Nevada Framework for management of the national forests in the Sierra and the efforts to turn back major constraints on local government’s ability to use eminent domain for public purposes (Propositions 98 and 99). Again, PWC funded research that informed the campaign work of others.

4. Campaigns to secure federal wilderness designations were highly successful and illustrate the strategic, deal-making role played by RLFF and PWC-supported grantees in a politically challenging time.

    - The PWC program with its goal of 750,000 to 1.5 million acres of new wilderness designation came into being at the incredibly inopportune time of a very conservative, Republican-controlled Congress and a conservative Republican President. The fact that more than a million acres of California wilderness was designated through the 2006 North Coast bill and the 2009 Omnibus Public Lands bill can be laid in large measure to the multiple investments of PWC.

    - Shifting the wilderness debate from a statewide to a district-by-district perspective was important to achieving success, though challenging within the California conservation community.

    - Decentralizing the campaign organization was encouraged by RLFF and helped to streamline wilderness designation activities.

    - RLFF helped to build strategic networks of organizations that functioned as a "seamless team" functioning at the grassroots, state and D.C. levels.

    - Finding Republican sponsors of wilderness legislation and using Republican lobbyists to conduct outreach to new members of Congress were transformative moves that enabled legislation to be passed.

    - While most environmental groups were not trusted enough by powerful decision makers to engage in productive negotiations, and many groups were unwilling to "work with the enemy," RLFF and its PWC-supported consultants were trusted and effective at bridging parties and ideologies to help make deals happen.

5. Short term wins matched with investments in long term change are needed for successful wildlands conservation. PWC investments in the Sierra Nevada Forest Protection Campaign helped maintain hard-fought gains captured in the 2001 Sierra Nevada Framework while building a long term community-based constituency for ecologically-sustainable forest management.

    - Policies are only as strong as the political coalition that supports them, and the policy battles that PWC engaged in require both short term wins and shifts in attitudes and relationships that will assure long term gains.

    - An outstanding example is in the evolution of the Sierra Nevada Forest Protection Campaign into Sierra Forest Legacy, with an expansion of strategies from advocacy and litigation to community-based forest management and planning, with a focus on wildfire risk reduction and small diameter wood products. PWC supported this shift in perspective by project-level and capacity-building grants, including helping key staff reframe their communications and messaging. This shift appears to be helping to change the dynamics in several rural communities in the Sierra.

## ***Section 8 – Building Long Term Constituencies for Wildlands Protection***

*To what extent did PWC promote long-term political and constituency changes that make wildlands protection more likely in the future?*

1. PWC's policy work involved outreach to mobilize traditional and nontraditional constituencies in support of arguments made to elected officials. Some of these outreach efforts should bear fruit over the long term, if they are reinforced through future activities.

   - Engagement of Republicans, business interests, sportsmen and others in the wilderness bills may lead to other opportunities to engage these interests, if ongoing relationship-building and outreach occurs.

   - The most successful grounds for future mobilization lies in a perception of mutual interest and/or a change in relationships at the community-level that opens the door to conservation interests. The community-based work in the North Coast, Desert and Sierra provides some grounds for hope that long-term support may be generated.

2. A significant amount of funding was spent on outreach and constituency-building among the California Latino population, and was carried out by environmental, Latino and faith-based groups.

   - Approximately 27 grants were made to 15 organizations with the primary purpose of constituency building among Latino communities. These investments included work in the South Coast that involved both traditional environmental groups as well as Latino organizations. In the Central Valley, more work was done by traditional environmental groups including Defenders of Wildlife, though several local groups, such as the Catholic Charities Diocese of Stockton, were funded.

   - A range of activities were funded including research on attitudes of Latinos toward conservation issues, outreach and community education, media work, voter registration and job training.

3. While it is too soon to judge whether or not new constituencies for wildlands protection will emerge, PWC grants for constituency-building nonetheless sparked some innovative activities, produced a number of notable accomplishments and revealed some important lessons for future constituency-building work.

   - While some staff and observers viewed PWC's nontraditional constituency-building efforts as less effective than other PWC strategy areas, our assessment identified a number of tangible and valuable activities leading to a set of outcomes that are not insignificant.

   - A number of grantees indicated that the funding enabled them to experiment with outreach strategies and more diverse staffing arrangements, which has enabled them to "think outside the box," in approaching the challenge of diversifying the conservation movement.

- Some policy battles showed the results of the constituency-building work, most notably community input into national forest planning for the four forests in Southern California, and opposition to a toll road to be built through the San Onofre Beach State Park.

- Programs involving outreach to Latino youth had some challenges, but were generally well-subscribed with nearly 27,000 individuals involved in TreePeople's Natural Connections Program and 4,200 in the Los Angeles Conservation Corps' Wilderness Awareness Program.

4. While the program's grantees created projects of real value, the starting frame of the PWC program – a focus on wildlands – was not one that was well-matched to the more immediate needs and opportunities associated with outreach to Latino groups.

    - Wildlands are not seen through the same cultural lens by Latino and other nontraditional groups, and their interest and use varies from traditional environmentalists. Grantees such as the San Joaquin River Parkway and Conservation Trust were able to incorporate cultural understanding into their projects.

    - Framing and local relevancy are critical to success, and approaching outreach through a focus on urban rivers and recreation along with environmental justice or public health might yield stronger long term connections with Latino populations. However, these frames were seen as too far from the PWC program's focus on "pure" wildlands areas.

5. The timeframe for success of the PWC program – a five-year funding cycle showing tangible impacts with most grants focused on 1-2 year periods of accomplishments – was not well matched to the need to build long term understanding, trust and relationships.

6. Unlike many PWC projects, several constituency-building grants were less clear about the kinds of ultimate outcomes that would be achieved through the funded activity. Having fuzzier notions of a project's program logic – the way it moves from activities to impacts – made it more challenging to manage some of the projects to an endpoint that would satisfy PWC's goals, and made it difficult to measure the success of these projects.

7. Many PWC projects recognized the Latino population as diverse, with numerous subgroups arrayed geographically, economically and culturally. In grantmaking, the population should not be viewed as monolithic.

8. Culturally-sensitive outreach activities have led grantees to carry out work in very different ways than traditional environmental outreach.

    - Grantees were more successful at outreach when they used a *Promotora* approach and worked through existing social networks associated with family and church. Being sensitive to cultural variables in project design was also important.

9. While PWC engaged in a relatively limited amount of capacity-building work aimed at building long term outreach and engagement capabilities, grantees engaged in these activities reported significant organizational impacts and challenges.

## ***Section 9 – Supporting Science and Planning To Guide Future Protection***

*To what extent did PWC generate new science and tools, an expanded set of plans, and new public processes that will guide future protection?*

1. PWC invested in scientific research and analysis to assess conservation potential and the costs of development. PWC also underwrote new spatial and data management tools that enhanced the ability of the conservation community to use scientific information.

   - While new science was not a particularly explicit goal of the PWC program, creating "apply-able science" was seen by RLFF staff as a precondition to action in a number of places. In one notable success, a PWC-funded conservation assessment of the Tejon Ranch, the largest contiguous privately-owned land parcel in California, helped to create understanding and momentum that ultimately enabled negotiations that led to protection of 240,000 acres of ranch property.

   - PWC-funded research on the costs of growth and the impact of overuse of resources is being used as ammunition by advocacy interests in a number of places, including the Amargosa River, one of the two major rivers in the Desert.

2. PWC helped create scientifically-credible strategies for acquisition of key conservation parcels and management of those parcels once they were in conservation ownership. These strategies provided significant guidance to RLFF and its grantees, and created innovative models for landscape-scale protection of wildlands.

   - Development of spatially-explicit acquisition strategies in the Smith River Watershed and the Las Californias Binational Conservation Initiative helped provide guidance and support fundraising for acquisitions by PWC-funded grantees.

3. One of the more significant impacts of PWC's grantmaking was the identification of important landscape-level linkages needed to secure functional connections between existing wildland reserves to maintain landscape-level ecosystem processes, including movements of wide-ranging species.

   - RLFF staff increasingly saw the value in focusing investments in important landscape-scale corridors. One of the more significant science investments was the work done on identifying "Missing Linkages" in the South Coast area. A set of linkage designs was developed by PWC-grantee South Coast Wildlands through a series of expert workshops. These designs are being used by a range of agencies and organizations to guide protection.

4. PWC also enabled wildlands advocates to participate in important public planning processes at the county and federal levels. By helping to keep wildlands interests “at the table,” PWC made it more likely that conservation objectives will be codified in these plans. Most planning processes take a long time to reach a conclusion, however. As a result, ongoing advocacy is critical to future conservation success but somewhat mismatched to PWC’s need to demonstrate short term wins.

   - PWC-grantees were involved in county-level planning initiatives in Amador, Calaveras, Humboldt, Orange, San Diego and targeted counties in the Sierra.

   - Following passage of the TransNet sales tax in San Diego, the Endangered Habitats League is working to strengthen the County’s General Plan update, with an emphasis on conservation of wildlands and purchase of open space.

5. Landscape-scale conservation requires partnerships among diverse agencies and groups. PWC investments helped build some of these multiparty collaborative groups which provide structures for landscape-scale decision making and action.

   - PWC helped support development of the Blue Ridge Berryessa Natural Area Conservation Partnership, a multiparty public-private collaborative effort focused on protection and restoration of this critical area of largely undeveloped land in the Cache Creek/Clear Lake area. The funding moved a partnership that was fairly ineffective into a more active and action-oriented process.

6. In understanding the strategic connections between good information, well-articulated plans and the ability to secure protective action, PWC recognized that conservation results require a multi-year and stepwise commitment.

7. Although climate change was not identified as an explicit threat to wildlands in the 2004 Strategy Book, several climate change projects were funded later in the program and other funded activities will help in adapting to climate change.

   - Climate change was viewed as a focal area by RLFF staff, but there is little evidence that it was a particularly significant focus of grantmaking activity. Several scientific studies funded in 2006-2008 focused explicitly on climate change and its connections to wildlands protection and conservation. Notable among these is work by the Watershed Center at the University of California at Davis to develop science-based tools to facilitate a shift in the FERC hydropower relicensing process to a system-wide approach that addresses the regional impacts of climate change on aquatic and riparian ecosystems throughout the Sierra.

   - Fortunately, many of the other activities funded by PWC move in the direction that climate change adaptation takes us: protection of important corridors and blocks of habitat, transformation of land management to account for changes such as drier and hotter conditions leading to increased wildfire risk, and expanded yet sensitive development of alternative energy and water sources. All should benefit from the investments that PWC made in California wildlands conservation.

# - 1 -

# INTRODUCTION AND METHOD OF ASSESSMENT

Preserving Wild California, a program of Resources Legacy Fund Foundation (RLFF), was designed as a five-year, $150 million effort aimed at preserving California's wildlands and rivers and ensuring their protection through land acquisition, capacity-building, policy development and constituency-building. Between 2003 and 2008, the program funded more than 450 projects involving approximately 160 grantees and ranging across seven ecological regions in California. What activities did it fund? What has it accomplished? What has been its impact? How has it leveraged other resources to achieve conservation? What strategies have been most effective? What challenges has it faced? What has promoted on-the-ground success? What lessons does it offer for future efforts to protect and restore California wildlands?

> *As external evaluators, our mission is usually achieved by providing critique and finding the imperfections of a program. In PWC, however, there is much, much more to laud than to lament in both the way that the program was administered and its on-the-ground impacts.*

To answer these questions, we carried out an external assessment of the Preserving Wild California (PWC) program. Our work looked back at the projects and organizations funded by PWC to evaluate the impacts of the PWC investments and looked forward in deriving lessons from the PWC experience for future preservation programs. We expect that the observations contained herein provide insights into future strategic choices and help frame expectations about what can be accomplished with an investment of this magnitude in land protection at the landscape scale. We also attempt to identify actions that appear to be most transformative.

This report summarizes our analysis and conclusions. Much of it is written as a series of declarative sentences that highlight our key observations and lessons, followed by the quantitative and qualitative evidence that supports the statements. We used data that analyzed the program from the multiple geographic scales: statewide, regional or focal area, and individual grantees. We reviewed an extensive set of grant documents, used a grant database established and maintained by RLFF to track their grants, carried out interviews with 64 respondents, including staff, grantees and statewide observers. These sources of information provide quantitative and qualitative information which underlie our observations. We believe there is valuable information in both the statewide perspectives and the individual anecdotes and stories, and have attempted to capture them here.

## *The Bottom Line*

For those that skip to the last few pages of novels to learn how they end, we offer this: As external evaluators, our mission is usually achieved by providing critique and finding the imperfections of a program. In PWC, however, there is much, much more to laud than to lament in both the way that the program was administered and its on-the-ground impacts. Part of the reason the program was successful lies in the strategic, pragmatic and adaptive way that RLFF implemented its grantmaking. Indeed, many viewed the program as a model that other philanthropic organizations should use. Even the most critical of interviewees felt that the program was a "huge gift" to conservation in California.

Overall, PWC was very successful in the areas of acquisitions and organizational capacity building, particularly in the Desert, North Coast and Sierra Nevada regions. Their purchase of inholdings within, adjacent to and between existing wilderness and other protected areas expanded protection and “cleaned up” a number of wilderness study areas to increase the likelihood that they would be designated as wilderness. By strategically focusing on key corridors linking ecologically-significant areas, acquisition dollars had much more impact.

PWC investments contributed significantly to a transformation of the California wilderness policy debates from a polarized, nonproductive state into a bipartisan, more focused set of battles that produced legislation designating wilderness in the Northern part of the state followed by wilderness designation in Riverside County and the Eastern Sierra when the politics of public lands changed in 2009. All told, over 1 million acres of new wilderness was designated as a result of campaigns partly funded by PWC. The program also helped conservation organizations play defense against a set of anti-conservation proposals throughout the Bush administration. PWC staff and consultants brought critical strategic thinking to a variety of places in California, keeping an eye on how disparate pieces fit together and helping grantees to stay focused on the end goals, while building up the organizational infrastructure that enables sustained action. They produced a number of key studies and plans that will guide and empower conservation actions in the future.

PWC achievements in the areas of restoration and long term constituency-building were less significant. They funded much less restoration activity, so it is not surprising that there is less to report in terms of success. They had mixed success in their constituency-building work, even while recognizing its long-term nature. Work on mobilizing nontraditional supporters for wilderness bills was very strong and community-based work in a number of key places in the state – most prominently, the Sierra, the Desert and the North Coast – should help to transform the “us versus them” dynamic often associated with environmental activism. While an important long term need, the impact of PWC efforts to reach out to the Latino populations in Southern California and the Central Valley was more mixed, though part of that had to do with the explicit focus of the program on wildlands and its relatively short time frame.

This report provides the basis underlying these bottom-line assessments, and importantly, provides some of the reasons that the program has been successful. It is critical to learn from this very significant experiment in wildlands conservation at a state-scale, so that future efforts can step off from this foundation. Individual stories about smaller-scale, community-based accomplishments can be used to motivate future action. We believe that the overall PWC story gives California conservationists a great deal to be proud of. The lessons from this program about strategy and impact should be distributed broadly to guide, motivate and empower the conservation community. The pieces of the program create a colorful tapestry that can be used to help weave a stronger fabric of conservation activity across California and other states.

## *Methods Used to Carry Out the External Assessment*

Research to carry out the assessment was carried out over a five-month period, with revisions and updates intermittently over a subsequent eight-month period. The assessment included work at three spatial and conceptual scales:

- *State-wide analysis* that included data from all PWC grants to identify funding and activity patterns, as well as a set of interviews with individuals who were not grantees but were familiar with the overall program
- *Regional and subregional analysis*, which focused on a sample of about of a third of the grants to explore activities, accomplishments, challenges and lessons from a grantee and focal area perspective
- *Individual grantee analysis*, to understand the perspectives at the ground-level

No program logic model existed, so we developed one drawing on the extensive outline of goals, objectives and strategies contained in a program Strategy Book developed in 2004 to guide grantmaking. This logic model and the specific metrics contained in the Strategy Book were used as one of the baselines for comparison. We also used our own experience with evaluating other conservation programs to judge whether activities carried out were well-targeted to desired outcomes, and to distill out factors that facilitated success and those that were challenging. We asked interviewees what would have happened absent the existence of the PWC program, and asked them to compare PWC grantmaking styles to those of other funders.

Specific steps in developing the assessment are as follows:

1. <u>Examination of strategy documents and a sample of grant documents</u>

   We received copies of Program Strategy documents from RLFF along with a small sample of grant documents. We reviewed these materials in order to orient the assessment team to the program, and frame an initial set of interview questions for RLFF leadership and staff.

2. <u>Interviews of current RLFF leadership and staff on-site</u>

   Dr. Yaffee spent a day in Sacramento at RLFF's offices interviewing the entire PWC team, including key RLG and RLFF staff and advisors who were involved in developing and implementing the PWC program strategy. These interviews ranged from 45 minutes to two hours and were digitally recorded and were used to get a clear understanding of: (1) the original program logic including targeted activities, regions and choice of grantees; (2) changes in direction made as the program developed; (3) perceived accomplishments; (4) perceived challenges; and (5) critical questions to pursue through the program evaluation. The grants database was explored to understand its data and capabilities; specific versions of the database were requested to be sent to the assessment team. The assessment team continued to interact periodically with PWC program officers to clarify questions.

3. Development of a set of overarching evaluation questions

   Based on our initial read of the program Strategy Book, grant documents and Sacramento interviews, we developed a list of evaluation questions that we would pursue through the assessment. Most of these questions ask whether specific areas of outcomes were achieved. These questions framed our investigation and provide the overall skeleton for this report.

   - To what extent did RLFF/PWC's grantmaking style and process contribute to the effectiveness of the program? How did they respond to changes in context and ongoing learning?
   - To what extent did PWC increase the amount of permanently protected wildlands in California? To what extent did PWC protect or enhance lands with high conservation value?
   - To what extent did PWC increase the capacity of the conservation community in California?
   - To what extent did PWC secure public policy changes that increased wildlands and wilderness protection?
   - To what extent did PWC promote long-term political and constituency changes that make wildlands protection more likely in the future?
   - To what extent did PWC generate new science, expanded tools, new plans and updated public processes that will guide future protection?

   We also wanted to determine lessons for future grantmaking drawing on the experience of the PWC program and the advice of key respondents.

4. Aggregate analysis using the PWC grants database

   RLFF had developed a fairly comprehensive set of Access databases for tracking grant activity. While we had originally imagined coding all grants into various strategy and outcome categories, the RLFF database contained data that was as good as any we would have developed through coding. Hence, we downloaded a number of their variables into an Excel spreadsheet, which was then used to conduct analysis of the aggregate data. In this way, we could assess how much funding, how many grants and how many organizations were funded by strategy type, region and year of grantmaking. We could also evaluate whether grants were located in expressed priority areas, and for many grants, could examine the self-reported outcomes described in final reports that had been uploaded into the spreadsheet.

5. Extensive review of a sample of grant documents

   Copies of all grant documents were requested and received in digital form from RLFF staff. For most grants, these included proposals from grantees and RLFF staff write-ups used for review and discussion at RLFF Board meetings along with interim and final reports. Hence, in the best of cases, documents provided a "paper trail" of evidence describing project intent, RLFF intent and accomplishments. RLFF provided all grantees with a reporting form that asked for a brief listing of 1) project goals; 2) project objectives; 3) progress/process outcomes (work to date); 4) outcomes (tangible results); and 5) lessons learned. Unfortunately, not all grantees used the form or used it effectively.

Due to the amount of grant activity, we needed a sampling scheme. While we considered a stratified random sample of grants based on strategy type, we decided that approach would be less effective in seeing overall patterns of activities. So we asked RLFF to identify exemplars of focused activity – including both successful and challenged areas of grantmaking. Program staff defined a set of eight focal areas of activity that they viewed as several of the major nodes of activity of the program. Some are largely defined by the geographic region in which they are located; others are primarily associated with a type of strategy. The eight focal areas were:

- *North Coast watersheds*, which included acquisitions, capacity building and some restoration work
- *Blue Ridge-Berryessa Natural Area/Cache Creek State Wild and Scenic River*, which is located in the North Coast region, and included acquisitions and policy work
- *Sierra Nevada*, including capacity building, acquisitions, planning and policy work
- *Latino constituency-building* in the South Coast and Central Valley
- *Desert wildlands acquisitions*, primarily focused on inholdings and work on the Amargosa River corridor
- *Wilderness designation campaigns*, involving work on the North Coast, Riverside Coast and Eastern Sierra bills
- *Land use planning and policies*, primarily in the Central Valley and Southern California
- *Climate change*, primarily research and acquisitions producing corridors enabling adaptation.

We reviewed a sample of grant documents for many of the projects that fell under each of these focal areas.

6. <u>Summarization of grant activity and initial observations in focal area reports</u>

We then wrote internal reports on the grantmaking in the focal areas. These sought to summarize the amount and type of funded activities and provide a narrative discussion of the outcomes that resulted from the grantmaking and any patterns or lessons that could be identified from the grant documents. These were used writing the overall assessment report.

7. <u>Development and analysis of a data base focused on land acquisitions</u>

Since land acquisitions constituted approximately two-thirds of funds spent on the PWC program, we wanted to analyze this component of grantmaking as quantitatively and thoroughly as possible. Unfortunately, the grants database was somewhat incomplete in describing what actually was acquired and did not go far enough in describing the type of protection achieved or threats averted to provide a basis for evaluation. Hence, we decided to construct a parcel-level database for the 78 Acquisition grants. Information on 570 acquired parcels was obtained from the RLFF database combined with scans of PWC grant documents. This was supplemented with specific information gleaned from online maps and maps provided by GreenInfo, from interviews with a sample of grantees, as well as from some grantee websites, press releases, and news stories. This variety of sources allowed us to compile a relatively rich parcel-level dataset which included information on acreage, amount awarded, location relative to identified priority areas and existing protected areas, resulting ownership, and other measures of conservation value, such as key threats averted and key species or habitats protected. We were able to use several others' assessments of conservation value to validate the significance of the PWC acquisitions.

8. Interviews of a sample of grantees and former PWC staff

   We conducted semi-structured open-ended telephone interviews with a sample of grantees and RLFF consultants, drawing primarily from the focal areas, along with former PWC staff. Interviews were conducted with 44 individuals and ranged from 30 minutes to 2 hours in length. An interview protocol was used with a core set of standard questions, but each interview added respondent-specific questions. Interviews were digitally recorded, transcribed and coded, providing the basis for the quotations offered as data in the report. All interviewees were assured that we would not be quoting individuals by name. In only a couple of cases were respondents concerned about anonymity.

9. Interviews of a set of statewide observers

   We also interviewed a set of 20 statewide observers. These were individuals who were seen as having a broader perspective on the impacts of the program and were not grantees. They included 14 individuals that RLFF identified along with six additional individuals who were not identified by RLFF for external validation purposes.

10. Development of a draft report

    Drawing on the multiple data sets and focal area reports, we constructed a draft report structured around the overarching evaluation questions.

11. Development of maps to illustrate grant activity spatially

    Working with GreenInfo network, a PWC consultant, we developed a set of GIS-based maps at the state-scale, regional-scale and "individual story" scale to support the assessment.

12. Review and finalization of the report.

    RLFF staff were provided hard copies of the draft report for review. Considerable back-and-forth work followed to ensure that the land acquisition analysis was as accurate as possible, given challenges in defining PWC's role in several acquisitions (see below). We also held off finalizing the report until the results of the final round of grantmaking (last three quarters of 2008) could be included. As it turned out, this allowed for inclusion of a set of significant policy outcomes that occurred with change in the Congress and presidency in early 2009.

## *Some Caveats*

While the PWC program was innovative in its multi-strategy approach (acquisition, policy development, capacity-building and constituency-building), the diversity of these strategies and the magnitude of PWC activity in a relatively short period of time make assessment challenging. Observable outputs and outcomes as a result of these investments differ among strategies. Regional variation in the "baseline" for assessment is also challenging to post-hoc assessment.

### Land Acquisitions

While we tried to depict land acquisitions at the parcel level as accurately as possible, our assessment should be viewed as a relatively conservative estimate of accomplishments. For some grants, acquisitions are still occurring and assessment of the number of acres acquired is premature. For others, grantees completed acquisitions but had not filed final grant reports. Based on the available grant documents, only around three-quarters of the grants made before 2007 completed final reports to date. Even fewer grantees -- only an estimated 25% -- reported final acreage information for mapping final grant activity.

While this in part reflects some slackness on the part of both PWC staff and grantees in reporting final outcomes, we discovered from interviews that especially for the more recent grants, but also for many others, final results are not available because acquisitions are still pending. It is difficult to estimate how this would affect final acreage assessments, but some of the pending parcels are definitely large. For example, the Smith River Alliance has a more-than-5,000 acre acquisition along the Hurdygurdy Creek in the North Coast that is still in progress. Even a 2005 grantee stated that they still had thousands of acres pending for acquisition. A definite time lag exists between having a proposal accepted and making an acquisition with the awarded funds. Thus, an absolutely complete assessment of acquired acreage less than two to three years from the date that the last grant was disbursed is not possible.

While these reporting and lag time issues can be frustrating to those seeking a complete accounting of the PWC accomplishments, we believe that the overall picture of accomplishments would not change qualitatively if we had complete information. There may be more acres acquired, for example, but the patterns of where those lands were acquired and their protection status would be unlikely to shift significantly.

### Baseline for Comparisons

External assessments require points of reference and comparison in order to reach conclusions, yet the magnitude and character of the PWC program limited the kinds of comparables that could be used. In many ways, each of the strategy areas requires its own comparison, which would also vary for different geographic regions. We did ask respondents their assessment of what would have happened if PWC had not been in place and received fairly rich responses. When we asked about grantmaking style and strategy, we also asked for comparisons with other funders. In several places, we implicitly compared PWC to the earlier Packard-funded CCLI program, but its focus was much more on working landscapes, which limits its basis for comparison. For parcels acquired through PWC funding, we were able to compare their conservation value against assessments made by others of the conservation value of those geographies. But this was tricky, because most other assessments had been used originally to develop the Priority and Special Opportunity Areas in the Strategy Book.

Otherwise, we decided fairly early on in the assessment that there were no significant comparable programs that could be relied on in any quantitative way for assessing PWC. We believe that our work at predicting what would have happened without PWC by drawing on numerous respondents' evaluations is as good as more detailed work at developing a case study of a comparable grantmaking program. Ultimately the contextual details of that comparable program would have undermined our ability to use it as a counterfactual.

## Sampling Bias

As with all studies, the quality of the data relies on the design for sampling and motivating respondents. In this case, there are two challenges associated with sampling. First, the PWC program involved more than 450 grants to 132 nongovernmental organizations, along with contracts with 33 consultants. Our work involved reviewing grant documents for approximately a third of the grants for focal area work, and closer to half the grants for smaller-scale reviews and examples. This would be a great sample size in most studies, but because the sampling was not done randomly, but rather mostly by focal area, we do not know for certain whether the patterns associated with focal areas miss patterns associated with other grants. In response, we would say that our scan of a number of the grants outside of focal areas did not reveal any particular concerns such that we felt the need for more detailed and expansive work.

Additionally, most of our data comes from involved parties – grantees, RLFF staff and statewide observers, many of whom have been beneficiaries of the program (though not financially). While the California wildlands community has a significant number of organizations within it – both in the area of land trusts, advocacy groups and others – it is a fairly close set of organizations, with networks of relationships between most of these players. Hence PWC's investments benefited most of the people we could have talked to as observers. We did seek out several respondents who were viewed as likely to offer different perspectives on the program and RLFF. But overall, we have no way of knowing whether respondents had a fear of being honest with us or not, because we were seen as a direct vector back to RLFF.

At the same time, from having interviewed many individuals in other studies, the length and richness of these interviews, with almost all of the PWC respondents providing lots of examples and reflections, suggests that their comments were honest and thorough. When probing for follow-ups that might include more criticism of RLFF's administration of the program or its overall strategy, we rarely got much response. And as noted above, even the more critical respondents were quite positive in their overall assessments of the program.

## Causality

Another challenge was disaggregating PWC investments from all other activities aimed at accomplishing an outcome. As a regranting program, this had two components: discerning whether a specific grantee was undertaking an action as a result of the PWC grant, versus other things it was or would have done; and assessing the outcome of the funded activity holding the activities of other involved parties constant. In areas like acquisitions where PWC investments were often matched by others' activities, it was relatively easy to tell whether an activity had occurred, but harder to assess whether PWC should take credit for the entire acreage protected or just the parcels whose purchase was underwritten by PWC dollars. For example, if the PWC acquisition occurred at the same time as that of an adjacent parcel that was totally funded by another funder, can PWC take credit for the combined acreage? As noted above, we tried to be fairly conservative in the way we answered this question.

In other areas, such as policy work, PWC grantees played at times small but critical roles in the advocacy and research that enabled a policy change to happen. In this case, we repeatedly asked whether an outcome described by a respondent was the result of the PWC funding and what would have happened without it. In many areas of activity, there is no way to be sure whether a marginal addition to what was already going on was transformative to the situation. In analyzing the grant history, we have tried to go as far as we can at isolating the results of the PWC investments when they are part of a system of activities in most funded organizations and places. In fact, the value added by many grants was the catalytic and strategic role that the PWC grants played in a place where a variety of activities were already ongoing.

### Challenge of Assessing the Programmatic "Forest" versus the Project-Level "Trees"

A final caveat comes from the challenge of seeing the big picture of PWC. There were clearly synergies from the interaction between grant activities. The program's impact is significantly bigger than the sum of its parts. But it was hard to assess that in part because RLFF did not publicize the magnitude of the program. Few respondents had any real clue as to the range of organizations and activities funded, often even in their region or area of activity. We will suggest that there may be significant benefits from publicizing the program and coordinating grantees, but the blinders that most grantees and observers had on the full scope of the program made it difficult to get others' assessments of just what the overall program has done for California wildlands conservation. From our vantage point of having spent a number of intense months reviewing the multiple points of activity across a diverse California landscape, it seems quite likely that the program has had a transformative effect in many ways. But few could describe the forest for the trees.

## *A Roadmap to the Report*

The report is organized as a series of sections that present the results of our attempts to answer the overarching evaluation questions described above. Sections 2 and 3 describe the program logic and the overall patterns of funding.

| Section | Topic | Key Questions |
|---|---|---|
| 2 | PWC Program Logic | What did the designers of the PWC program intend? What were the goals and objectives of the program? What strategies were seen as necessary to advance toward desired outcomes? How were these outcomes measured? |
| 3 | Snapshot of Program Activities | What activities and how many organizations were funded by the PWC program? At what cost? Where were the organizations and activities located? |

Sections 4 through 9 provide quantitative and qualitative data to answer the evaluation questions.

| Section | Topic | Key Questions |
|---|---|---|
| 4 | Grantmaking Style and Process | To what extent did RLFF's grantmaking style and process contribute to the effectiveness of the PWC program? How did it respond to changes in context and ongoing learning? |
| 5 | Land Acquisition | To what extent did PWC acquire significant elements of California's wildlands and ensure their permanent protection? |
| 6 | Capacity-Building | To what extent did PWC increase the capacity of the conservation community in California to advance wildlands protection? |
| 7 | Public Policy Change | To what extent did PWC secure public policy changes that increased wilderness and wildlands protection? |
| 8 | Constituency-Building | To what extent did PWC promote long-term political and constituency changes that make wildlands protection more likely in the future? |
| 9 | Science and Planning | To what extent did PWC generate new science and tools, an expanded set of plans, and new public processes that will guide future protection? |

We conclude the report with a section of recommendations from grantees about future grantmaking in wildlands conservation.

| Section | Topic | Key Questions |
|---|---|---|
| 10 | Directions for the Future | What do the experience with PWC and the perspectives of PWC grantees suggest about future programs for wildlands conservation and protection? |

For those who are seeking more excruciating details, we provide an appendix with supporting information about the policy work undertaken with PWC support.

| Appendix | Topic | Content |
|---|---|---|
| A | Policies Influenced by PWC Activities | A description of specific policy initiatives affected by PWC's grantees, the role played by PWC, and the current status of the initiative (as of March 2009). |

**- *2* -**

# WHAT WAS INTENDED?
# THE LOGIC OF THE PWC PROGRAM

***What did the designers of the PWC program intend? What were the goals and objectives of the program? What strategies were seen as necessary to advance toward desired outcomes? How were these outcomes measured?***

The PWC program was started in 2003 with a planning grant, which enabled RLFF to put significant effort into developing a clear program strategy. Drawing on prior experience with the CCLI program, RLFF used mapping and a variety of discussions with numerous members of the conservation community to put together a 78-page Strategy Book in 2004. Goals, objectives, strategies and activities listed in the Strategy Book, both as statewide efforts and as a set of regional priorities, provided a statement of the program's theory and logic, even though it was not put together in standard logic model form.

> *"California is a state of superlatives; no other place in America parallels the Golden State's array of natural and scenic diversity…*
>
> *"Through the Preserving Wild California Program, RLFF seeks to preserve significant elements of California's wildlands and ensure their permanent protection."*

The program received a midterm assessment in 2006 by an outside consultant who worked closely with RLFF staff to understand the range of funded activities and outcomes to date. He produced a short statement of observations and recommendations based on a review of grant documents and interviews with 15 individuals. RLFF staff also provided summaries of grant activity by region. It was a helpful process, because the magnitude of the day-to-day grantmaking had made it difficult to "see the bigger picture," according to one staff respondent. "We were simply too close to the effort to be able to step back and take an objective look." While some strategies were called into question, most were affirmed in this assessment. Some new strategies were suggested – working lands, urban rivers – and PWC staff developed two thoughtful memos about ways to advance work with Latino constituencies in the South Coast and Central Valley. The Strategy Book itself was not revised, though the working ideas within it were adjusted in the minds of RLFF staff.

In this section, we review the PWC program strategy as a foundation for the assessment. To clarify the program logic as a baseline for evaluation, we developed a simple logic model that arrays threats and opportunities, activities, intermediate outcomes and ultimate outcomes. That diagram is included as Figure 2.1.

## *An Ambitious but Clear Set of Goals and Objectives*

*2.1 RLFF staff articulated an ambitious but reasoned list of long term goals for the PWC program, with a fairly clear set of multifaceted statewide and regional objectives.*

The Strategy Book identified six overarching goals, eight statewide objectives, and seventeen regional objectives. The program was clearly intended to be broad-ranging, both geographically and in the activities it funded, and transformative in taking advantage of what was seen as a historic opportunity to secure wildlands protection before it was "too late." The objectives seemed well-matched to the threats evident in the specific regions. Indeed, we could find no one to criticize the overall scope of the program; rather some would have liked it to expand to some other areas of activity, without cutting any planned elements. The fact that many respondents indicated that "more of the same" was their overall recommendation if another round of funding was provided, speaks to the validity of the initial strategy.

There appears to be some ambiguity about ultimate outcomes sought by the program, and this was confirmed in interviews. Did the program seek wildlands protection in order to protect biological diversity, key ecosystem processes, large blocks of undeveloped open space, recreational opportunities or aesthetic or spiritual values? Depending on which of these were priorities, strategies might have been different around the margins of the program. If functioning systems were the objective, then greater levels of restoration might have been envisioned. If development pressures were truly one of the major stressors for the program, then more work in high growth areas affecting the quality of protected lands – such as the Central Valley and the Sierra Foothills -- might have been targeted to a greater extent.

Finally, some emergent threats such as climate change were not discussed in the 2004 Strategy Book. Indeed, neither climate change nor global warming was mentioned in the Strategy Book, and program officers acknowledged that climate change "really wasn't on people's radar screens originally." Hence, dealing with these threats was not part of the initial goals and objectives, except implicitly, for example, by dealing with wildfire threats. Intact protected wildlands help provide corridors and buffers that are important elements of climate change adaptation, but these connections were not explicit in the 2004 Strategy documents. In the 2006 midterm assessment report, consultant Kevin Sweeney noted that "Climate change is an ascendant issue, and has important implications for wilderness preservation as a political issue." Nevertheless, the RLFF memo sent as a cover sheet to the Sweeney reports did not highlight climate change as a major crosscutting theme or issue.

The goals and objectives of the PWC program as detailed in the 2004 Strategy Book are as follows. They are translated into logic model form in Figure 2.1.

### *Long term goals*

- Secure, through acquisition and new policy designations, permanent protection for one million acres of California wildlands;

- Build new constituencies that will sustain support for wildlands preservation over the next generation;
- Maintain and strengthen the state and federal laws, regulations, and policies that protect California wildlands;
- Shift the focus of public agencies and private organizations towards agreed upon priority areas and the permanent protection of key wildlands;
- Expand the capacity of selected conservation organizations to undertake their work in preserving wildlands; and
- Functionally complete existing protected areas.

## *Objectives*

### **Statewide Objectives – Federal Policy**

- Permanently protect important California landscapes through new federal designations.
- Maintain the integrity of federal laws and policies that protect California wildlands.
- Develop the public support and constituency necessary to accomplish PWC objectives in acquisition, policy advocacy, and restoration.
- Secure additional federal appropriations that provide new opportunities to preserve critical California wildlands.

### **Statewide Objectives – State Policy**

- Provide new opportunities for wildlands conservation through increased state appropriations and bond funding.
- Secure permanent protection for state-owned wildlands.
- Secure new state policies that further protection for privately-owned wildlands.
- Develop new sources of revenue for effective management of state conservation lands.

### **Regional Objectives – North Coast**

- Enhance recovery of salmon and steelhead by focusing acquisition, restoration, and planning projects in key watersheds.
- Conduct additional planning to identify opportunities and strategies for preserving and restoring priority forest areas that are in ownership transitions.

### **Regional Objectives – Modoc**

- Develop a stronger conservation constituency by supporting acquisition, restoration, policy, and planning projects that will help build support for wildlands conservation.

### **Regional Objectives – Sierra Nevada**

- Develop effective strategies to address public concern over wildfire.
- Increase public funding for wildlands conservation.

- Acquire key holdings within priority areas on the eastern slope of the Sierra.
- Create a landscape approach to conservation within priority watersheds on the west slope.
- Enhance the capacity of organizations and the constituency within the region.

**Regional Objectives – Central Valley**

- Develop new and stronger constituencies for wildlands protection, especially within the region's growing Latino community.
- Secure additional public resources for the protection and restoration of key migratory bird habitat that fit into larger, well-established plans.

**Regional Objectives – Central Coast**

- Create significant protection for the inner Coastal Range.
- Secure protection for Fort Hunter Liggett and neighboring lands.
- Determine opportunities for greater preservation of resources in threatened parts of the southern Los Padres National Forest, Carrizo Plains, and Gaviota Coast.
- Define and advance scientific needs and management actions for protecting and restoring native oaks and grasslands.

**Regional Objectives – South Coast**

- Support outreach and education necessary to develop a strong constituency for wildlands conservation efforts, including land use initiatives, management plans, and funding measures

**Regional Objectives – Desert**

- Complete the vision of the California Desert Protection Act by acquiring inholdings and grazing privileges within protected areas.
- Acquire key holdings and craft plans to protect the region's two great rivers.

## *Six Major Types of Grantmaking Strategies*

*2.2 RLFF identified a set of specific strategies to be used in grantmaking. These include a mix of items related to the strategic thought process involved in grantmaking along with the substantive activities carried out by grantees. Overall six major categories of activities can be viewed as the overarching strategies used by the PWC program to pursue its outcomes.*

The Strategy Book identified a set of overarching program strategies. These were:

- Achieve tangible results in protecting key wildlands in ways that assure their integrity over time;
- Provide new tools to public agencies and private organizations that will further wildlands preservation efforts;

- Conduct planning and identify flagship projects in key regions that will attract public funding and catalyze future wildlands conservation efforts;
- Address future needs and threats, as well as immediate ones;
- Build sustainable, strong constituencies for wildland protection throughout the state;
- Catalyze, create, and identify innovative approaches and priorities as well as respond to emerging opportunities;
- Collaborate with various interests and build on existing efforts; and
- Take reasonable risks in investing in groups and projects that could become new models for success.

Some, such as providing tools to agencies and building constituencies, can be seen as the strategies used by grantees to achieve on-the-ground change. Others, such as taking reasonable risks in investing, are the strategies used by RLFF in administering the program.

Operationally, grantee strategies broke down into five strategies to be carried out by funded organizations. These categories were used to track grants in the PWC grant database, and we use these categories to report on aggregate patterns of funding. In the Logic Model and our analysis, however, we split long-term constituency-building into a separate category because it tended to focus on different activities and target groups than was the case in the shorter policy campaigns, such as mobilization of grassroots supporters for specific pieces of legislation. Indeed, PWC staff appeared to have started viewing it as such and developed separate strategy memos on constituency-building in the middle of the program. As a result, the program can be seen as having six major types of grantmaking strategies:

- **Acquisition.** Acquiring land and ensuring its protection through transfers to public agencies with restrictions on future use
- **Capacity-Building.** Building the capabilities of conservation organizations.
- **Policy.** Changing public policies through change in laws and administrative programs and building short term constituencies for protective action.
- **Constituency-Building.** Developing a long term constituency for wildlands conservation through outreach to nontraditional groups.
- **Planning and Science.** Creating new information, plans and planning processes that will promote wildlands protection.
- **Restoration.** Restoring ecosystem processes in key areas

Critically important yet hard to see through the logic model are the interconnections that create synergies between strategies. Most of the major grants recognized this explicitly, and RLFF staff clearly thought in these terms as decisions were made about how to move toward outcomes. Hence, many groups received multiple kinds of grants. For example, some like the MDLT received both acquisitions and capacity-building grants, recognizing that a successful land deal would build credibility and capacity of the land trust, while at the same time, the ultimate success of conservation in the landscape around the acquisition would depend on viable organizations monitoring the status of the acquired land and continuing protective action on other parcels. As we describe in Section 4, this use of multiple, interconnected strategies was a hallmark of the program and was extremely successful.

## *A Set of Quantitative and Qualitative Measures of Success*

*2.3 The PWC Strategy Book identified a set of specific metrics to be used in a qualitative and adaptive manner for assessing the progress of the program.*

RLFF recognized the need to translate broad statements of goals and objectives into more measurable form to facilitate ongoing assessment and evaluation. They recognized that the goals and objectives were “qualitative rather than quantitative,” and were “intended to identify the overall direction, focus, and priorities for PWC and to generate further discussion and refinement.” The last section of the Strategy Book contained a section entitled, “Measuring Success,” which pushed many of the goals into “quantitative benchmarks that can be used to evaluate PWC’s success in reaching each of its stated program goals.” In RLFF’s view, these metrics were “intended to stimulate thinking, strategic directions, and specific projects and not as the definitive measures for evaluating the progress.”

Nevertheless, these metrics do provide a fairly good lens to use to evaluate the program, with the caution that day-to-day grantmaking was – and was intended to be -- strategic and adaptive within the overall guidelines of the Strategy Book. According to the Strategy Book, “Though desirable, it is not possible to predict with certainty the tangible program outcomes over a five-year period. Thus, it is anticipated that these measures will be reviewed annually and revised accordingly in order to set ambitious, reasonable benchmarks to evaluate the program’s progress.” It is not clear whether the metrics were ever updated as an overarching evaluation framework, though particular segments of the PWC program – like the Latino constituency building activities -- were revised deliberately after the midterm assessment. As discussed in Section 4, day-to-day grantmaking involved a significant amount of strategic thinking on the part of program officers and grantees, and one of the hallmarks of the program was its strategic, adaptive and flexible style, with adequate check-backs to the Strategy Book and funder intent.

The measures of success outlined in the Strategy Book are reprinted below. When comparing them against the overall logic of the program, they provide a very reasonable mix of activity measures (e.g., develop 3-5 planning projects), intermediate term impact measures (e.g., increase poll results in voter attitudes; secure $1 billion in conservation funding) and longer term outcome measures (e.g., wilderness designated on 1 million acres). Less well-defined are the ultimate outcome measures, such as changes in ecosystem health, but these would also be the least visible in the five-year program cycle. Most items that can be thought of in quantitative terms had quantitative targets associated with them. While reporting processes may not have linked outcomes to these metrics as explicitly as possible – for example, through a “report card”-like process – the metrics contained in the Strategy Book provide a well-articulated and clear template for success.

**Statewide Objectives – Federal**

- Permanently protect important California landscapes through new federal designations.
- Secure wilderness designation for 10-20% of remaining unprotected wildlands. (Approximately 750,000-1.5 million acres)
- Maintain the integrity of federal laws and policies that protect California wildlands.
- Prevent RS 2477 claims from being validated in California wildlands.
- Protect the integrity of the Sierra Nevada Framework Plan.
- Secure wildlands conservation in the southern California national forests management plan amendment.
- Develop the public support and constituency necessary to accomplish PWC objectives in acquisition, policy advocacy, and restoration.
- Develop and distribute information on public opinion, effective conservation messages and messengers, and background on elected officials to key conservation organizations.
- Increase poll results in voter attitudes toward wildlands preservation.
- Create more vibrant wildland advocacy organizations through leadership training, board development, diversified funding, and strategic plans.
- Secure additional federal appropriations that will provide new opportunities to preserve critical California wildlands.
- Secure $50-100 million in new federal appropriations for wildlands conservation, including funding from the Land and Water Conservation Fund.
- Develop 5-10 projects that develop partnerships between PWC grant recipients and federal agencies to further wildlands conservation.

**Statewide Objectives – State**

- Provide new opportunities for wildlands conservation through increased state appropriations and bond funding.
- Secure $1 billion in new state conservation funding.
- Secure permanent protection for state-owned wildlands.
- Secure wilderness designation for 50,000-75,000 acres of state land.
- Secure new state policies to ensure that conservation lands are maintained and managed for conservation purposes.
- Secure new state policies that further protection for privately owned wildlands.
- Secure new incentives for wildlands conservation in local land use plans.
- Develop new sources of revenue for effective management of state conservation lands.

**Regional Objectives – North Coast**

- Enhance recovery of salmon and steelhead by focusing acquisition, restoration, and planning projects in key watersheds.
- Protect 50,000-75,000 acres of wildlands through acquisition or conservation easements, with a focus on important anadromous fish streams and their headwaters, and projects that can return clean, cold water to salmon-bearing streams.
- Conduct additional planning to identify opportunities and strategies for preserving and restoring priority forest areas that are in ownership transitions.
- Develop strategies, including a multifaceted conservation approach, that can be used as a model for transactions affecting large, industrial holdings.
- If applicable, deploy the model to 1-2 projects affecting large timber holdings.

**Regional Objectives – Modoc**

- Develop a stronger regional conservation constituency by supporting acquisition, restoration, policy, and planning projects that can help build support for wildlands conservation.
- Support 2-3 conservation projects that can generate local support (or, at a minimum, neutrality) among locally elected officials and significant constituent groups and support education and outreach efforts tied to these projects.
- Conduct 2-3 research projects that can help facilitate regional conservation projects and constituency building efforts.
- Support 2-3 new outreach positions within the region.

**Regional Objectives – Sierra Nevada**

- Develop effective strategies to address public concern over wildfire.
- Secure a 25% increase in funding for environmentally sound fuels reduction projects.
- Facilitate a 10-20% increase in the annual acreage treated by prescribed fire and brush removal.
- Develop three new credible spokespeople for environmentally sound fuels reduction projects.
- Increase public funding for wildlands conservation.
- Establish a new state conservancy that can attract public dollars.
- Develop 3-5 planning projects that will facilitate increased public investment in acquisition and/or restoration.
- Develop 3-5 acquisition projects that can attract additional public resources.
- Acquire key holdings within priority areas in the eastern Sierra.
- Protect 2,500-5,000 acres of land through acquisition or conservation easements.

- Create a landscape approach to conservation within specific watersheds on the west slope.
- Protect 20,000-40,000 acres of land through acquisition or conservation easements.
- Initiate two landscape level conservation plans.
- Enhance the capacity of organizations and the constituency within the region.
- Build the capacity of 5-7 key organizations.
- Develop 3-5 projects designed to expand the constituency for Sierra conservation.

**Regional Objectives – Central Valley**

- Develop new and stronger constituencies for wildlands protection, especially within the region's growing Latino community.
- Develop, distribute, and facilitate the implementation of information on public opinion, effective conservation messages and messengers, and elected officials by key conservation organizations.
- Measurably increase poll results among key constituencies for wildlands preservation.
- Secure additional public resources for the protection and restoration of key migratory bird habitat that fit into larger, well-established plans.
- Secure $50-100 million in new federal funding for wildlands conservation and restoration projects.
- Develop and support 3-5 new projects that can attract federal dollars.

**Regional Objectives – Central Coast**

- Create significant protection for the inner Coastal Range.
- Protect 50,000-75,000 acres of land through acquisition and conservation easements.
- Secure protection for Fort Hunter Liggett and neighboring lands.
- Determine opportunities for greater preservation of resources in threatened parts of the southern Los Padres National Forest, Carrizo Plains, and Gaviota Coast.
- Define and advance scientific needs and management actions for protecting and restoring native oaks and grasslands.

**Regional Objectives – South Coast**

- Support outreach and education necessary to develop a strong constituency for wildlands conservation efforts, including land use initiatives, management plans, and funding measures.
- Develop, distribute, and facilitate the implementation of information on public opinion, effective conservation messages and messengers, and elected officials by key conservation organizations.
- Measurably increase poll results among key constituencies for wildlands preservation.

## Regional Objectives – Desert

- Complete the vision of the California Desert Protection Act by acquiring inholdings and grazing privileges within protected areas.
- Acquire 50,000-75,000 acres of private land within, and adjacent to, protected areas.
- Eliminate grazing on 250,000-500,000 acres of land within focus areas.
- Prioritize water rights acquisitions and restoration projects for the region's two great rivers. Acquire key holdings and begin implementation of restoration plans.
- Acquire 5,000 acres of private land.
- Develop two restoration and water rights acquisition plans.

## Problems/threats

**Rapidly increasing population**

**Problematic patterns and rising levels of land and energy development and water use, leading to habitat fragmentation and destruction**

**Insufficient and misdirected political leadership**
- Anti-environmental Congressional committee leadership & Administration
- Local government officials

**Public that is less in touch with nature**

## Assets

**Biological richness of CA landscape, with most protected land of any state**

**Window of opportunity and significant private funding for expanded protection**

**Considerable existing capacity within the conservation community, as well as many nodes of potential activity**

**Political leaders and groups of voters at the state and federal levels supportive of wilderness and wildlands protection**

**RLFF staff experience with multi-strategy, conservation-directed re-granting program**

## Key Strategies

**Acquire land and place into protected status**
- Inholdings in protected areas
- Parcels adjacent to protected areas
- Parcels in Wilderness Study Areas to enhance likelihood of wilderness designation
- Priority forest areas in ownership transition

**Restore ecosystem processes in key areas**
- Salmon-bearing streams in the North Coast
- Wildfire risk reduction in the Sierra
- Road removals in Desert

**Promote policy changes through lobbying, grassroots mobilization and negotiation**
- Pass Federal & State wilderness and wild & scenic river bills
- Expand Federal & state conservation funding
- Assure effective public lands mngt policies
- Avoid "bad changes" to existing policies (Sierra Nevada Framework, RS2477, etc)

**Build constituencies for future action**
- Carry out outreach and education with nontraditional groups (Latinos, hunters, anglers, Republicans, local commercial interests, etc.)

**Develop information and plans to guide and motivate action**
- Carry out scientific research
- Develop landscape assessments and tools
- Support planning at local and regional levels
- Encourage effective planning processes

**Build organizational capacity**
- Conduct organizational assessments
- Coach/mentor groups by providing access to consultants and through staff input
- Provide project-specific as well as unrestricted funding for core staffing, strategic planning and fundraising
- Develop networks (CCLT, CWHC, etc)

## Intermediate Outcomes

**Improved conditions and mitigated threats**
- Development pressures
- Habitat conditions
- Climate change
- Political opposition

**Improved and expanded policies**
- Wilderness designated
- More sustainable public land mngt
- New funding sources
- Integrity of existing laws maintained

**Long term direction supported by a broader set of constituencies**
- Nontraditional groups, especially Latino populations
- Bipartisan political leadership

**Greater understanding, buy-in and direction associated with key issues and protection strategies**

**More effective conservation organizations**
- Land trusts
- Advocacy groups
- Networks and coordination

## Ultimate Outcomes

**Expanded set of protected wildlands in California**
- Biodiversity
- Functioning corridors and landscapes
- Wilderness and wildness
- Recreation
- Spiritual and aesthetic values

Ecosystem Management Initiative

Situation Map template created by the Ecosystem Management Initiative, School of Natural Resources & Environment, The University of Michigan
For more information: www.snre.umich.edu/emi

**Figure 2.1**
**Preserving Wild California Program Logic Model**

# - 3 -

# WHAT WAS FUNDED?
# A SNAPSHOT OF PROGRAM ACTIVITIES

***What activities and how many organizations were funded by the PWC program? At what cost? Where were the organizations and activities located?***

The strategies described in Section 2 were translated into specific grant-funded activities by RLFF program officers over the six years of the program's grantmaking. Collectively, these activities produce the outcomes that will be evaluated through the rest of the assessment report. In this section, we provide a visual summary of the activities funded by the program, recognizing that dollars spent and grants made do not directly produce outcomes, such as wildlands conservation and protection. Nevertheless they are an indicator of activity, and it is clear that the PWC staff and grantees were busy.

*From late 2002 to March 2009, RLFF awarded 453 PWC grants to 165 organizations, totaling $159 million. Grants utilized $150 million of donated funds and $9 million of interest earned on those funds.*

More than 450 grants were made to greater than 160 organizations. All regions saw activity (Figure 3.1), though more funds were spent on the Desert and the Sierra than any other regions. Acquisitions received the lion's share of the funding, though more grant activity occurred in other program areas, particularly the policy and capacity-building areas. Multiple kinds of activities were carried out in all regions, and at least ten organizations were funded in each region. More acquisitions were funded early in the program, while more capacity-building grants were funded later in the program. A significant amount of non-PWC money was leveraged as a result of the grants, with PWC providing roughly 39% of total project costs.

The data on activities that we used to develop the graphs and tables in this section was taken from the PWC grants database, slightly cleaned up. The acquisitions information was drawn from our parcel-level analysis and is discussed further in Section 5.

Some caveats: Not all grants were coded in the same or a consistent way, and many grants do not fit nicely into regional or project type classifications. For some data items, grants were coded into multiple categories so it is hard to develop summaries of activities that are mutually exclusive of each other. Grants coded as Statewide often had impact within regions, but there is no way to apportion the funds accordingly.

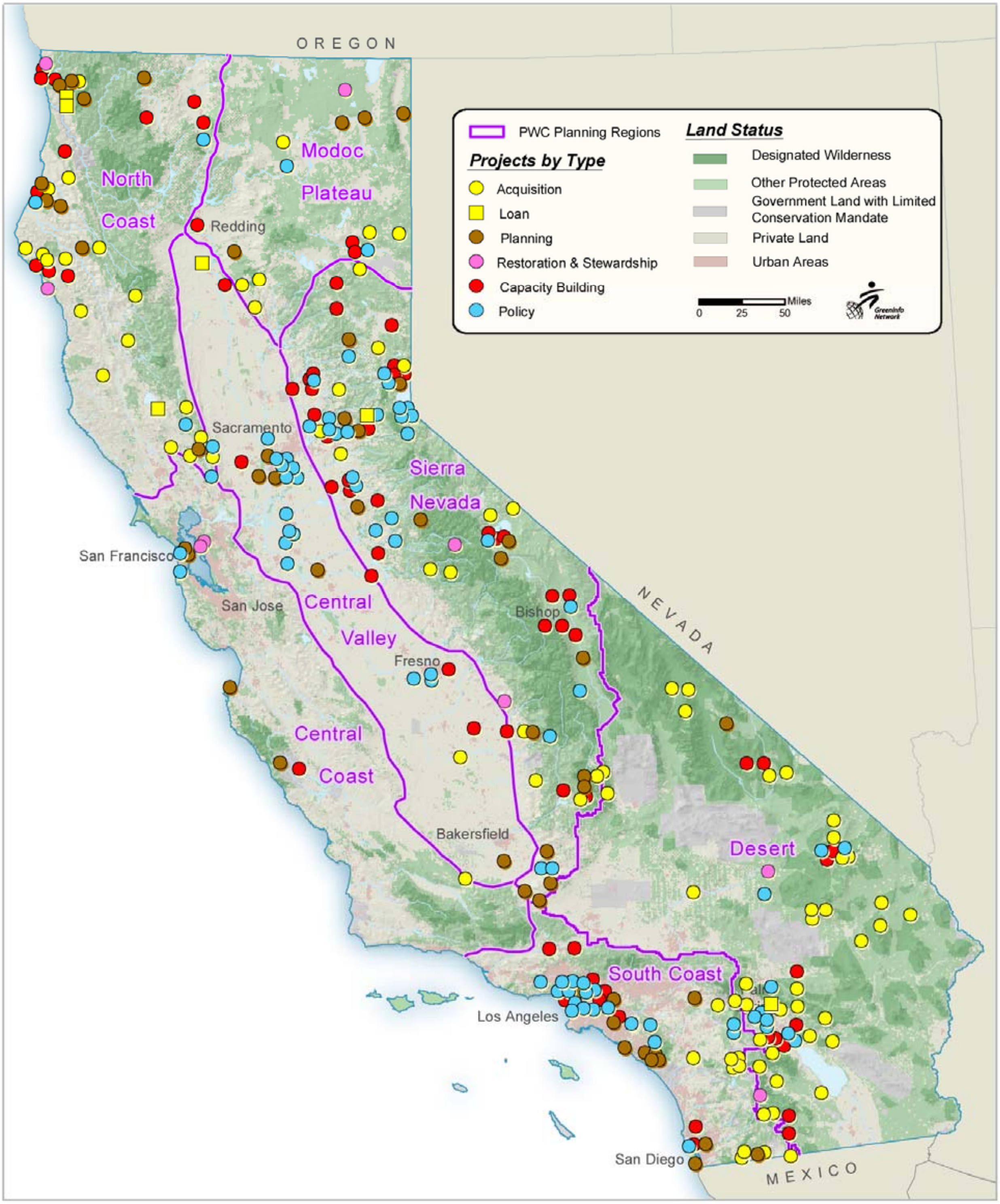
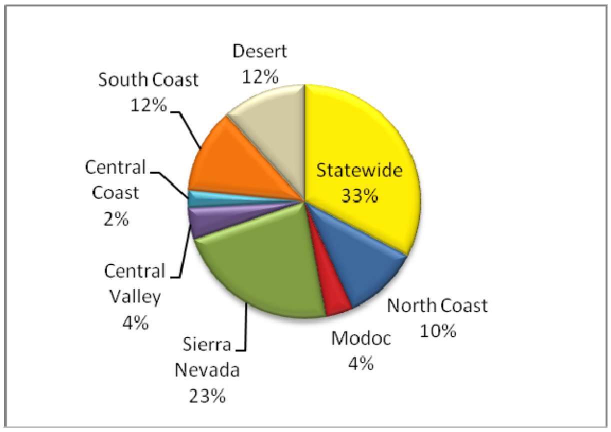



***Figure 3.1: Location of projects/grantees funded by the PWC program***

## *How were funds distributed by region?*

*3.1 While grants were distributed broadly across all seven regions of California, the largest portion of the PWC funds went to Statewide projects, the Sierra Nevada and the Desert. The lowest amount of funding went to the Modoc, the Central Valley and the Central Coast.*



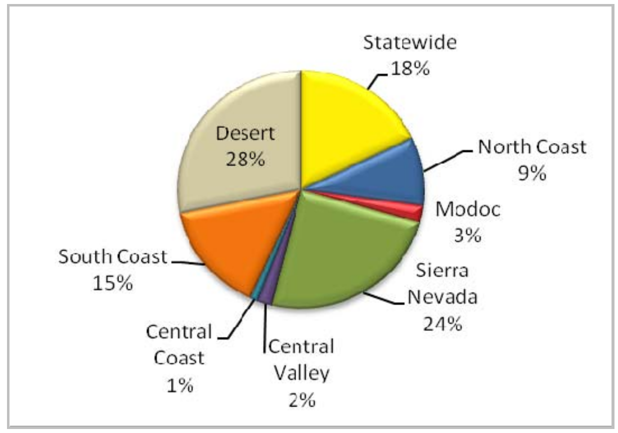
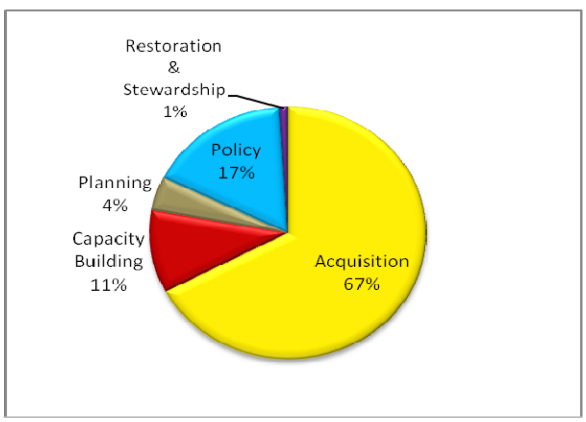




***Fig. 3.2: Percent of funds awarded by region***

***Fig. 3.3: Percent of grants awarded by region***

## *How were funds distributed by type of project (strategy/activity)?*

*3.2 While two-thirds of the funding went to acquire land, more individual grants were made for policy development (175 grants) and capacity-building (104 grants). Very little funding or grants were made for restoration and stewardship purposes.*



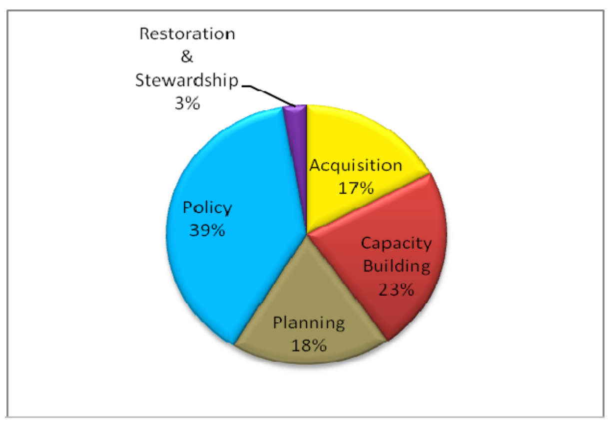




***Fig. 3.4: Percent of funds by project type***

***Fig. 3.5: Percent of grants by project type***

## *How were funds distributed by region and type of project?*

*3.3 All project types were funded in each region, except for restoration and stewardship. The Desert, North Coast and South Coast were acquisition-heavy, while the Central Valley was policy-heavy (involving constituency-building activities).*

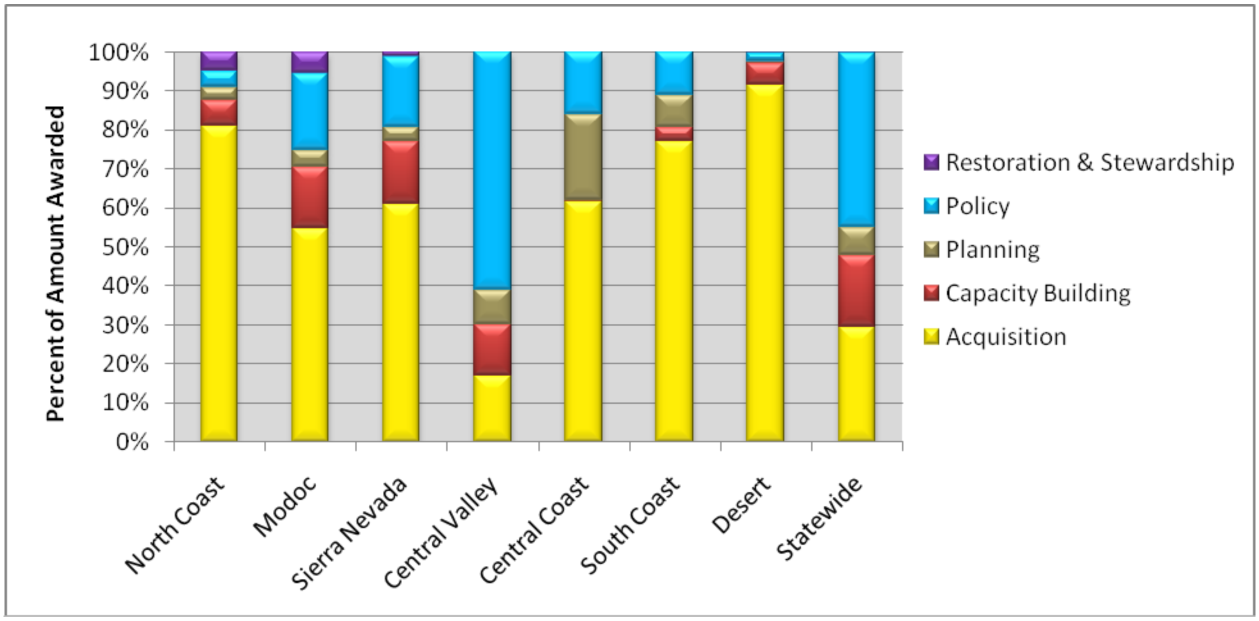



***Figure 3.6: Percent of funds awarded by region and project type***

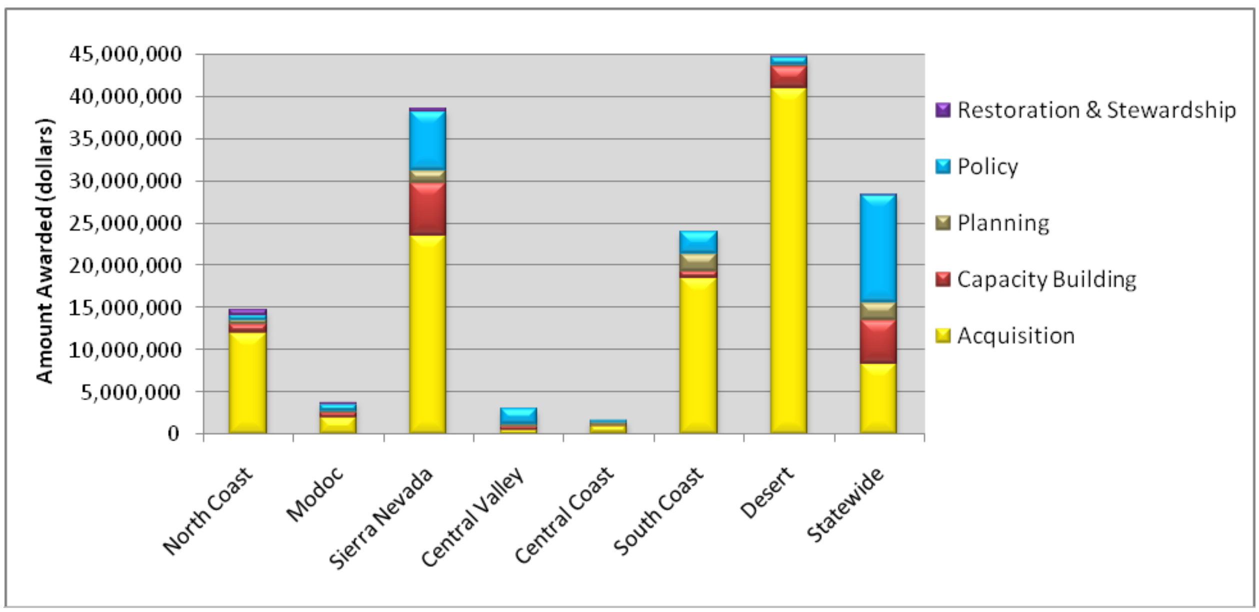



***Figure 3.7: Amount of funds awarded by region and project type***

## *How many acres were acquired?*

*3.4 Between 142,000 and 202,000 acres were acquired with at least partial PWC funding, depending on what one counts. The largest number of grants and proportion of acquired acres was in the Desert region (59,754 acres), followed by the North Coast (38,111 acres) and Sierra Nevada. (26,736 acres). A more moderate amount of land was acquired in the Modoc and the South Coast, with very little acreage acquired in the Central Valley and Central Coast. These regional patterns generally matched PWC's different goals for each region except in the Central Coast where acquisition fell most short of expectations.*

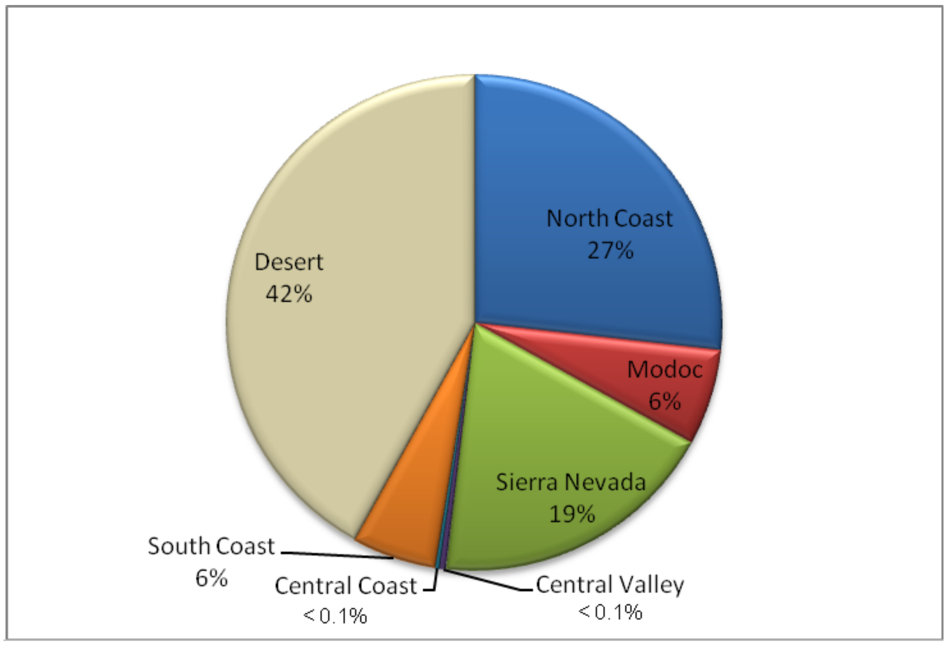



***Figure 3.8: Distribution of acquired acreage across PWC regions***

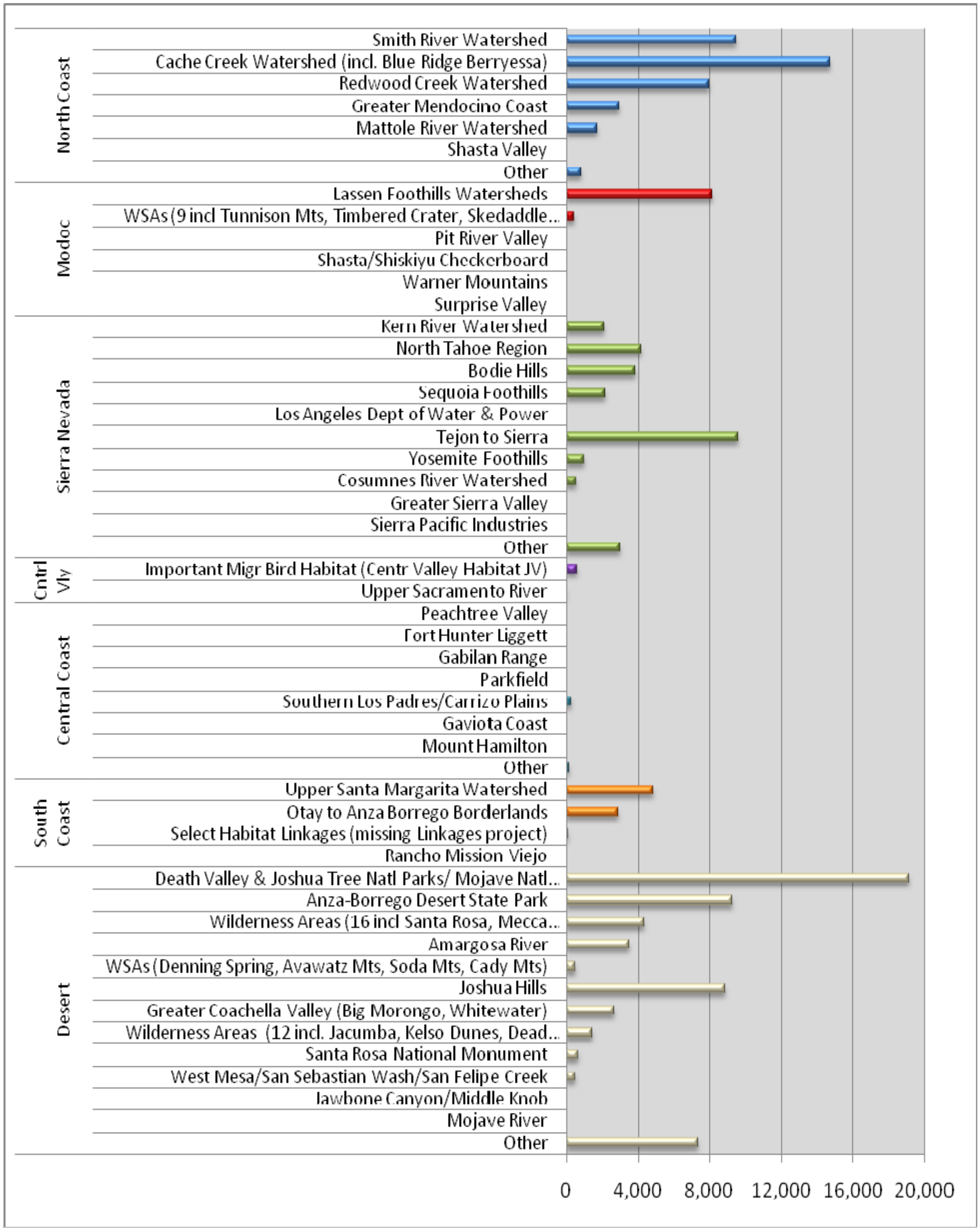



***Figure 3.9: Amount of acquired acreage distributed by PWC focal areas***

## *How much did it cost? How well were funds leveraged?*

*3.5 Not surprisingly, acquisition projects were the most costly per grant, averaging $1.4 million each. Capacity-building, policy and restoration grants averaged $130,000 to $165,000 while planning grants cost on average $80,000. The program leveraged a considerable amount of additional investment, with PWC providing on average 39% of total project costs, though 40% of the grants were funded totally by PWC.*

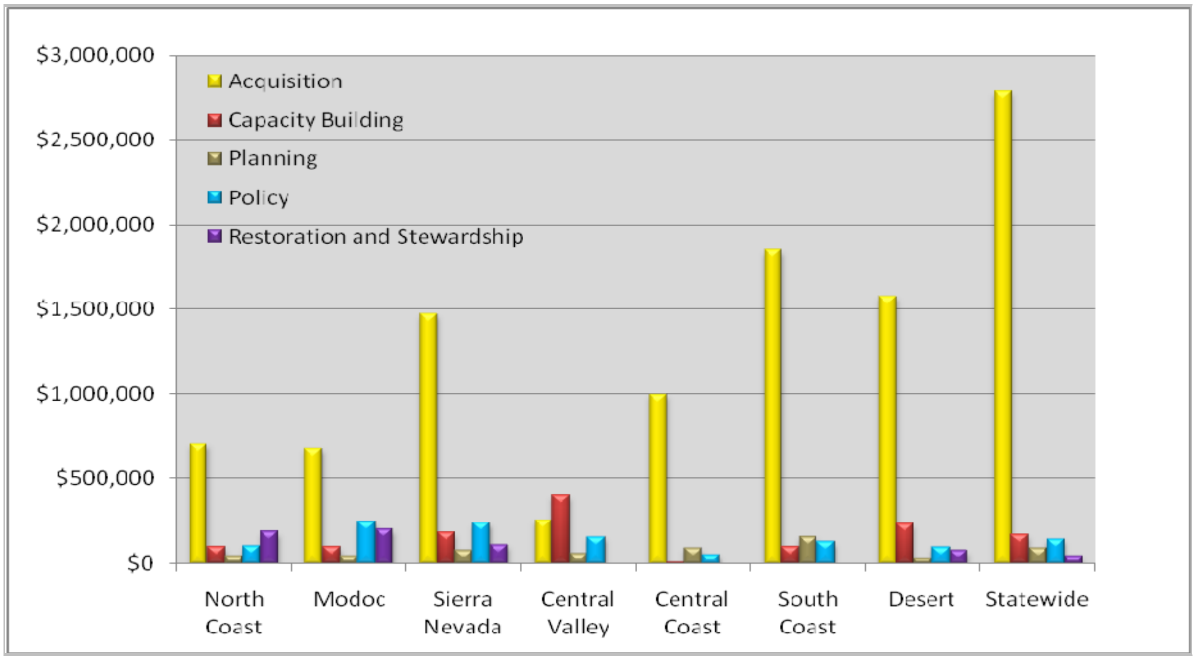



**Figure 3.10: Average dollar amount of grant by region and project type**

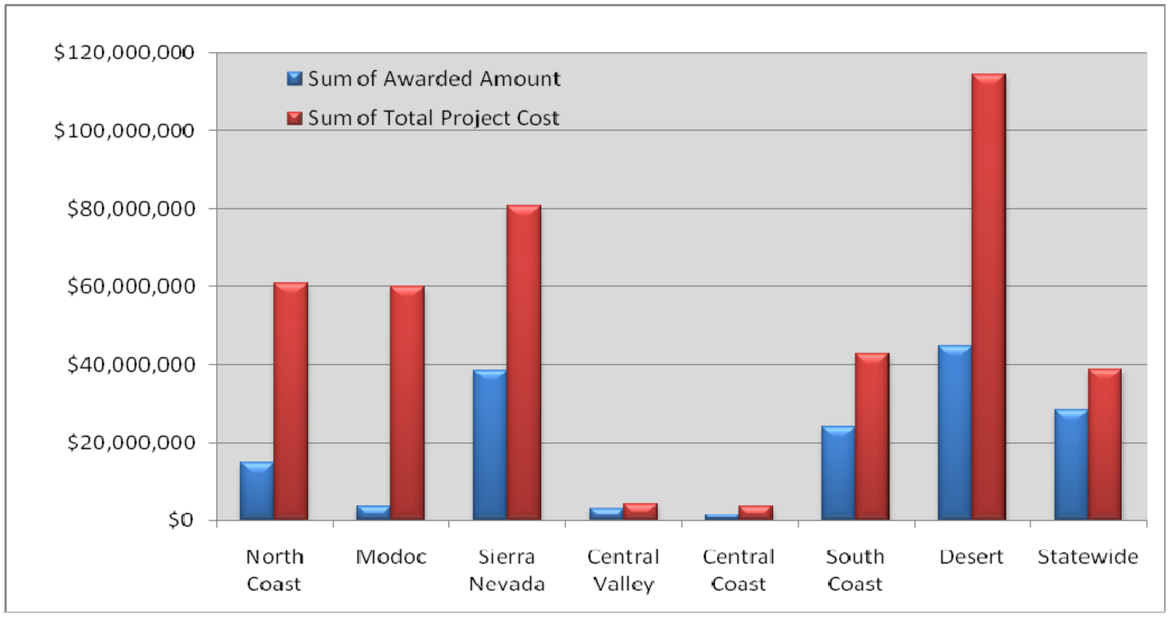



**Figure 3.11: Relationship between grant amount and total project cost by region**

## *How were funds distributed across organizations?*

*3.6 More than 160 organizations and consultants received PWC funding, and more than half received two or more grants. On average, between 10 and 20 organizations received support in each of the PWC regions, with larger numbers in the Sierra Nevada and the South Coast*

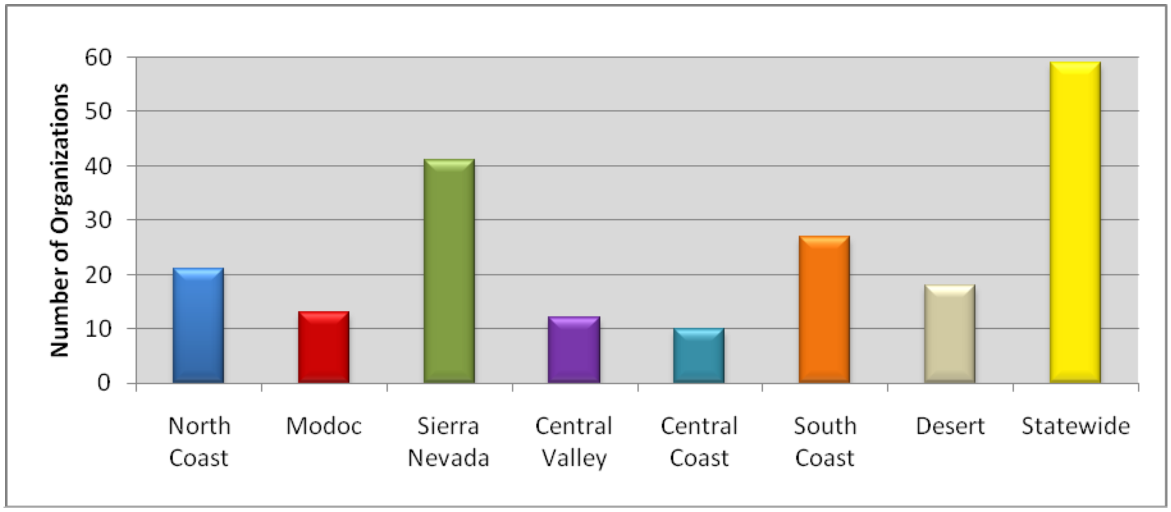



**Figure 3.12: Number of organizations receiving PWC grants by region**

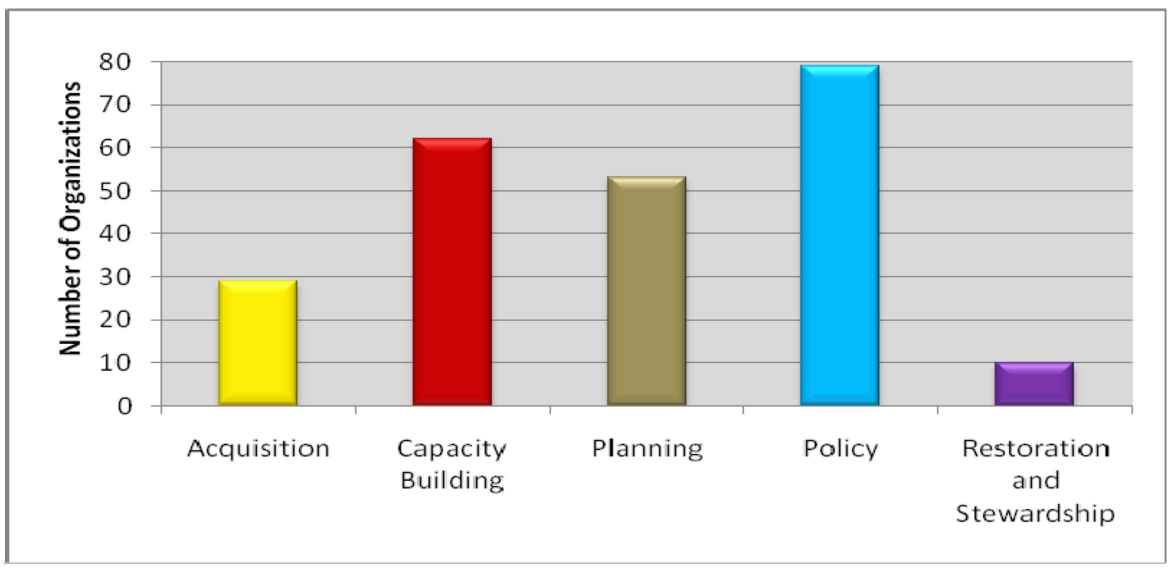



**Figure 3.13: Number of organizations receiving grants for different types of PWC projects**

*Note: Numbers sum to more than 165 because some organizations were funded to work in multiple regions and on different types of projects*

*How did grant making vary over the five years of the program?*

*3.7 The PWC program shows a consistent level of approximately $30 million in grantmaking per year, ramping up in 2003 and down in 2008. More acquisition grants were awarded early in the program, with additional capacity-building grants awarded later.*

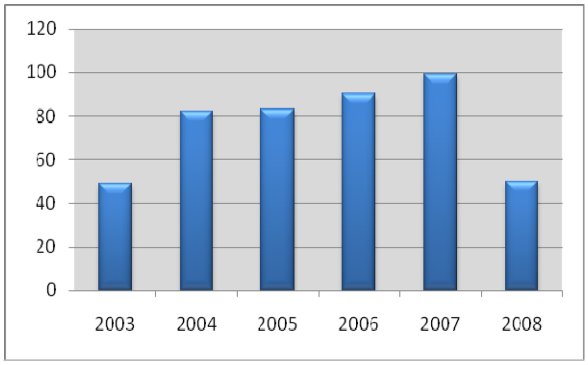



**Fig. 3.14: Number of grants awarded by year**

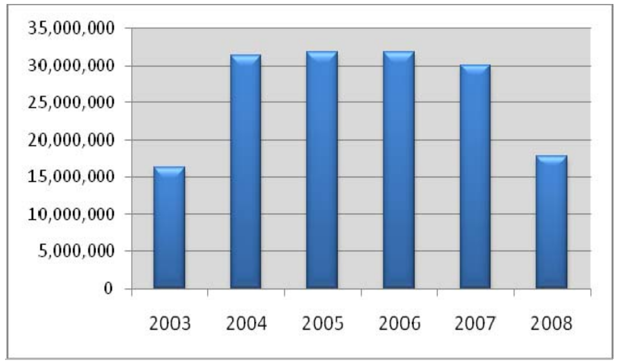



**Fig. 3.15: Total $ amount awarded per year**

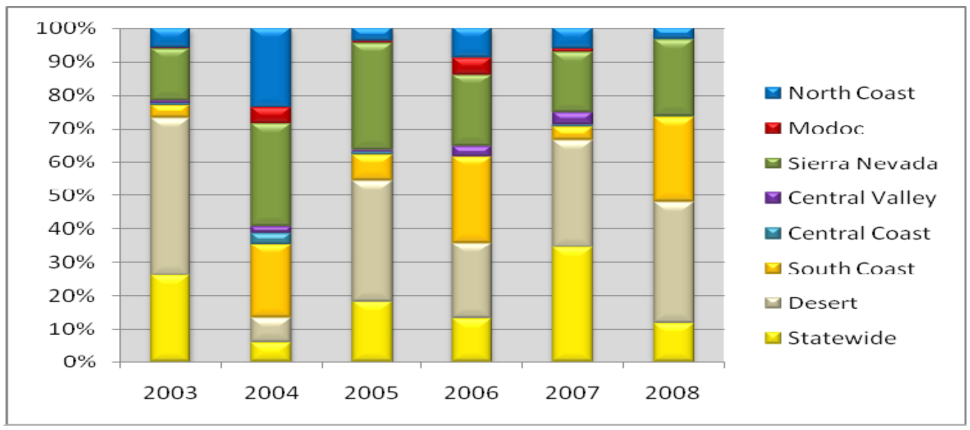



**Figure 3.16: Total $ amount awarded per year by region**

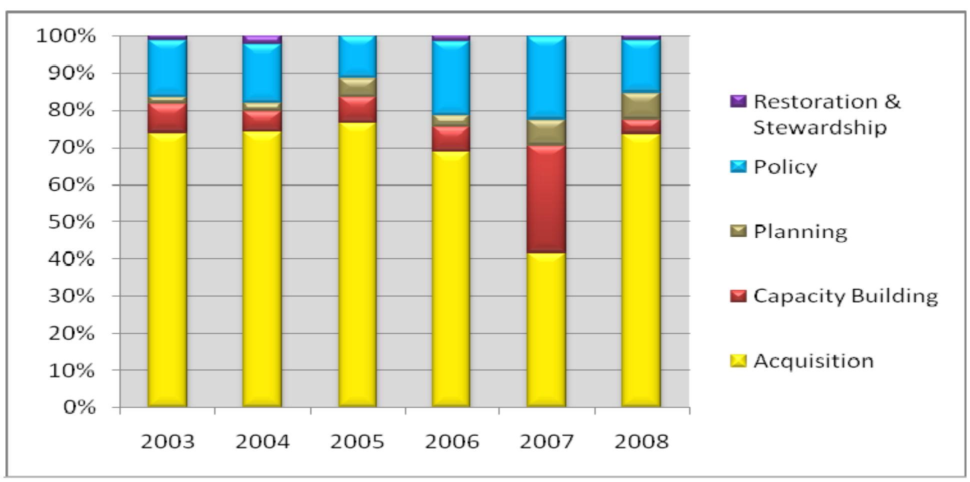



**Figure 3.17: Total $ amount awarded per year by project type**

# - 4 -

# GUIDING AND ADMINISTERING THE PWC PROGRAM

***To what extent did RLFF's grantmaking style and process contribute to the effectiveness of the PWC program? How did it respond to changes in context and ongoing learning?***

To be effective, a $150 million program administered through more than 450 grants to roughly 160 organizations over more than 5 years requires a considerable amount of effort on the part of grantmakers simply to be financially accountable. Yet by all accounts, RLFF's administration of the program went well beyond financial accountability. Indeed, one of the potentially enduring benefits of the program lies in its style of grantmaking. As one respondent suggested, "Foundations would be smart to replicate this model for other issue areas because while they think a lot about programs, they don't provide analogous outreach to Congress or Sacramento. … RLG has established a niche on the Hill and in Sacramento where they're trusted. … I've never seen anyone that has brought money to the table to do good things and all this expertise to get it done, who aren't acting out of self-interest. I'm not aware of anyone else playing this role in this way."

*"It was all about opportunities."*

*"I'd like to see it done in other parts of the country – these sophisticated focused initiatives dealing with land use and conservation. It's the first thing I've ever seen like that in the foundation world."*

With only a few exceptions, noted below, interviewees lauded RLFF's style of grantmaking – the competence of staff and consultants, the way they conceived the program's strategies, the way they sought organizations to fund, and their approaches to supporting and stewarding their grantees toward specific conservation goals. While there is room for improvement in grant reporting and coordination of grantees, RLFF's "strategic opportunism" approach appears to have been extremely effective for achieving conservation outcomes and building a stronger conservation infrastructure in California.

## Program Planning: A Strategic Approach

*4.1 RLFF planning for the PWC program was extremely thoughtful and strategic, and drew on a clear theory of action developed through a significant amount of pre-grantmaking work on prioritizing areas for protection based on science and politics.*

When asked what characterized the PWC style of grantmaking, interview respondents almost universally indicated that it was both thoughtful and strategic. Several respondents described the approach as "strategic opportunism," defining strategic as "keeping focus on specific conservation outcomes" while "knowing how to fit the pieces together to get there" and opportunism as being "willing to take risks and experiment" and take advantage of changes in context and other opportunities that appeared along the way.

## Framing the Strategy

Certainly the initial program strategy as captured in the 2004 Strategy Book reflected a great deal of thought and due diligence, even though it was developed fairly rapidly to enable the 5-year program to get underway. The program benefited from having been built on the foundation of the previous CCLI and CCMI programs funded by the Packard Foundation. CCLI's focus on specifically-defined geographic landscapes, RLFF's prior work with grantees on specific projects, RLFF's preexisting relationships with several key consultants, and the development of a fairly well-honed grantmaking process all aided the PWC program's effectiveness. Indeed, it gave the initial program some traction since RLFF had projects in the pipeline that fit PWC objectives. The leadership of RLFF and its consultants also had strong preexisting connections with networks of influential people in California policy and conservation, which were used to promote a number of PWC projects.

But PWC clearly went beyond the scope of CCLI in its statewide scale, the range of policies it would deal with, and the program's focus on wilderness and public lands as opposed to less "pure," working landscapes. With the expansion in scope, RLFF staff and funder consultants did considerable work in defining an appropriate agenda. As one respondent noted, "You weren't able to do everything in all regions statewide, so we looked at what regions, what focus areas, what subregions made the most sense based on capacity on the ground, threats, biological or wilderness values and significance. Places we thought we could get something done in five years, but also places where we thought we could get things going where in ten or fifteen years, you'd have something done."

The initial scoping benefited from several efforts at mapping high value lands, leading to the creation of the set of maps included in the Strategy Book. As one participant involved in the process explained, "We spent a fair amount of time identifying landscapes. We created a whole series of maps that looked at road density, human disturbance, wildlife abundance, ownership, sensitive and endangered species, and the like. … If areas came up with high roadless characteristics, no human disturbance, high species diversity, boy, that was an area we should look at." Mapping was done on Mylar overlays and included a range of information, such as The Wilderness Society's Index of Wildness, The Nature Conservancy's Portfolio Sites, and the Friends of the River's Inventory of Potential Wild and Scenic Rivers. It also included regionally-specific sources of information compiled from existing plans, such as habitat conservation plans, and the priorities of land trusts.

Priority-setting also benefited from working sessions conducted in collaboration with potential grantees and other stakeholders. Funded by a planning grant, these sessions included a statewide meeting in September 2002 attended by representatives of nine organizations, and regional meetings held in December 2002 which focused on the Desert and North Coast regions. While they provided some useful information about priorities and regional conservation needs, the meetings also served as outreach to potential grantees and advertised the purposes of the upcoming program. One grantee described a visit by PWC staff early on to do their "due diligence" about needs and groups in their region. "It is so incredibly rare to have a funder make the time to bring their staff and their key team up to actually visit and stay overnight and hear from the people that advise us."

## Priorities as Strategic Choices

The initial program planning process produced a map of PWC Priority Areas and Special Opportunity Areas (Figure 4.1) and the extensive Strategy book described in Section 2. Final priorities and grantmaking choices were strategic choices, that is, a mix of science and political opportunities and needs. As one respondent noted, "At the end of the day, it was part science, part art, part our knowledge and connections. … Looking at each of the landscapes and identifying opportunities to advance wildlands conservation. And it depended on a whole variety of factors, ranging from the political climate to the level of ability of groups working in regions." In places like the North Coast where wilderness designation legislation was possible, acquisition priorities were elevated. Ultimately, the map was "a mix of science and politics," according to one respondent.

To us, this seems perfectly appropriate given the 5-year action orientation of the program. Science and stakeholder input provided overall direction; a sense of opportunities and potential leverage provided a filter used to decide final programmatic and grantmaking priorities. Two respondents felt that this process gave RLFF too many opportunities to adjust priorities in a way that fit their own organizational agenda. However, as we document in the rest of the report, it appears that the considerable achievements of the program were squarely within the original intent of the program, and that the volume of accomplishments was partly a result of this science-informed, strategically opportunistic style.

One of the choices that drove some of the priorities was a decision about the meaning and value of wildlands, and the degree to which the program sought to protect biodiversity versus wilderness. One individual involved in the early process noted, "We had long discussions about what is wilderness and what does it actually mean? On a scale of working landscapes to pure untouched, unmanaged wilderness, how far on the scale would we move? Past RLG programs focused more on working landscapes. ... How far were we willing to go in landscapes with some cattle on them and some trees cut? We wanted landscapes that were as close to wilderness as possible. But I can't give you an exact definition, though we had some humorous ones at the time. My favorite is some place where there is another animal that can eat you. Others thought that wilderness is some place that is ten miles or more from the nearest Starbucks. (It should be redefined to 5 miles or more now.)"

There are no easy answers to this question of focus, just a set of strategic choices. But the question of "how wild is wild" set up what program staff viewed as a tension between accomplishing short- and long-term outcomes. As one respondent commented, "We saw tensions between a focus on wilderness and a focus on biodiversity, [and] between a focus on short term wins and long term needs that played out in grantmaking." While some investments may have protected wildlands over the long term – such as grants aimed at managing growth in areas adjacent to wildlands – funded activities would be one step removed from the kind of wildlands protection envisioned in the program. We will return to this tension in several places within the assessment.

PWC Conservation Focal Areas


*Figure 4.1: PWC Priority and Special Opportunity Areas*

## Multiple Interconnected Strategies = A Recipe for Success

> *4.2 PWC is relatively unusual within the world of conservation philanthropy in its landscape-scale perspective and deliberate use of multiple interconnected strategies. Both help to explain the successes of the program.*

While a strategic orientation to philanthropy can be found in the grantmaking programs of other funders, a focus on activities at a landscape-scale using a robust and complementary mix of change strategies is a hallmark of the PWC program. The program appears to have been quite effective at finding short term wins, but they did so within the longer term, larger geography of California conservation.

### Larger Scale and Longer Term

Planning and implementing a $159 million program for five-years enabled RLFF staff to think at larger scales than is typical. Funder interest in establishing a comprehensive program with impact at a state-scale translated into RLFF's work on defining a set of outcomes that were appropriate to advance conservation in each region of the State. As we report below, considerable accomplishments were made in most of the regions.

The program was also implemented as a set of investments sequenced over the five year period. Most grants were given for a two-year project period, and many were renegotiated to allow work over a longer time frame. Acquisition grants in particular were challenging to complete within short time frames, and room was provided to grantees to utilize resources as acquisition opportunities appeared. On the other hand, as discussed in Section 5, some acquisitions paved the way for additional acquisitions by grantees or agencies. These grants recognized the value of strategic investments in catalyzing more major changes over time.

Many grantees received multiple sequential grants. Indeed, 93 out of the 165 organizations funded by PWC received more than one grant sequenced through time. For grantees, the longer term perspective provided by the program helped relieve pressures they often feel to achieve immediate success. As one grantee noted, "The multiple year grants are a huge help to somebody that's really trying to get things done. Most of these kinds of projects don't lend themselves to one year of funding; they require a substantial amount of work on the front end. I know that's stressful for a funder, because they need to know that progress is being made." Capacity-building grants in particular were seen as steps toward increased effectiveness that would pay off over many years.

Clearly the long engagement of key RLFF staff members in wildlands conservation issues provided a perspective of the importance of thinking at larger scales for the long term. As one grantee noted, "They are sophisticated enough to understand that these things take not one year, two years, three – but they take ten years. And you've just got to hang in there and provide continuity as a stakeholder. … Other foundations, they might give you funding for one year, or if you're lucky, you might get two years of funding. That doesn't fit the timeline that local government operates under. With local governments, it takes a long time to do things. Public processes are enormously time consuming. RLFF understood that, and allowed us to be at the table for extended periods of time."

## Multiple Complementary Activities

Equally important to the success of PWC was the deliberate use of complementary strategies to secure action and change behavior. In most of its grantmaking, PWC married activities aimed at action (acquisitions; policy; restoration) with activities aimed at building the organizational and political infrastructure to carry out and sustain those actions (capacity-building; constituency-building; planning). As one staff respondent indicated, “Our goal was to combine grantmaking strategies in particular geographies, to go deep in these regions, and build up the groups that were working there. To create additive effects from doing acquisition and stewardship and policy and capacity-building all in the same geographic region.” Almost all interviewees highlighted this mix of action and capacity-building as one of the defining characteristics of the program.

From a long-term conservation perspective, this level of integration among strategy types is extremely valuable. It recognizes the interconnections and synergies between strategies. For example, numerous land trust grantees noted the value of their PWC-funded acquisitions in building organizational capacity by giving them experience with land deals and helping them develop respect and credibility within their communities. In one case, an acquisition project enabled a group to “become a name and a player in the community.” Indeed, if they had not succeeded in the acquisition of a community-valued property, they would have been “perceived as not a very effective organization,” according to a grantee. “Now we are asked to the table to help with open space planning. We are looked to as a leader in the community. We would not be where we are at today, if we had lost” that acquisition.

To PWC’s credit, these interconnections were not serendipitous but rather deliberate and ongoing. Indeed, Table 4.1 indicates the parallel use of multiple strategies in almost all planning regions. Both staff and grantee respondents indicated that some acquisition projects were advanced in large measure to build the capacity of particular local land trusts. For example, a grant given to the Lassen Land & Trails Trust headquartered in Susanville may fall in this category. While a portion of the grant was aimed at purchase of a 116-acre area of deer winter range and wildlife habitat, the RLFF grant summary indicated, “This grant will enable LLTT to raise its profile in the community, conserve valuable wildlife habitat, and build stronger local support for conservation. … LLTT is one of the few local conservation organizations in the Modoc region and has the potential to play an important role in advancing regional conservation. This project supports PWC’s objective of building a stronger conservation constituency in the Modoc region.” The acquisition was completed in February 2005.

Finally, RLFF’s ability to use different contracting mechanisms also facilitated success. It was advantageous for RLFF program officers and grantees to use contracts with for-profit providers of services, such as Centaur North, Inc. for strategic communications assistance, as a way to enhance and extend the capacity of program staff and grantees. The program could also invest some funds in lobbying activities, such as the work of Scott Dacey of PACE/Capstone and Brian Nestande & Associates, which were critical components of PWC’s wilderness policy work. Constraints on most philanthropic grantmaking limit use of these tools which were important to the on-the-ground success of the PWC program.

***Table 4.1: Number of grants made by region and type of strategy***

| Region | Acquisition | Capacity Building | Planning | Policy | Restoration & Stewardship | Total |
|---|---|---|---|---|---|---|
| North Coast | 17 | 10 | 11 | 6 | 4 | 48 |
| Modoc | 3 | 6 | 4 | 3 | 1 | 17 |
| Central Coast | 16 | 35 | 19 | 29 | 4 | 103 |
| Sierra Nevada | 2 | 1 | 5 | 12 | 0 | 20 |
| Central Valley | 1 | 1 | 4 | 5 | 0 | 11 |
| South Coast | 10 | 9 | 13 | 21 | 0 | 53 |
| Desert | 26 | 11 | 4 | 10 | 2 | 53 |
| Statewide | 3 | 31 | 24 | 89 | 1 | 148 |

## Measuring Success and Adapting to Change

*4.3 RLFF implementation of the PWC program was solidly grounded in a set of performance metrics. The program evidenced significant adaptive learning and change.*

While the current mantra of foundations is “tangible outcomes,” it has been our experience that few are particularly good at defining effective measures of success at the outset and even less good at tracking progress over time. In PWC’s case, RLFF staff members were very effective at defining measurable objectives at the start, reasonably effective at adapting to changes along the line, and somewhat less effective at ensuring that grantees used their measures as a mode of evaluation and learning at the end of a grant. Nevertheless, there was a palpable culture of adaptive learning that appears to have characterized the PWC staff and leadership throughout the program. This organizational culture served the PWC program well in iteratively assessing progress at the program and grantee levels.

### Quantitative versus Qualitative Targets

As described in Section 2, the 2004 Strategy Book contained as clear a set of quantified performance metrics as is usually produced for a grantmaking program, including acreage targets, numbers of organizations with which to work, number of new partnerships in which to engage, and amount of new funding to generate. These were broken down with statewide and regional targets. While we use these performance metrics to assess progress later in the report, it was clear that RLFF intended the metrics to be a trigger for thought and not the definitive set of intended or likely outcomes. As noted in the Strategy Book, “Listed below is an attempt at quantitative benchmarks that can be used to evaluate PWC’s success in reaching each of its stated program goals. They are intended to stimulate thinking, strategic directions, and specific projects and not as the definitive measures for evaluating the progress. These measures are being designed at the program's onset. Though desirable, it is not possible to predict with certainty the tangible program outcomes over a five-year period. Thus, it is anticipated that these measures will be reviewed annually and revised accordingly in order to set ambitious, reasonable benchmarks to evaluate the program's progress."

Most of the RLFF staff interviewed for the assessment indicated that the guidance in the Strategy Book was taken seriously throughout implementation of the program, but also that they valued adaptation and flexibility to better achieve the program's qualitative goals. According to one, "The Strategy Book played a role in that we all knew what was in it, and we implemented it. It wasn't like we pulled out the book every day. We all had a good idea of where we needed to go, and went from there. It was an important document… but it needs to have plenty of flexibility."

Assessments made by outside consultant Kevin Sweeney at the three-year mark also suggested that numeric targets were less important, because performance even in the seemingly-clear world of land acquisitions was hard to quantify. For example, how should one count purchase of a small inholding that facilitated designation of a larger wilderness area – in acreage of purchased lands or leveraged protected lands? The midterm assessment also noted that the overarching metric of 1 million protected acres was possibly "overly optimistic," particularly given the changes in context that had been assumed by the initial strategy. For example, some sources of funding used in calculating the million acre target had dried up, most notably funding from the federal Land and Water Conservation Fund.

At bottom, Sweeney concluded that holding aggressively to the acreage targets would be distracting and perhaps counterproductive to achievement of the program's qualitative goals. "From the outside, it appears there is little pressure being applied to hit a specific acreage target. This is not to suggest the one million acre goal is not taken seriously–but it shows the program may be placing that figure in its proper perspective. A more aggressive focus on the acreage target might distract from opportunities in capacity building, planning, or the quality of the acreage being acquired." He noted that one criticism of the earlier CCLI program was "its aggressive focus on hitting a specific acreage target. This directed most of the program's energy, until the very last dollars were spent, toward completing land transactions. The investments were almost exclusively in land, not people. Had a larger portion of the dollars–particularly in the last two years of the program– focused more on capacity building, the momentum in some of these regions might not have slowed."

From our perspective, performance targets are important to promote accountability and adaptive learning, and RLFF staff used the Strategy Book targets appropriately to prompt their own thinking about the effectiveness of planned direction. Interviewees suggested that RLFF staff and leadership were self-critical and evaluative throughout much of the program. This ongoing evaluation included "endless hours of debating direction" within the staff, as well as the effort to assess the program at midterm. While Sweeney's report was not as helpful, the summaries of grant activity prepared by RLFF staff provide a very good sense of what had been accomplished in the first three years of the program.

## Adaptive Grantmaking

Changes were made in the program over time, and these changes provide an indication that adaptive learning was ongoing. Some adjustments responded to changes in the external context of the program. The environment for wildlands policy changed dramatically, as the Bush Administration and Republican-controlled Congress promoted an anti-conservation agenda. As a result, PWC spent much more time "avoiding bad things" than they had anticipated in the Strategy Book. Investing in the Sierra Nevada Forest Protection Campaign to protect the Sierra Nevada Framework is one example of "holding the line," as are numerous other activities detailed in Section 7. Shifting wilderness designation campaigns from emphasizing a statewide bill to a district-by-district perspective, with significant strategic outreach to Republican members of Congress, was a similar context-driven shift. Staff also began to understand the importance of land acquisitions to wildlands protection in the South Coast region, which was not anticipated in the initial program strategy.

- **Climate Change.** The emergence of new external drivers such as climate change caused some small shifts in grantmaking later in the program. Indeed, RLFF staff identified climate change as one of eight focal areas of grant activity for our assessment. However, an analysis of grants and grant documents indicates that climate change was not a significant theme in PWC grantmaking. From an analysis of all grants awarded between the start of the program and the end of March 2008, 51 out of 419 grants had the term "climate change" located somewhere within their grant documents, and most of these occurrences were fairly inconsequential to the content of the grants. RLFF sent our team a list of 79 grants that they identified within a Climate Change Focal Area. In fact only 20 of these grants actually mentioned the term climate change; only 6 of them (all either 2007 or 2008 grants) could be seen as having the linkage between climate change and wildlands protection to be the centerpiece of the funded work. These included some significant pieces of scientific research that are described in Section 9. A number of other grants do have implications for the ability of communities to adapt to climate change, though this does not appear to have been a key motivator for the initial.

- **Constituency-Building.** The constituency-building work in the Central Valley and South Coast showed significant re-thinking, with memos developed in 2006 that identified specific strategies drawing on county-by-county demographics and an analysis of Congressional and Assembly district politics. With Latino outreach a priority, the memos identified the need for significant capacity-building among many small organizations, as well as a shift to issues that were more squarely within the interests of the target population. As the Central Valley memo detailed, "outreach Grants must initially focus on issues of greater concern to the Latino community (e.g., air quality, pesticides, drinking water quality, and recreational opportunities for kids and families) and gradually create connections to wildlands and other conservation issues." The South Coast memo hit similar themes and noted, "Urban river corridors provide potential organizing vehicles to connect Latino urban populations with wildland protection, wilderness expansion and wild and scenic river designation opportunities." Indeed, Los Angeles was targeted because it was a power center for Latinos in California, and represented opportunities to benefit underserved communities while building linkages between urban rivers and upstream wildlands.

While these proposed shifts are an indication of ongoing evaluation and adaptive learning, the changes themselves tended to conflict with the program's focus on wildlands conservation with progress measured in terms of relatively short term gains. More work on urban wildlands, greater work on issues like air pollution that would build relationships with Latino groups, and broader activities on working landscapes all may have been indicated by the RLFF strategizing, but were limited by the original conception of the program. Some of the urban projects that might have secured more interest from emerging constituencies "were seen as too far flung from wildlands protection," according to a staff respondent. "We couldn't show that they'd produce short-term wins for wildlands, so we backed off."

## Day-to-Day Grantmaking: Strategic and Pragmatic

*4.4 The "strategic opportunism" orientation at the program level carried over to day-to-day grantmaking, which was pragmatic and flexible yet often hidden from public view. At times PWC achieved outcomes by taking a middle road not often walked by environmentalists.*

RLFF staff were equally strategic when working on individual grants with specific grantees. Part of this comes from being outcome-oriented and deliberate about selecting grantees who would share PWC's goals. As one grantee responded, "I can say with confidence that PWC and RLFF has a vision about where its work ought to go and has been very effective at defining where they want to go and finding partners who can undertake the work. RLFF has been pretty righteous about sticking to its goals." According to another grantee, "Their program is very eco-centric. That's been one of the advantages for us dealing with PWC. Their purpose is to protect land; that's what they are about."

### Pragmatic

If there is one thing that characterizes the approach brought by RLFF to wildlands protection in the PWC program, it is a sense of strategic pragmatism about seeing what could be done and finding ways to get it done. As one staff respondent noted, "In the battle between ideology and purism and political pragmatism, it's our role to be pragmatic." Supporting community-based approaches to forest protection that included cutting some trees, funding grantees to support a sales tax in San Diego County that funded habitat restoration work and transportation construction projects, working in support of others' ballot initiative efforts that included some minor limitations on the power of local government to exert eminent domain – were all attempts to get some action by occupying the pragmatic middle of the road. Contracting with Republican lobbyists to advance wilderness policy in Republican-held districts is another example. RLFF was effective at focusing on conservation ends and finding strategic ways to reach those ends, even if it meant engaging with elected officials like Congressman Richard Pombo. Pombo was viewed by many environmental groups as "the Devil," yet since he chaired the House Resources Committee, he was an extremely powerful member who could block wilderness bills.

Supporting grantees and facilitating negotiations that contributed to protection of the Tejon Ranch is another example of identifying the "reasonable middle" and finding ways to move people toward it. As one grantee described, "You need to have this balance between being an advocate and being collaborative. And they've understood that negotiations and smart compromises are often the way you have to go in southern California. They understood that that would be what would happen on TJ Ranch, and we got 90 percent of the property. … We were able to achieve that because we – along with other PWC grantees – were willing to be collaborative and not always be confrontational. We think of ourselves as collaborative, principled advocates. That also seems to fit with just how PWC saw the world."

Being strategic also meant being willing to take advantage of opportunities that presented themselves. One respondent commented on the need to implement the Strategy Book in a flexible and opportunistic way. "One of the problems with some strategies was that they were not implementable. Projects were either created by staff or grants given out based on grant proposals that came in. It was all about opportunities. If we saw an opportunity, we would do it. And most of the grants were in line with strategies, but some of the strategies, like fire, the opportunities never came up. We could think of what we wanted to do, but nobody that we knew had any ideas and no grant proposals came in. That's why flexibility is so important; it's all about opportunities."

## Operating Under the Radar

RLFF also implemented the PWC program in a manner that can best be described as flying under the radar. That is, working fairly quietly and behind the scenes to enable and encourage action. Indeed, it was surprising to us to interview grantees involved in a common campaign and realize that few understood who else was funded by PWC. And when we asked most grantees and consultants about their awareness of the range of PWC-funded activities, almost no one outside the RLFF staff had even the remotest sense of the overall scope of activities. While there may have been costs to this approach (described below), working under the radar can be quite effective as it limits mobilized opposition to your activities, and enables program staff to function in a way that conserves energy they might have to invest in explaining and defending the program. As one grantee indicated, "That's the best way to do it. When you get out there and try to do conservation, you don't want a lot of flurry about it."

Being strategic also meant that RLFF was willing to shift its funding patterns and cut off grantees who were not achieving program goals. For example, the shift from funding the centralized California Wild Heritage Campaign (discussed in Section 7) to a more decentralized model reflected a decision by RLFF staff about the competence, ability and efficiencies of the CWHC staff and campaign structure. Similarly shifting funding from the National Parks Foundation to the Mojave Desert Land Trust reflected the staff's sense that MDLT was a better bet for completing the purchase (and would build capacity as well.) As one grantee from a different region told us, "I know that RLFF has been good about cutting funds to grantees that didn't know what they were doing. It's very difficult to do that when everybody knows you have a chest full of money in the back room. You have to stop giving funds to people who aren't meeting the programmatic objectives. … I just know that it happened in one or two instances where funding was diminished and pulled, as it should be, and I think that speaks very well to RLFF. Where it's been pulled, I don't think it's necessarily that these people were doing a bad job but they were doing things that weren't RLFF objectives."

## Hands-On, Interactive Style

*4.5 RLFF's hands-on yet flexible style of interaction with grantees was extremely effective and produced a range of benefits.*

When asked about the RLFF style of engagement with grantees, almost overwhelmingly, interviewees described a staff that was unusually interactive and engaged in the grantmaking process. According to one grantee, "They are very, very engaged. I can't think of an example of a foundation that is more engaged."

### Interactive and Flexible

Most felt that the interaction was helpful and produced a better outcome than a more hands-off style. "They have very seasoned project management types. Ed Hastey, for example, was a former state director of the BLM in California. He has a world of really great experience. So if you float something by him, he is really very disciplined about asking, 'well, where is your overall evaluation and assessment of private lands in the Basin? Have I seen that yet? Have you done that?' You're just not going to float that by Ed Hastey. That caliber of people is what they have brought us over the course of the program. It would be a good investment for any foundation that wants to make a difference. We have definitely benefited from that kind of oversight and collaboration."

Another grantee suggested that the interactive grantmaking style was efficient for the grantees themselves. "PWC is good to work with. You don't just file an application in a black hole and wait for a response that comes in a letter. They are more hands-on. You can go and have a conversation with them, and let them know what you're thinking about. You can then continue to work it and bring them a real proposal. This is a much more effective use of our limited time than a competitive grant process."

Grantees also overwhelmingly appreciated the PWC staff's willingness to be flexible. For example, in response to one property that was expected to be purchased in the North Coast but whose sale fell through, PWC was "very flexible in response," said the grantee. They held the funds and allowed us to apply them to related projects in the general area and intent of the grant. This is another aspect of their grantmaking. They recognize that deals do sometimes fall through at the eleventh or fourteenth hour, and are able to continue working with grantees to redeploy those funds." Another grantee described a process where RLFF wanted them to undertake a land acquisition deal that was somewhat outside their mission area. Instead, this grantee made contacts with a more appropriate organization and went back to RLFF and suggested that the other organization be funded to do the work. "PWC was open to these adjustments and two-way discussions," said the grantee.

The style of RLFF program administration was well matched to the conception of the program as one that produces on-the-ground conservation while building long term capacity for further work. In some cases, that involved grantees receiving considerable guidance and encouragement to move in certain directions. Staff members and consultants with the stature of an Ed Hastey could do this with limited push-back. Describing Ed Hastey, one grantee suggested, "He's the kind of guy that will be patting you on the back saying, 'of course you can do this.  Here's what you have to do.'" In many cases, RLFF staff saw themselves as helping to train local activists to be more effective, and they used consultants as a vehicle to make it happen.

While most felt good about their interactions with PWC staff, a small number felt micro-managed.  According to one, "they were a troublesome, meddlesome hands-on funder.  They were on us from day one, bird-dogging and meddling in our engagements." Nevertheless, while this person resented the style of grant oversight, they also felt that the program was "a great gift" to California conservation, and that part of the reason that much got done was that RLFF was actively engaged in the projects across the state.

There were clearly some losers in this process, including those supporting centralized wilderness campaigns, some local wilderness activists in regions that were represented by members of Congress who would not support wilderness, and some members of Boards of local land trusts that were not seen as effectively contributing to the future health of their organizations. Overall, though, the vast majority of interviewees suggested that the PWC style was extremely productive and not overbearing on grantees.  As one noted, "PWC was very good to work with.  I have always had positive interactions with RLFF staff.  I have appreciated their flexibility, and they had a real sense of collaboration with us.  We both wanted to be in a conversation to communicate about our needs and their needs in terms of developing proposals that would work for both of us.  And find places where the goals aligned. …  Every time I had a call on line 1 from RLFF, I was glad to take their call."

## Willing and Able to Act Fast

The ability to take fast action when necessary was another element of the PWC grantmaking style that contributed to the effectiveness of the program. BLM respondents described RLFF as a "godsend," because of their ability to move quickly and their reputation with landowners which enabled land acquisitions to take place.  This respondent described the slow pace of BLM land acquisition activities due to limited funding and ponderous bureaucratic procedures.  "Our work on land exchanges takes forever.  … By the time we get the appraisals, landowners get impatient and frustrated, and the land values have escalated beyond the appraised values."  On the other hand, RLFF "had the ability to move quickly, fairly and in a flexible manner and somehow brought the land into ownership so that we could lock up lands that are critical."

In another case, a local land trust described their challenges associated with closing on a property which they viewed as extremely important in its biological value and the community support it would engender.  They raised significant funding from the community for the acquisition, and had counted on a particular donor for the final segment of funding.  But the donor balked on the sale.  They were able to go to RLFF and secure the final component of funding which allowed them to close the deal within a 60-day window.  They felt that the deal was a particularly important one to establishing them as a credible player in the community, and if it had fallen through, their future work would have been undercut.

## The Costs of a Below-the-Radar-Screen Approach

*4.6 Working "under the radar" had several potential costs, including some minor coordination issues, a limited ability to build a strategic consensus within the California conservation community and some loss of peer-to-peer learning. While elements of some of these were evident in RLFF's implementation of the PWC program, the bigger issue may simply be a lost opportunity to energize the community through the perception of shared success.*

PWC's behind-the-scenes style of operations may have lead to suspicion and confusion on the part of a few individuals in the conservation community. As one respondent noted, the scope of the program "remained a topic of much speculation and uncertainty over the course of five years. Even in the course of working with their program officers, it was not clear how they set priorities. We were not aware of what was funded. There was only word of mouth. We begged them to talk to us. But they were very secretive."

In the mid-term assessment, the issue of secretiveness was raised by consultant Kevin Sweeney. According to his report, "The low visibility of the program has been praised, but not universally. Many groups appreciate that PWC does not compete with them for funding, or seek to gain the kind of visibility that can often send confused messages. Nonetheless, some have been critical of it. In part, they reference tightly-held information. One person said the program can feel secretive. And it leads to some interesting questions. Does this inhibit collaboration or serendipity? Does it prevent the whole from being greater than the sum of its parts?"

From the PWC program staff perspective, they were being "anything but secretive." According to one respondent, "We talked with anyone who contacted us and made field visits around the state regularly to touch base with groups. We also sent letters notifying grantees of the kinds of services available and linked them into regional meetings on policy ... and gathered groups to get debriefings from pollsters and communications consultants working in their regions, as well as supported about 40 organizations' participation in the annual Land Trust Alliance Rally. We shared maps and strategies, talked of goals and objectives, identified eligible types of grants – for example, planning or policy but generally not litigation – but did not publish the Strategy Book or distribute maps of priority areas."

### Consensus-Building

Some respondents felt that RLFF's implementation of PWC did less than it could to build a consensus among conservation organizations in California. According to one, "They had an opportunity to pull the community together with a bigger picture strategy to talk through where the priorities should be. They did not do that. They did not serve as a mechanism for bringing us together so that there was strategic investment in what they were doing. This was a tremendously missed opportunity given the magnitude of resources they were dealing with. A networking opportunity to bring people together…. They did that far less than I would have expected."

Staff respondents acknowledged less engagement in consensus building at the macro level. "When the funder convenes something, it is hard to know how to add value and get groups to speak honestly about what's going on. … It's hard to not appear top-heavy." Their unsatisfying experience with the California Wild Heritage Campaign may have influenced their perspective. "In the wilderness campaign, we were kind of like a skunk at a picnic, saying things that people don't want to hear."

Consensus-building takes time and requires trade-offs made to satisfy various members of a coalition, which is perhaps the antithesis of an action-oriented program seeking to achieve tangible on-the-ground accomplishments in a fairly short period of time. In many cases, winning requires support of a simple majority of interests, not a vast coalition of supporters. To its credit, PWC did fund several regional-scale planning processes that seek to achieve broader support for future conservation actions, and individual grantees like the Smith River Alliance and the California Wilderness Coalition are doing significant work at outreach and coalition-building. As staff respondents explained it, "one of the great accomplishments of the program was that we funded small, local groups and they became better connected to regional and state networks." Whether PWC should have played a greater role as a convener of wildlands interests themselves is an open question. By investing in multiple localized nodes of activity, they may have achieved as much bottom-up support for conservation as a more top-down and visible consensus-building approach.

## On-the-Ground Coordination

There may have been instances where a perceived lack of transparency about funded activities led to uncoordinated action on the ground. One respondent talked about polling conducted by an out-of-district consultant in support of wilderness legislation in the Eastern Sierra (the McKeon bill) which was done without consultation with other wilderness advocacy efforts in the region. "They commissioned a poll to feel out how the conservation community was doing, and see what might work. And there was a huge backlash. McKeon's staff thought we were doing it. It was well-intentioned but was done with no understanding that it might have consequences and we might be a partner group, and that we might want to share information." In this respondent's view, "the very secretive nature of the RLFF work caused this whole disruption in the district. It looked like we didn't know what we're doing, and confused the Congressional office." In response, program staff indicated that "Regional groups were consulted in advance, apprised along the way, but not given control of the project. We repeatedly met and consulted with local activists, as well as statewide and national representatives regarding the Eastern Sierra strategy."

It is hard to assess how much of a problem a lack of transparency might have been, and whether this was largely a matter of perception by a few individuals. It is equally hard to assess whether a more visibly coordinated effort might achieve greater results in the long term. Paying somewhat more attention to apprising partner groups about activities, and investing somewhat more in broader strategic dialogues might have been productive. We remain surprised about how limited a perspective individual grantees had on the overall scope of the PWC program, and wonder whether knowing more about others' activities would provide a greater sense of common purpose and opportunities for network-level learning. Indeed, we believe the conservation community would be proud of the accomplishments of the PWC program and might be empowered and uplifted by this knowledge. We return to this theme in Section 10.

## Program Time Frame – Pros and Cons

*4.7 The five-year time frame of the program had both pros and cons in terms of the effectiveness of the program. A somewhat longer program might have allowed for a more gradual start-up and transition out at the end of the program.*

While five years seems like a fairly long period of time for a grantmaking program, for a $150 million statewide program involving multiple strategies and complex networks of organizations, the five-year time frame had both positive and negative effects. It clearly placed a premium on getting grants out the door relatively early in the program, drawing on the agenda for action framed through the planning grant. The CCLI program and the RLFF staff's familiarity with specific places like the Desert region helped create initial momentum and direction. Some respondents felt that the need to get grants out-the-door limited PWC's ability to leverage additional funding and may have undercut efforts to build broader coalitions and consensus-based visions of needed action, even if RLFF had seen those as important products of the program. On the other hand, some felt that the fast pace tended to drive some strategic choices in a positive way, including cutting off underperforming grantees and coalitions of grantees.

As Figures 4.2 and 4.3 demonstrate, funding levels remained fairly constant throughout the program with roughly $30 million spent in each of the core years of the program (2004-2007). Investments in Desert land acquisitions accounted for more of the initial funding, while capacity-building grants were a significantly greater share of grantmaking in the final years of the program. Respondents indicated that an emphasis on building capacity of a subset of already-funded grantees in the final years of the program represented a deliberate effort to build the organizational capacity needed to sustain the PWC-funded achievements.

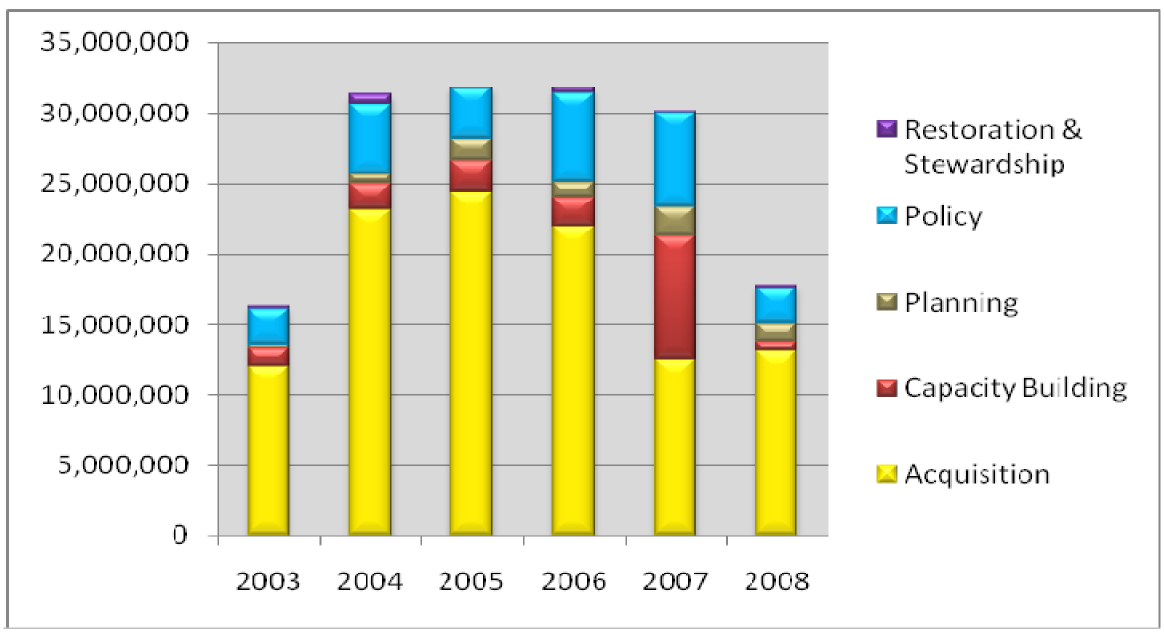



***Figure 4.2: The evolution of PWC grantmaking by strategy type***

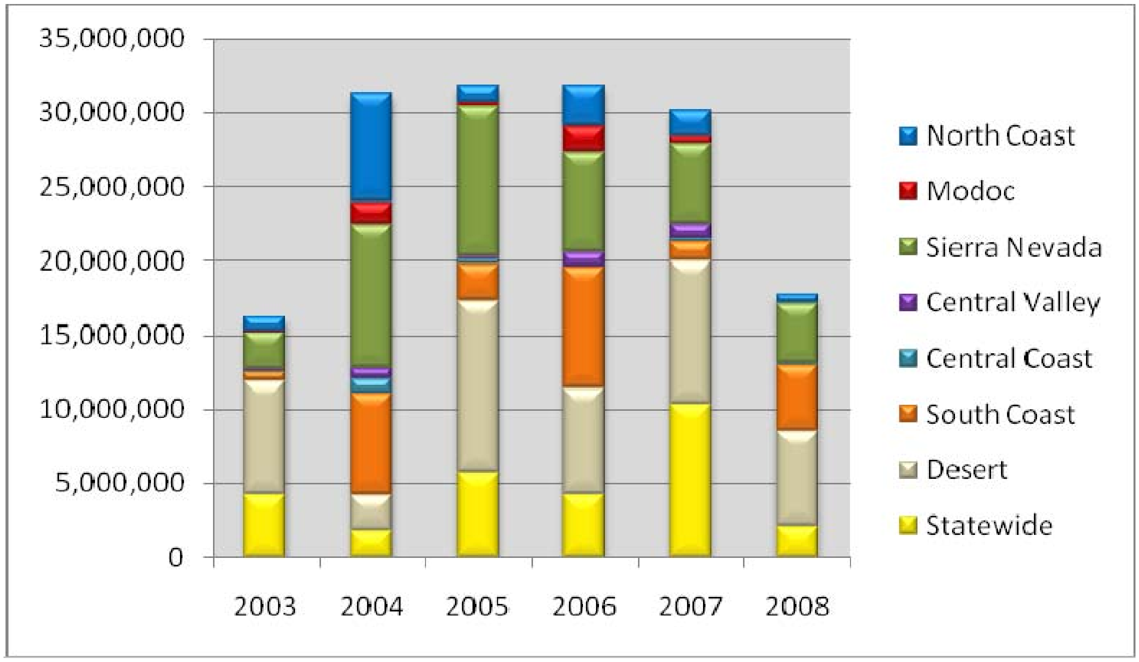



***Figure 4.3: The evolution of PWC grantmaking by region***

When viewing the program as a set of iterative and interconnected investments, a five-year time frame becomes somewhat problematic. As one respondent commented, "From the CCLI experience, a 5-year time frame is a really good time frame to do some of this stuff, but a longer time frame is really needed to lock these things in so that they have lasting value."A seven-year program might have allowed for a more deliberate start-up and phased transition out at the end of the program. Grantees and program staff particularly argued for additional time to wean grantee organizations and facilitate more fundraising and substitution of revenue sources at the end of the process. Besides the individual organizational capacity-building that did occur, expanded efforts to help the conservation community devise future strategies in the absence of the PWC funding – facilitated by a somewhat longer project lifecycle – might have provided more leverage in the transitions made at the end of the program.

## Streamlined Staffing, Competent Consultants

*4.8 PWC program staffing was extremely efficient, utilizing a small number of very competent people in collaboration with a small number of very competent consultants.*

For a $150 million grantmaking program, direction and oversight was provided by an extremely small staff. Depending on how one counts the "staff," roughly 4-6 individuals oversaw all grant activity at any one point in time. That they could provide the level of engagement and strategizing that appears to have characterized PWC is nothing short of amazing. Table 4.2 lists grant responsibilities by lead staff member as allocated of March 31, 2009. While the table does not list former program staff or other staff members who also worked with grantees, it indicates an impressive workload for some staff, such as Ed Hastey and Mark Kleinman. This might not be remarkable if the program was a turnkey operation, with limited engagement of program staff in identifying potential projects and grantees and little interaction with grantees once they were funded. But by all accounts – from staff and almost all grantees we interviewed – this program was anything but hands-off. At bottom, given that the hands-on style seems to have been extremely effective in promoting conservation outcomes, the low level of program staff means that the donor got a pretty good deal in terms of programmatic overhead.

***Table 4.2: PWC grants by staff member identified as lead in the grants database***

| Project Lead | Acquisition | Capacity Building | Planning | Policy | Restoration and Stewardship | Grand Total |
|---|---|---|---|---|---|---|
| Aaron O'Callaghan | | 2 | 4 | 14 | | 20 |
| Corey Brown | | 6 | 15 | 49 | | 70 |
| Ed Hastey | 73 | 20 | 22 | 3 | 8 | 126 |
| Felecia Straub | | 1 | | | | 1 |
| Jim Sarro | 1 | | | | | 1 |
| Julie Turrini | 3 | | | | | 3 |
| Kristen Merrill | 1 | 32 | 12 | 12 | | 57 |
| Mark Kleinman | | 43 | 25 | 77 | 4 | 149 |
| Michael Valentine | | | | 1 | | 1 |
| Peggy McNutt | | | 5 | 14 | | 19 |
| Richard Frank | | | | 1 | | 1 |
| Mary Scoonover | | | 1 | 4 | | 5 |
| Grand Total | 78 | 104 | 84 | 175 | 12 | 453 |

*Note: This table represents staff responsibilities listed in the database as of 3/31/09 and does not necessarily reflect staff assignments (including former staff members) throughout the life of the grants.*

## A Committed Staff Who Were Themselves Conservationists

The individuals who worked as PWC staff members were extremely committed to the program, and the culture of RLG/RLFF, including the commitment evidenced by program leadership, kept them engaged beyond a normal workload. According to one staff respondent, "It was crazy. I was on the phone all day with the grantees – giving them ideas. Seriously I would come to work; get on the phone, be on the phone all day. Then I'd go home and do my work. Ed was technically part time – no way he worked part time."

Part of the reason that the staff could function as well as they did was because of their prior levels of experience with California conservation. Most program officers came to RLG with significant background in wilderness protection. As one grantee reflected, "Their program officers are people who came from the activist world themselves, who worked for other conservation groups, and now switched over to the grantmaking field. So, it was much more of a team effort." Both Maureen Rose and Paul Spitler were well grounded in wilderness advocacy work prior to joining the PWC staff. Spitler had worked on the Ancient Forest Campaign and been executive director of the California Wilderness Coalition and had led state and federal wildland protection efforts. Rose had worked for Friends of the River, Southern Yuba River Citizens League and Campaign for America's Wilderness leading state and federal wildland and river protection campaigns.

Other RLFF staff and consultants were equally experienced. Ed Hastey had worked for the U.S. Bureau of Land Management for more than forty years, was California State Office Director for twenty years, and by some accounts, knew "every acre of dirt in California." Michael Mantell and Mary Scoonover had years of experience working with state and federal government on a variety of policy campaigns, and their prior work with the CCLI and CCMI programs gave them a substantial base from which to work. Scoonover also was a long-time volunteer and Board member of the California Wilderness Coalition and had been actively involved in federal wilderness and wild and scenic river campaigns.

In our interviews with grantees, PWC leadership and staff were almost universally praised for their knowledge, level of engagement and style of interaction, and a large measure of the program's success rests on their shoulders. While technically he was a consultant, Ed Hastey was for all purposes a PWC staff member who received rave reviews from a range of grantees across the state. "You just have a total winner in Ed Hastey. I think everyone universally admires and respects Ed for the work he does. I really admire Ed because of the work he's doing to move thing ahead in a way that is supportive of the process and supportive of the nonprofits." Even a long time wilderness activist who described Ed's role as BLM State Office Director as Darth Vader – "we used to call the roads the BLM blasted into potential wilderness Hastey Roads" – was overwhelming positive in describing his role in pushing the conservation groups to go beyond the compromises they were willing to make.

Given the important role of the BLM in California conservation, particularly in the desert, employing Ed Hastey as an agent of PWC, was extremely effective. As described by one BLM interviewee, "Ed certainly knows the agency very well. He can push us beyond our normal reach, and we can accept things from Ed that we couldn't from a stranger. 'Come on guys, think outside the box.'" If another staff member had tried to play this role, "it would have taken a lot of time to earn that level of trust and credibility." Several interviewees suggested that the BLM's willingness to accept and push the Department of Justice to accept deed restriction language on lands turned over to the agency was partly a result of Ed's engagement. "He's part of their old boy network," said one respondent. "He knows how the politics works at BLM and was able to work very effectively with us to help figure out how you go about reprogramming funds so that the project could come to fruition," said another.

Michael Mantell and Mary Scoonover were clearly respected by staff and grantees for their vision and engagement, particularly on policy strategies. As one respondent put it, "A lot of reason RLFF funded certain groups was because Michael, Ed, Mary and [others] brainstormed and thought about what could be done. These are three extremely brilliant individuals, who had a vision for something that could happen, and they knew people who could do it. It was a recipe for success."

## Strategic Use of Consultants

One way that RLFF expanded their capacity to engage in as hands-on a manner as possible was through the strategic use of consultants to build the capabilities and direction of grantees. Being able to contract with for-profit consultants enabled this capacity-expanding strategy, and for a number of the consultants, prior interaction with RLFF on the CCLI and other programs built a base of understanding that enabled them to be effective with grantees.

Most of the consultants received rave reviews from grantees. Shelton Douthit's work on facilitating most of the land deals in the desert, and in assisting land trusts throughout the state, was critical to the success of the acquisition program. As one land trust grantee explained, "We weren't dealing directly with landowners at the land trust." Douthit's team identified willing sellers, engaged in negotiations with them, did due diligence and a range of site-level work and closed the deals, which resulted in parcels being turned over to the land trusts. The quality and effectiveness of his work help account for the ability of the PWC program to acquire so many parcels in a four year period of time.

Other consultants also provided services that were critical to the success of the program. Scott Dacey, a lobbyist with PACE/Capstone, was widely credited with the key intermediary work on the major wilderness bills. As one grantee noted, "On the Thompson bill, RLFF hired a Republican lobbyist, Scott Dacey, who did a terrific job, and is still doing a terrific job. He is collaborative, consults with us and RLFF. We agree on a strategy and work together. And he has a zillion contacts. He was particularly helpful with [House Resources Committee Chairman] Pombo. I don't know what we would have done without him."

La Piana Associates and Ruth Norris provided organizational development consulting and coaching work to more than two dozen PWC grantees that was seen in most cases as quite helpful. According to one grantee commenting on a La Piana organizational assessment, "It became incredibly valuable because of how carefully and closely and thoroughly they assess you. It's just a great barometer. Here's where you are right now; you've got some serious work to do to maintain the sustained work that is necessary in the Basin. Are you ready to take those things on? … It was very valuable to us, and our Board and community." Only a couple of grantees found La Piana's work less helpful.

Spitfire Strategies and Resource Media were used as communications and outreach consultants, and some grantees were clearly benefited by their work. One indicated that his entire messaging had changed in response to Resource Media's advice, and the new framing was much more likely to receive a positive response. Other grantees continue to use Resource Media for their ongoing communications work to good effect. In one case, mentioned by several respondents, however, their work was problematic.

Together with GreenInfo Network which produced GIS-based maps for all the grantees, the consultants created products that were beyond the capacity of many of the PWC grantees working alone. The consultants also provided training and coaching that should leave a significant residue of enhanced capacity behind. In some cases, funding was provided to grantees that enabled them to select their own consultants for technical work or organizational development. In others, RLFF contracted with a single provider such as

GreenInfo Network. Some respondents felt that a downside of the use of consultants contracted directed by RLFF was that in-house capacity was not built as much as it could have been. According to one, "People are frustrated at not having more in-house capacity for GIS and communications work, and I worry about where these groups will go now that the resources are gone." An alternative view is that funding a shared provider like GreenInfo Network was much more efficient than creating small nodes of capacity within many organizations.

Another respondent was concerned that the direct contracts between RLFF and the consultants meant that an opportunity was lost for grantees to build the capacity to manage these types of consultant arrangements. "At first we thought we could bring in consultant capacity that the NGOs could manage. Basically give them the money to hire people, but it turns out that you're dealing with organizations that have limited experience in dealing with consultants and it was a difficult thing both culturally and capacity-wise to do it, both in terms of time and skill. The consultants became consultants of RLFF rather than the grantees, and in the end that is not such a good thing. There's been an opportunity cost that has been lost. The NGOs needed the experience of managing the work of consultants; they haven't actually been managing that to any extent."

This respondent also felt that there was a lost opportunity in managing the Republican lobbyists used to promote wilderness bills in Washington, DC. "Quite honestly the wilderness folks have traditionally only worked with the Democrats and haven't had the relationships they needed for the last eight years. What they needed was the capacity to interact with those [Republican] lobbyists on an intimate level. But it was the RLG staff that was directing and having more intimate conversations with the lobbyists. They were doing it to support those groups, but the relationship is different if you are not actually directing them and paying them the money. … It was our role to help them get beyond the cultural problem and help them grow and manage the consultants and learn how to manage the consultants. It was that opportunity that was missed."

In response, RLFF staff noted that they encouraged direct engagement and interaction between consultants and grantees. To avoid confusion and inefficiencies associated with multiple grantees contacting a single consultant, RLFF identified a point of contact among their grantees for each consultant. For example, on work on the North Coast wilderness bill, PWC consultant Scott Dacey was asked to work with the lead Washington, D.C. lobbyist for the PWC-funded Campaign for America's Wilderness and the state-based lead for the California Wilderness Coalition. All participated in regular conference calls focused on strategy and approach.

## Administrative Issues

The small size of program staff, along with turnover in the program officers (three lead individuals in five years) and a style of decision-making that limited delegation of authority may have produced some bottlenecks in getting decisions made and grantees serviced. According to one respondent, "There is a funnel through which all the decisions have to go. Two people at RLG. Two people only have so much capacity and time, and if it was only this program, that might be okay. But they have a lot of other programs going in their shop.

Everything goes through Mary and Michael, which means it's going to be done really well and well thought out, but it also takes months and months and months beyond what you would hope. The priorities get decisions, but the rest of the grants get drawn out. … My view is that they had inadequate program staffing for the amount of money. They needed somebody on the policy and public lands side to be able to spend more time with the grantees, to find new grantees, to work with their consultants. Someone who Michael and Mary trusted to make decisions on the funding and moving forward."

While it appears likely that program leadership exerts a significant level of control from the top, and we heard former staff describe their view that, "PWC does a bad job of getting back to people on a timely basis" due to the long chain of command, we heard no complaints from grantees about grant administration. Grantees felt that PWC staff were responsive, particularly when compared to other funders.

The only administrative challenge of which we found significant evidence was that end-of-the-grant activities were perhaps done less carefully than most other steps in the process. Final reports were often not filed in a timely fashion, exact acreages of acquired properties were vague, and outcome and lessons matrices were used unevenly. Several grantees said that the problem lay with them; PWC staff had reminded them of the need to file final reports. While challenging to those seeking to evaluate the outcomes of the program, this inattention to grant closure is not unusual and indeed is partly a product of a grantmaking style that worked hard at getting grants out the door to make things happen on the ground.

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Overall, then, there is no question that the style of grantmaking associated with RLFF's implementation of the PWC program was extremely effective in achieving conservation outcomes. While grantees and statewide observers often could not disaggregate RLG, consultants, RLFF, related entity RLF and PWC, and few had any understanding of the broad scope of the program, almost all viewed the effort as having produced major and long-lasting accomplishments for California conservation.

# - 5 -

# PROTECTING WILDLANDS THROUGH STRATEGIC LAND ACQUISITION

***To what extent did PWC acquire significant elements of California's wildlands and ensure their permanent protection?***

While more acreage was "protected" through strategies other than acquisition (for example, through wilderness designation and public lands planning), land acquisition was an important component of the PWC program, and approximately two-thirds of the program's funds were spent on land purchases or the purchase of development rights through easements. More than 220 square miles of California lands were acquired by the program, an area somewhat larger than Lake Tahoe, and roughly five times the land area of San Francisco. This amount of land is not insignificant, even in a state of California's size, and substantial acreage was purchased in the Desert, North Coast and Sierra Nevada regions. However, the impact of these purchases was greater than the amount of acreage involved. By using acquisition money strategically, PWC helped protect assemblages of land parcels that collectively provide protection to important blocks of contiguous land or key wildlife corridors. Using acquisitions in this way expands the impact of the funds by producing landscapes of higher ecological value.

*"PWC will continue to be seen in history as a huge legacy that was great for its time."*

*"The work done on acquiring inholdings in potential wilderness areas was really important. … If that facilitates protection of the area, that is a really big gain."*

*"The no interest refundable grant from RLFF was the knight on a white horse that saved the Black Forest in its springtime of discontent."*

*"You get one opportunity each generation to buy a property."*

By pursuing acquisitions that were strategically-located across the state, PWC's grants affected more than 80 existing protected areas, by expanding or completing them or connecting them to other protected areas. They also protected habitat for more than 83 listed rare, threatened or endangered plant or animal species, especially salmon in the North Coast region.

RLFF also used acquisition grants to foster progress in other strategy areas. For example, purchasing small inholdings in wilderness study areas made them more likely to be designated as wilderness through federal policy. Indeed, one of the hallmarks of the program was the purchase of small parcels whose protection had a larger impact than the size of the parcel would suggest. In the best of cases, the PWC investments catalyzed broader protection processes, as has been the case in key "linkage" areas in the southern Sierra and eastern South Coast regions. Some land acquisitions also helped build the capacity of young land trusts to do land deals, building their expertise for future protection efforts.

The program had to deal with challenges. While RLFF came reasonably close to hitting its acquisition targets in many of the regions, it did not succeed in the Central Coast. It is always challenging to run a program that targets particular landscapes but relies on purchases from willing sellers, who are often only “willing” once a generation. RLFF was successful at employing extremely knowledgable consultants to carry out extensive outreach to landowners. Land values were escalating throughout the project period making it difficult to have updated appraisals that would motivate sellers. Getting donation restrictions codified in lands transferred to federal agencies is always problematic, but RLFF’s consultants were unusually effective at securing unique protection agreements.

This portion of the overall PWC program has to be viewed as a significant contribution to wildlands conservation. In the words of one statewide observer, “PWC will continue to be seen in history as a huge legacy that was great for its time. [RLFF] was so strategic and insightful in terms of heading off problems rather than waiting for them to exist. … I think every one of those acquisitions is important, including removing inholdings from potential energy development in wilderness or national parks. When we look back at it in history, we will be able to say that it was great to be able to do what we did when we did it.”

## Significant Acreage Acquired in Priority Areas

*5.1 PWC acquisition grants resulted in between 142,000 and 202,000 acres protected throughout California, depending on what one counts. Most of this acreage was located in the regions and areas identified as priorities for acquisition in the Strategy Book.*

PWC awarded 78 acquisition grants at a cost of $94 million. These grants resulted in an estimated 142,428 acres acquired across the state, involving over 570 individual parcels. These acquisition totals include lands acquired in fee simple as well as lands “acquired” through purchase of development rights via easements. An additional 30,000 acres of grazing allotments were retired due to PWC activities, though these require changes in BLM plans to be considered permanent protection. RLFF staff estimate that an additional 30,000 acres were protected where PWC-funded acquisition of adjacent property was a major impetus for acquisition, but we could not find documentation that protection of these lands was a result of PWC grantmaking.

As noted in the Methods section of the report, we tried to take a conservative approach to estimating land area acquired by limiting our assessment to lands acquired directly with PWC funds, and we have used the 142,428 acre figure as the basis for the following analysis. Hence, this should be seen as a conservative estimate of acquired acreage, and indeed, as we note below, PWC grants clearly leveraged other funders’ investments that resulted in a larger amount of protected landscape. The acquisition total should also be seen as a conservative estimate because some grantees have not reported final numbers to RLFF, and because acquisitions are still occurring under some grants. While a firm number is not possible, we believe that the patterns that we report below would not change significantly with more refined data. Since we judge most aspects of the program as successful, a conservative estimate of acquisitions means that the final numbers will – in all likelihood --only reinforce these judgments.

## Most Acreage in the Desert, North Coast and Sierra Regions

The largest number of grants and proportion of acquired acres was in the Desert region, followed by the North Coast and Sierra Nevada (Figure 5.1). The most land, about 59,754 acres, was acquired in the Desert region, where the highest number of grants (24) and the most money were also awarded (about $34 million). A significant amount of acquisitions was also made in the North Coast (about 38,111 acres) and Sierra Nevada (26,736 acres). Acquisitions in the Modoc and the South Coast were more moderate at approximately 8,947 and 7,820 acres, respectively. The least acreage was acquired in the Central Valley (629 acres) and Central Coast (431 acres), or less than 1% of the total acreage.

Regional differences in acquisitions match PWC's different goals for each region, except in the Central Coast where acquisition fell most short of expectations (Figure 5.2). In the Modoc and Central Valley, PWC's strategic focus was on constituency-building thus, it is not surprising that relatively little was acquired there. The South Coast was the only region where land acquisition exceeded initial expectations, and program staff indicated that they realized the significance of acquisitions in this area as the program evolved. In particular, land acquisition in the linkage and interface areas between the South Coast and the Desert became important opportunities, particularly in the Upper Santa Margarita watershed. While acquisitions on urban river corridors in the South Coast region would have been helpful to PWC's constituency-building work, we could find no completed acquisitions of that sort.

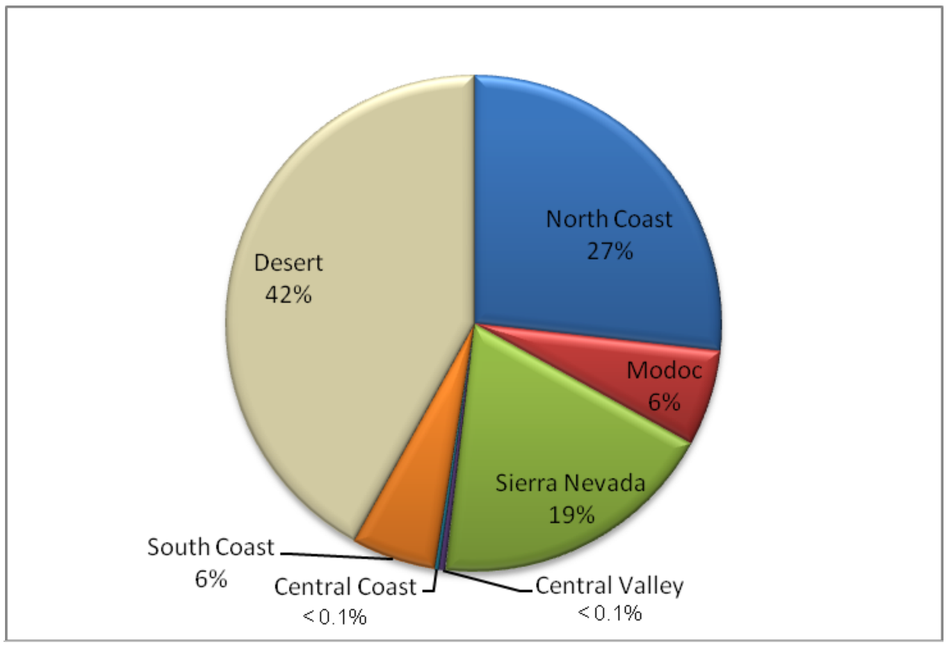



***Figure 5.1: Distribution of acquired acreage across PWC regions***

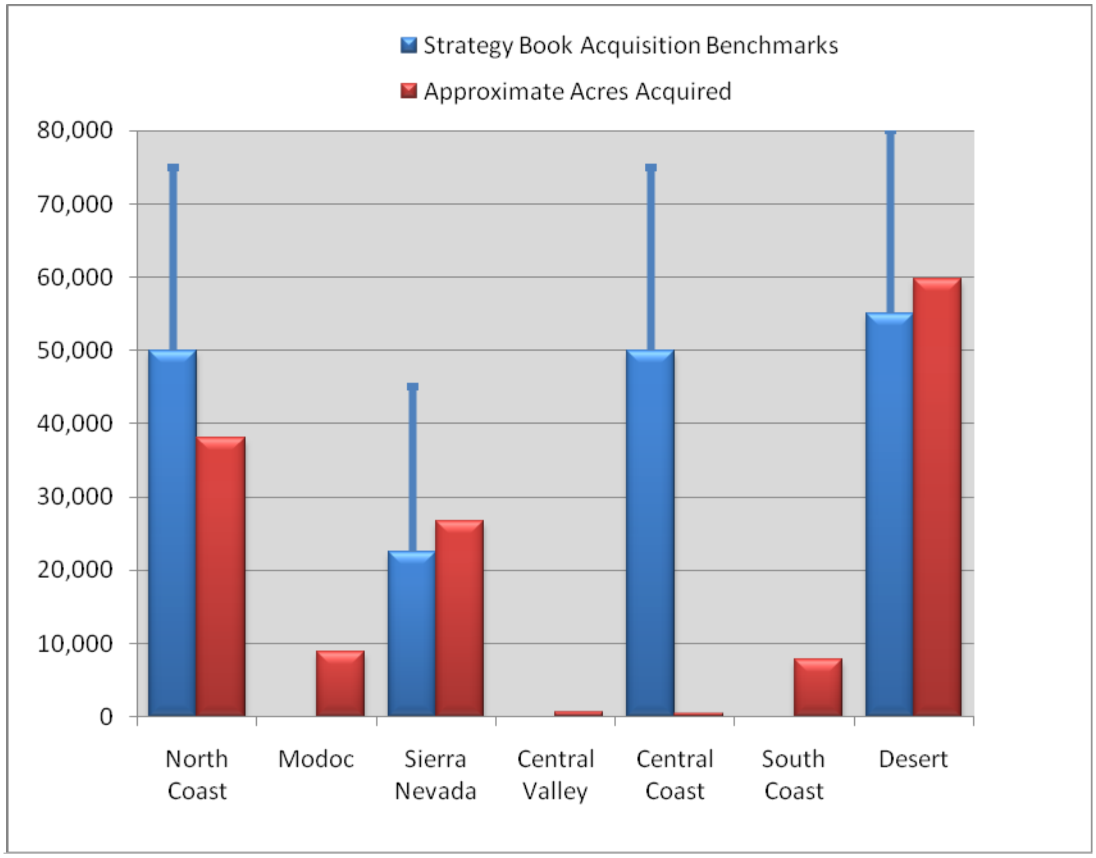



***Figure 5.2: Comparison of acquired acreage to PWC Strategy Book benchmarks***

The Central Coast region was the most disappointing in terms of land acquisition activity, since the Strategy Book targeted 50-75,000 acres to be acquired. Two grants produced a total of 431 acres to date, including 39 small inholdings within the Carrizo Plain National Monument. Other PWC strategies produced land protection in this region, including, for example, policy work on Fort Hunter Liggett. RLFF staff also worked with Congressman Sam Farr and Senator Diane Feinstein to secure Land and Water Conservation Fund monies to pay half the costs of a 1,967-acre $5.3 million acquisition adjacent to Pinnacles National Monument. The Nature Conservancy had purchased the gateway property, which prevented development and bought time for the National Park Service to secure funding that will enable this area of rolling grasslands, oak woodlands and California condor habitat to be incorporated into the Monument. But no PWC acquisition dollars were used on the purchase.

Why was there so little PWC-funded acquisition activity in the Central Coast region? Program staff indicated that the most significant constraint to PWC protecting land in the Central Coast was that these acquisitions were more likely to involve working lands where protection would involve the purchase of easements (not fee simple acquisition), and both working lands and easements were not the focus of the PWC program as it was implemented.

## A Good Fit with PWC Priority and Special Opportunity Areas

Almost all PWC acquisition activity was within identified Priority and Special Opportunity Areas (Figure 5.3). About half of the acreage acquired and acquisition funds awarded were within areas identified as Priority Areas for acquisition in the PWC Strategy Book. About 40% of the acreage and funds spent were within Special Opportunity Areas. At least some of the acreage acquired by ten of the grants (representing about 8% of the total acreage) fell outside of identified focal areas.

The large amount of Special Opportunity acreage in the North Coast represents the Cache Creek watershed acquisitions (especially Napa Ranch, which is discussed more fully below). South Coast acquisitions all fall within Special Opportunity Areas simply because no Priority Areas were identified in this region, yet, as discussed above, program officers increasingly saw a need to acquire land within key landscape linkages.

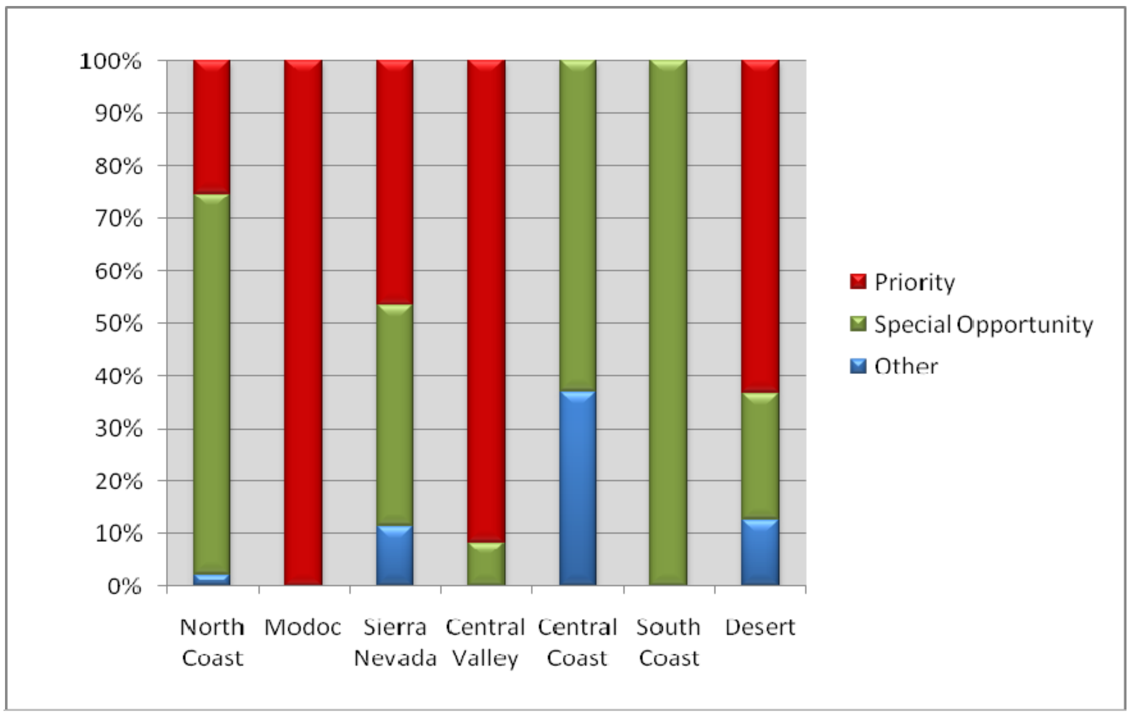
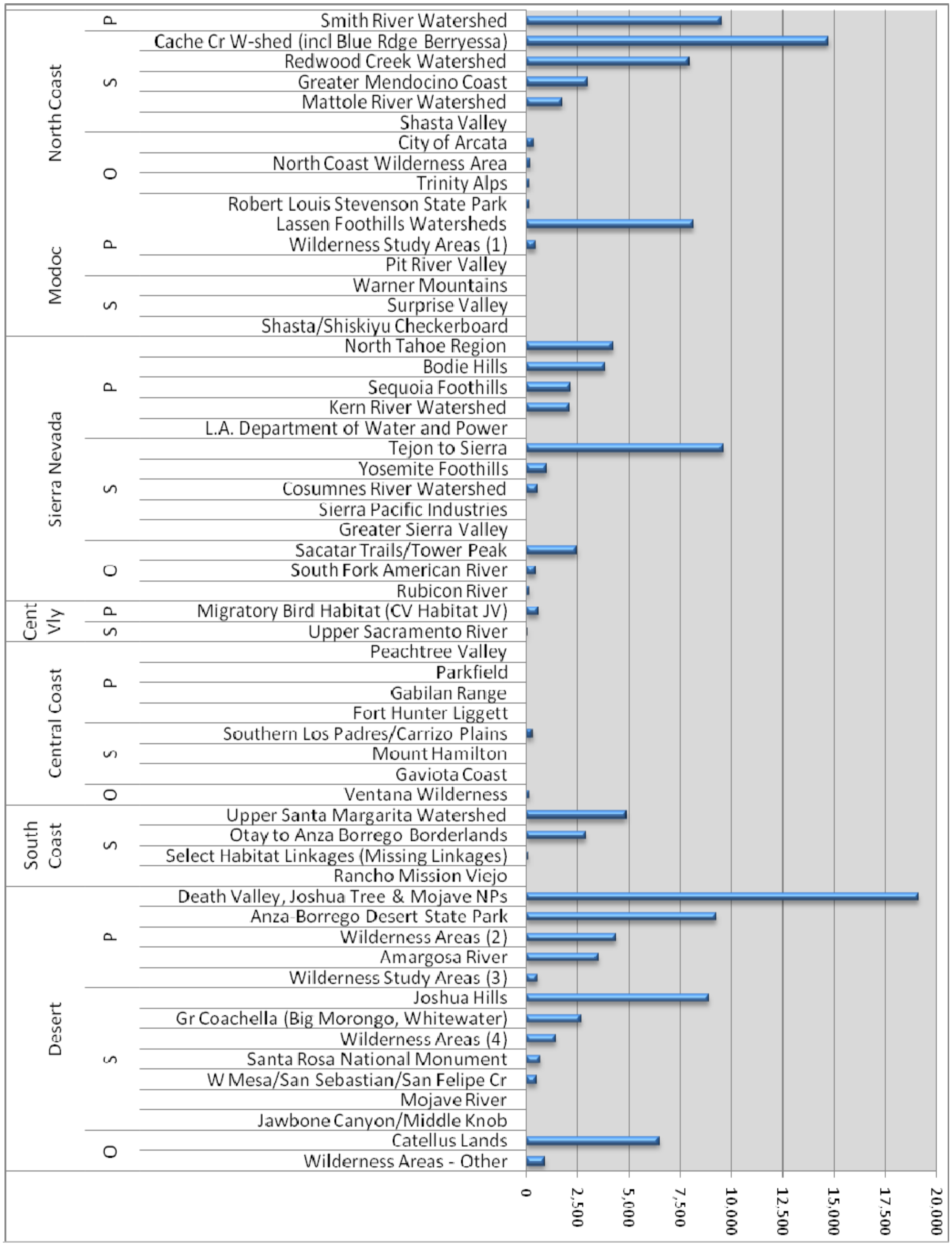



***Figure 5.3: Relationship of acquired acreage to original PWC priorities***

The PWC acquisition results show a laudable amount of work throughout California, rather than only in a particular region or area. With the exception of the Central Coast, acquisitions were completed in most of the Priority areas (Figure 5.4). This is quite impressive considering there were a total of 19 identified Priority areas across the state. Of those 19, all but six (4 in the Central Coast) had some acquisitions completed in them. The Pit River Valley in the Modoc and the Los Angeles Department of Water and Power lands in the eastern Sierra were the two remaining Priority areas in which no land deals were completed. Both are challenging places to work: the Pit River Valley because of the lack of conservation capacity and negative attitudes toward environmentalists, the LADWP lands because of the rising interest in energy development and the political challenges of working with the utility.

*Figure 5.4: Acres acquired in PWC Priority Areas and Special Opportunity Areas*




KEY: P = Priority, S = Special Opportunity, O = Other. (1) Nine WSAs, including Tunnison Mts, Timbered Crater, Skedaddle Mts, (2) Sixteen WAs including Santa Rosa, Mecca Hills, Orocopia Mts, Old Woman Mts, Stepladder Mts, (3) Denning Spring, Avawatz Mts, Soda Mts, Cady Mts WSAs, (4) Twelve WAs including Jacumba, Kelso Dunes, Dead Mountains, Palen/McCoy.

Levels of success were a little lower in the Special Opportunity Areas.  Of 27 Special Opportunity Areas, 16 received at least one completed acquisition. Of the balance, four were areas in the Modoc or the Central Coast which had the same problems as described above. No lands were acquired from Sierra Pacific Industries, a timber company in the Sierra Nevada, where they are the largest private landowner.  However, a 1,000-acre SPI parcel was acquired in the Mattole River watershed, a Special Opportunity Area in the North Coast.

Even though acquisitions did not occur in some of these areas, often PWC grantees were working toward greater levels of protection through planning, public land management and creation of organizational capacity. Even without that caveat, however, PWC's record of accomplishments at closing land deals in most of their priority areas stands as a notable achievement of the program.

As to the acquisitions outside of PWC Priority and Special Opportunity Areas, if they were more prevalent or lacked wildlands conservation value, that might be cause for concern. But this is not the case. Indeed, the purchase of these parcels can be seen as evidence that RLFF followed its "strategic opportunism" approach in dealing with land acquisitions. For example, the Bandettini property was one of four primary inholdings left within the Robert Louis Stevenson State Park in Napa County. This park borders the Blue Ridge-Berryessa Natural Area, which includes the Cache Creek watershed – an area identified in the PWC Strategy Book as a Special Opportunity Area in the North Coast. Although the Bandettini property fell outside of PWC's predetermined focal areas for acquisition, it presented a tremendous conservation opportunity when it became available, and PWC was able to assist in its acquisition. Though only 147 acres, the Bandettini property serves as core wildlife habitat for the state park. It was ranked in the highest priority acquisition category by California State Parks and as Priority 2 conservation land by The Nature Conservancy.

Other acquisitions outside of PWC focal areas also seem to fit the program's goals. In the North Coast, these include inholdings in several Wilderness Study Areas and a wetland near preserves owned by the City of Arcata. In the Central Coast, the relatively large proportion of "other" acreage (Figure 5.3) was a 160-acre acquisition of an inholding within the Ventana Wilderness Area. In the Sierra, three grants that fell outside of identified areas involved Wild and Scenic Rivers, wildlife corridors, and protection of unique riparian habitat from development. In the southern Sierra, PWC grantee Wilderness Land Trust acquired a 2,435-acre property adjacent to the U.S. Bureau of Land Management's Sacatar Trail Wilderness, which is close to the Kern River Watershed priority area. As we discuss below, since the property is located adjacent to Congressionally-designated wilderness, the acquisition can become designated wilderness by administrative action.

In the Desert, the "other" acreage is the 6,462 acres of Catellus "railroad lands" located in the Mojave and Colorado Deserts (Figure 5.5). The lands are not wilderness or wilderness study areas, nor are they within PWC identified Priority or Special Opportunity Areas. However, these acquisitions are significant, as they complete the final phase of one of the largest conservation acquisitions in history, which protected 600,000 acres through private and federal funding. The PWC acquisition took out most of the remaining checkerboard ownership in the region, which improves connectivity, a PWC priority.

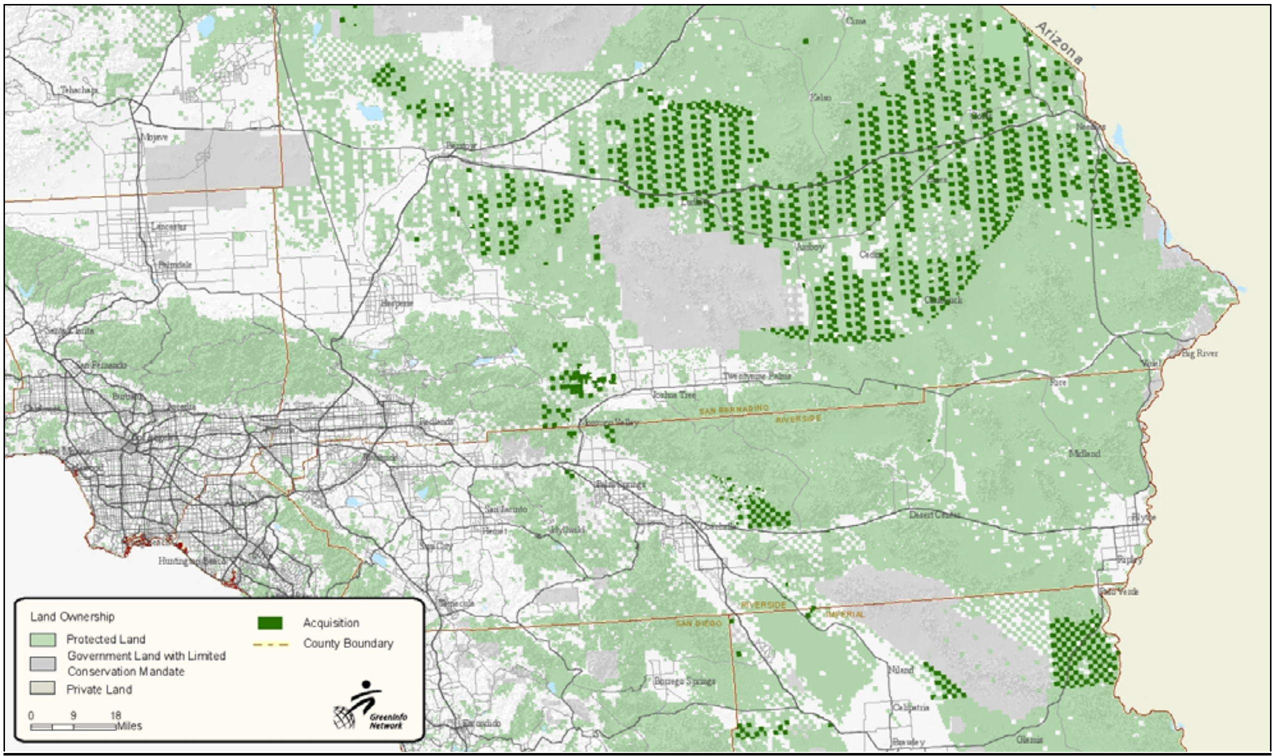



***Figure 5.5: Pattern of Catellus "Railroad" lands***

## Hotspots of Acquisition Activity

Hotspots of acquisition activity include specific watersheds in the North Coast and Sierra Nevada and the Desert national and state parks. Despite the pattern of statewide activities, these areas received more grants and/or funds or simply involved the highest acreage. For example, the most acreage was acquired in the following areas:

- **National and state parks in the Desert** (28,386 acres), including 19,147 acres across Death Valley and Joshua Tree National Parks and the Mojave National Preserve, and 9,239 acres in or adjacent to Anza-Borrego Desert State Park. Including leveraged acquisitions that relied on other funders, total acreage protected within this region may be as high as 43,000 acres.

- **The southern Sierras** (11,659 acres protected in fee simple or through easements), including one large conservation easement protecting the 9,576 acre Parker Ranch in the Tejon to Sierra corridor, and just north of that in the Kern River watershed, involving 2,083 acres acquired, along with 30,000 acres of grazing allotments held by Audubon under a nonuse agreement with the BLM

- **Cache Creek watershed** in the North Coast, covering 14,976 acres of acquired lands with most concentrated in the 12,575-acre Napa Ranch

- **Smith River watershed** in the North Coast, with 9,500 acres protected

- **Mattole River watershed** in the North Coast, including 7,280 acres acquired

Certain areas also involved an especially large amount of funding. Over $8 million each was awarded for the acquisition of lands in two areas:

- **The Upper Santa Margarita Watershed** in the South Coast region**,** including Beauty Mountain

- **Desert national parks**, including lands within and adjacent to Death Valley and Joshua Tree and Mojave National Parks

## *Much Acquired Land Judged Valuable by Others*

*5.2 A reasonable percentage of the acquisitions, including the lands in which PWC invested the most, were considered by other organizations, agencies, and experts as the 'right' places to invest. Many pointed to the PWC priority on acquisition of small parcels as a unique and valuable element of the program.*

Just because land is set aside, does not necessary mean that it is particularly valuable as conservation lands. As a means of protecting important aspects of biological diversity and critical ecosystem processes, every wildland acre is not the same. To assess the conservation value of the PWC acquisitions, we looked at: how other analysts judged the conservation importance of the landscapes in which protection took place; how specific parcels were located in relation to other protected areas; which habitats and species were protected by these parcels; and how protected the acquisitions will be to assure their long term conservation value.

### Matching Other Assessments of Conservation Priorities

As discussed in Section 4, RLFF used a thorough and systematic process to identify a set of identified priority and special opportunity areas for acquisition through PWC. Since the process used a broad range of expert sources to map key areas, and the Strategy Book was used as guidance for individual grants, it is logical that acquired lands would match the protection priorities established by other organizations and agencies. In fact, it was difficult to find any prioritization schemes for California to use for cross-examination that were not already used in the PWC planning process.

While this mode of analysis is somewhat tautological, other organizations and agencies did rank many of the PWC acquisitions as high priorities. For a little under half of the grants, including roughly 35% of the acreage and 44 % of grants, grantees identified other organizations' priority rankings that listed their acquisitions as a high priority for protection. These rankings included priorities set by the BLM, U.S. Fish and Wildlife Service, California Department of Fish and Game, California State Parks, NatureServe, The Nature Conservancy, and the Conservation Biology Institute. Certain acquisitions also fell within areas identified in other statewide or regional conservation plans or policies, such as the proposed California Wild Heritage Act, the South Coast Missing Linkages Project, the Upper Cosumnes River Watershed Strategic Plan, and the Coachella Valley Multiple Species Habitat Conservation Plan. In some cases, an acquisition was identified as a priority by several groups. For example, Napa Ranch, which is discussed further below, was considered a high priority for protection by NatureServe, the Information Center for the Environment, and The Nature Conservancy.

Some grantees also based their acquisitions on systematic prioritization schemes or existing strategic plans. For example, the Wilderness Land Trust acquisitions were based on a predetermined prioritization of inholdings. All of the acquisitions undertaken by Friends of the Desert Mountains, including 14,313 acres acquired with PWC funding, were priorities of the Coachella Valley Multiple Species Habitat Conservation Plan, a regional conservation plan that seeks to establish a 725,000-acre Reserve System, including 244,000 acres of lands to be acquired by the agencies and NGOs in the area.

## Areas with High Levels of Activity

We examined five areas of particularly high PWC acquisition activity and correlated them with places that other analysts have suggested are important for conservation investment. Table 5.1 identifies the variety of agencies, organizations, and multi-party plans that have prioritized areas where PWC awarded more than four grants, acquired the most acreage, purchased a large number of parcels and/or awarded the most funds. Overall, there is a good relationship between these external assessments and places where PWC invested the most.

- **The Desert.** Many of the highest areas of acquisition activity were places within the desert areas of California, and a number of our interview respondents considered this a unique and valuable component of the PWC program. Some noted that the Desert has a more fragmented landownership pattern, including checkerboard patterns within protected areas, which leave them vulnerable to patchwork development. According to one respondent, “The Desert has had more of a history of these cycles of threats from livestock grazing, mineral development and now it’s renewable energy development. Based on their proximity to the millions of people in the southern California area, they are the ones that are more likely to be first influenced by changes in the dynamics of the country.” Indeed, several respondents noted that demands for domestic sources of energy may lead to the “glassification” of the Desert, with more than a million acres in solar, wind and geothermal developments proposed for BLM lands.

  Others pointed to the challenge of raising money to support work in the desert. According to one, “The Desert is kind of an orphan in terms of support for environmental programs ….Coastal California for the most part is pretty easy to get money from people who want to support it. But the Desert is hard to sell. A lot of people think about the Desert as a place where – well it’s all federally owned so why do we need to protect any more of the land there. The answer is that the government owns all the high and dry stuff and the private ownership extends into all the riparian areas and all those areas that are really important for biodiversity. So we really need money to focus on acquiring those pieces that are important for biodiversity. … I think that the PWC money that went to the Desert is really an important piece of the program.”

*Table 5.1: Relationship between PWC areas of high acquisition activity & others' assessments*

| | PWC Strategy Book Areas where acquisition activity was highest | | | | |
|---|---|---|---|---|---|
| **Organization, agency, or plan that identified area as a high priority for acquisition** | Cache Creek Watershed | Joshua Tree & Death Valley National Parks & Mojave National Reserve | Anza-Borrego State Park | Upper Santa Margarita Watershed | Priority Desert WAs (incl. Cady Mts, Santa Rosa, Mecca Hills, Orocopia Mts) |
| BLM (Resource Management Plans) | ✓ | | ✓ | ✓ | ✓[1] |
| CA Dept of Fish and Game | ✓ | | | ✓ | |
| California State Parks | ✓ | | ✓ | | |
| Coachella Valley Multiple Species Habitat Conservation Plan | | ✓ | | | ✓[2] |
| Fish and Wildlife Service | | | | ✓ | |
| Friends of the Desert Mountains | | ✓ | | | ✓ |
| Information Center for the Environment | ✓ | | | | |
| Mojave Desert Land Trust | | ✓ | | | |
| Multiple Species Habitat Conservation Plan for Western Riverside County | | | | ✓ | |
| National Park Trust | | ✓ | | | |
| NatureServe | ✓ | | | | |
| Proposed California Desert and Mountain Heritage Act | | ✓ | | ✓[3] | ✓[4] |
| South Coast Missing Links Project | | | ✓ | ✓[3] | |
| The Nature Conservancy | ✓ | ✓ | ✓[5] | | |
| UNESCO (Desert Biosphere Reserve) | | | ✓ | | |

[1] Cady Mts - BLM West Mojave Plan; [2] Orocopia Mts, Mecca Hills, Santa Rosa; [3]Beauty Mountain; [4]Orocopia Mts, Santa Rosa Mts; [5]TNC Sonoran Desert-Peninsular Range Linkage Strategy

## Bigger Isn't Always Better: The Value of Small Parcels and Inholdings

Many of the acquisitions in the Desert consisted of small, isolated parcels, and PWC's overall portfolio of acquired lands includes many small and only a few large parcels. Overall this pattern reflects PWC's strategic rather than acreage-driven approach to acquisition. Over 570 individual parcels of land were acquired with PWC funding, and these ranged in size from half an acre to 12,575 acres. On average, properties acquired in the Desert were smaller private inholdings, while those acquired in the Sierra Nevada and North Coast regions were larger ranches or timber company properties. But even across the state, most parcels acquired were less than 500 acres and well over half were less than 50 acres. Only four acquisitions were larger than 5,000 acres. These are the 12,575-acre Napa Ranch in the North Coast, the 9,576-acre Parker Ranch conservation easement in the southern Sierra, the 9,500-acre Goose Creek timber company property in the Smith River National Recreation Area in the North Coast, and the 8,881-acre Cathton Property in the Desert. (All of these acquisitions were partially funded by PWC, and the Goose Creek acquisition was assisted through two loans.)

While people often presume that creation of a national park or preserve creates large contiguous blocks of protected area, in fact, many preserves are boundary lines containing a mix of public and private lands.  For example, the California Desert Protection Act of 1994 increased protections for over seven million acres of Desert wild lands. The parks, preserves, wilderness, and wilderness study areas created by the Act, however, were only partially protected. Privately-owned inholdings within these parks and wilderness areas threaten the ecological integrity of these protected lands. As one respondent described, "Environmentalists walk around making all these wilderness areas and then walk away and leave the agencies to figure out how to take care of the inholdings." Indeed, this respondent claimed that there was a quarter of a million acres of inholdings within the BLM and NPS lands in the Desert, involving in excess of 3000 landowners.

Several respondents described the problems of small inholdings.  According to one, "In the Carrizo Plain National Monument, the BLM wanted to do 2-3 big deals because they had Land & Water Conservation Fund money they had to spend.  But the big problem was the hundreds of quarter or half acre lots.  People were putting trailers out there, other things that were inappropriate. … There is a huge need to acquire these inholdings because they are presenting all sorts of problems – real threats – to parks and wilderness." According to another, "Picking up isolated parcels in wilderness areas when they become available, before they become converted to whatever they become converted to. Sometimes it's backcountry retreats, sometimes it's access to minerals. But particularly in the Southern California Desert, where there is not designated wilderness, it truly is a checkerboard land ownership pattern. And even though Congress has designated all federal lands within some line to be wilderness, if it's half-owned by private parties, who's really managing the lands?"

Others indicated that it is the smaller parcels that are most likely to be developed, and then have the largest impact on adjacent lands.  According to one, "The smaller the parcel the easier it is to develop. In other words it's more critical in some ways to get some of these small parcels. But the work is grueling... You get a series of 5 10-acre parcels, well you've got 50 acres. Those are the more likely ones that someone's going to put a trailer on, put a road in. I've seen that personally… It's always those smaller parcels that are a problem. …"

Many of our respondents pointed to the lack of interest by others in these small parcels. According to one, “There’s no glory in going out and picking up 2/10 of an acre of land in Carizzo, or 5 acres on the east Mojave… people like TNC and others look for the big acquisitions.” Said another, “The big land trusts traditionally wouldn’t touch those because they couldn’t make the money they needed to make by reselling them to public agencies. So smaller transactions have really fallen by the wayside – that’s why we continue to have such issues like home-site development in a national park, mining, and other problems.”

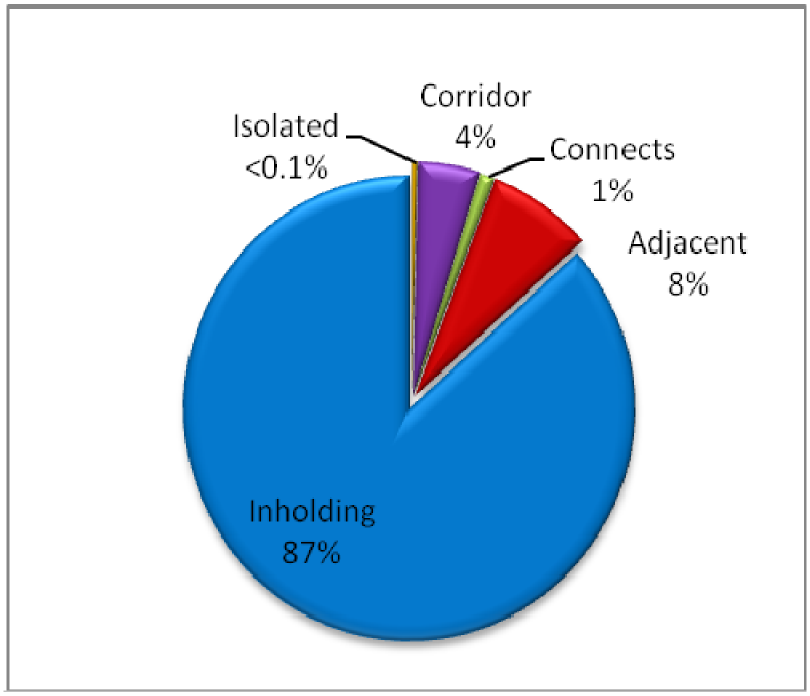
Ultimately, many give credit to RLFF in its focus on purchasing strategically-located smaller inholdings. One commented, “A major impact that PWC has had is their general commitment to volume, to doing a lot of deals, to getting them done. Instead of putting all the money into doing a few big monster Hearst Ranch-type acquisitions, to really focus on doing the little stuff that no one has focused on.” Noted another, “PWC has been steadfast in its support of picking up these parcels when they become available and thus assuring that the investment already made in designating wilderness will, in fact, create wilderness. It’s critical stuff.”

### *Increased Amount and Integrity of Protected Areas*

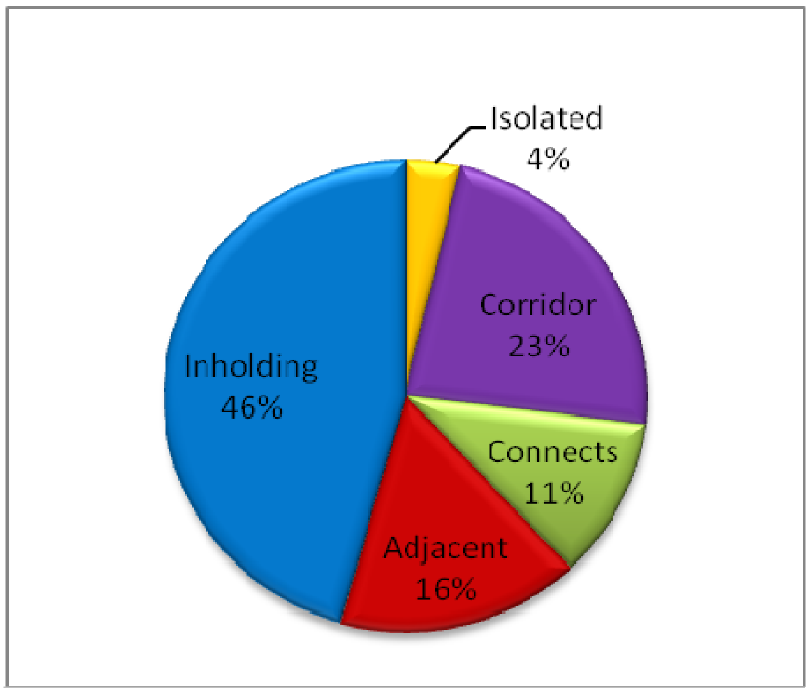
*5.3 PWC acquired land within, adjacent to, or between an impressively large set of existing protected areas throughout California. This strategic placement of acquisitions increases the size, integrity and connectivity of existing wilderness areas, wild and scenic rivers, and state and national parks.*

Another way to assess the conservation value of acquired lands is to look at how they relate to other protected areas since less fragmented and larger areas are usually the most valuable for conservation purposes. From our assessment, it seems clear that almost all of the parcels acquired with PWC funding were strategically located within, adjacent to, or between existing protected areas (Figures 5.6 and 5.7). More than 85% of the estimated parcels acquired across the State (almost 65,000 acres) are inholdings, privately owned land nestled within existing protected areas. More than half of the remaining parcels are adjacent to an existing protected area or directly connect two or more areas. The rest (4% of all parcels) are located in a broad mixed-ownership corridor between larger protected areas. These include parcels acquired within the Redwood-to-the-Sea corridor or South Coast Missing Linkages, discussed below. In terms of acreage, most are inholdings (46%), followed by land within corridors (23%), and land adjacent to one (16%) or more (11%) existing protected areas.

We categorized only two of the parcels as “isolated” in that they were not connected to an existing protected area or part of a larger corridor of potential protection. One was the 366-acre Buckeye Ranch in the Sequoia Foothills of the Sierra Nevada, which was protected through purchase of a conservation easement. It had been identified as a priority in a Sequoia Foothills conservation plan developed by The Nature Conservancy and the Sequoia Riverlands Trust, which if coupled with future acquisitions would provide connectivity from Giant Sequoia National Monument to the Central Valley. The other was the 4,915-acre Cow Creek property that was protected by a conservation easement funded jointly by PWC and the California Wildlife Conservation Board. It is located not too far from the Lassen Foothills priority area in the Modoc region.




***Figures 5.6: Placement of acquired <u>parcels</u> relative to existing protected areas***




***Figures 5.7: Placement of acquired <u>acreage</u> relative to existing protected areas***

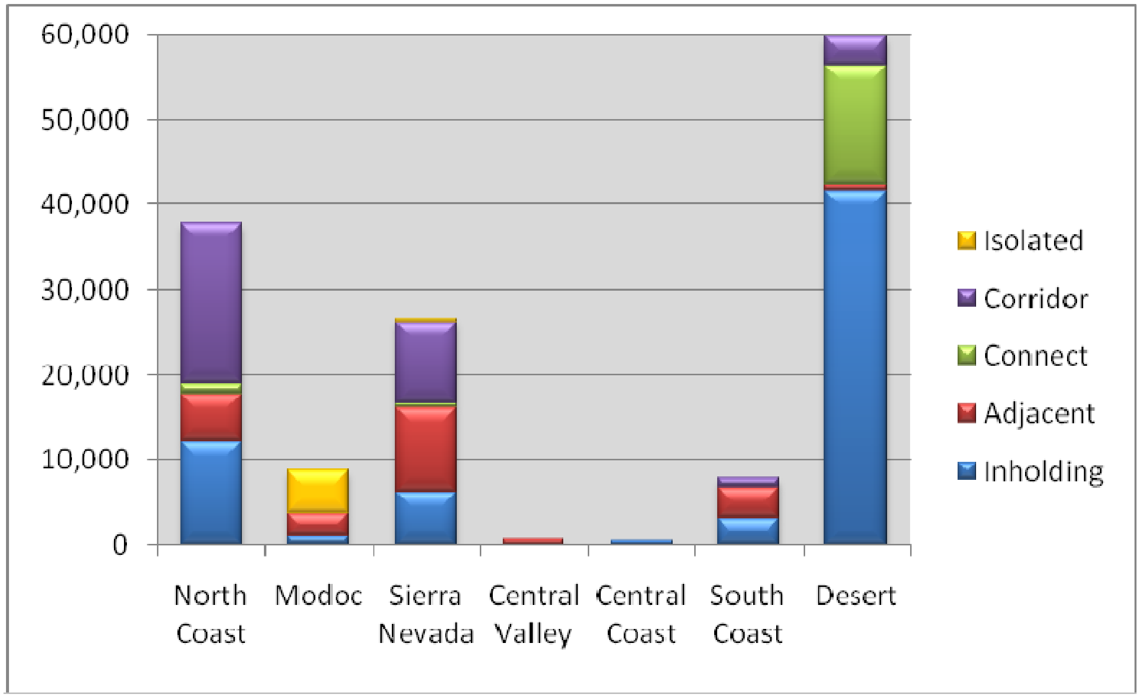



***Figure 5.8: Placement of acquired acreage by region***

Regions differed in how acquired lands were located relative to other protected areas (Figure 5.8). For example, Desert acquisitions focused more on inholdings while North Coast protection relied more on acquisitions within corridors. Indeed, most of the inholdings and lands connecting two or more protected areas were acquired in the Desert (64% of total inholding acreage; 90% of connecting acreage), most of the corridor-type acquisitions were in the North Coast (58%), and most of the land directly adjacent to a protected area was acquired in the Sierra Nevada (43%). Still, in regions where many acquisitions were made (Desert, North Coast, Sierra Nevada), a mix of parcel types was acquired, suggesting a rounded strategy and that PWC was not overly inholding-focused.

The acquired lands completed, expanded and connected an impressively long list of existing protected areas throughout the state, including a wide variety of protected area types from wilderness areas to state and national parks to NGO-reserves. As Table 5.2 shows, PWC affected more than eighty different protected areas across the state, including thirty-six in the Desert alone. By being strategic in purchasing land that related to existing protected areas, almost all of the acquisitions can be seen as generating one of five main conservation outcomes, which we describe further below:

- Existing wilderness areas were protected through acquisition of inholdings
- Existing wilderness areas were expanded through acquisition of adjacent lands
- Wilderness study areas were “cleaned up” to enhance their protection and promote their designation as wilderness
- Parks and similar protected areas were expanded, or inholdings were purchased
- Rivers were protected by acquisition of riverfront or adjacent property

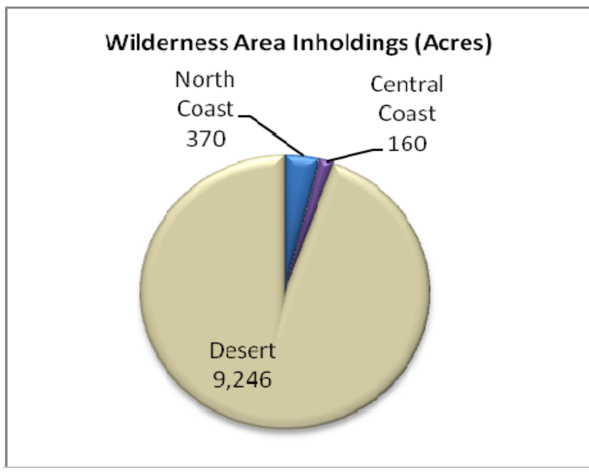
*Table 5.2: Protected areas affected by PWC acquisitions*

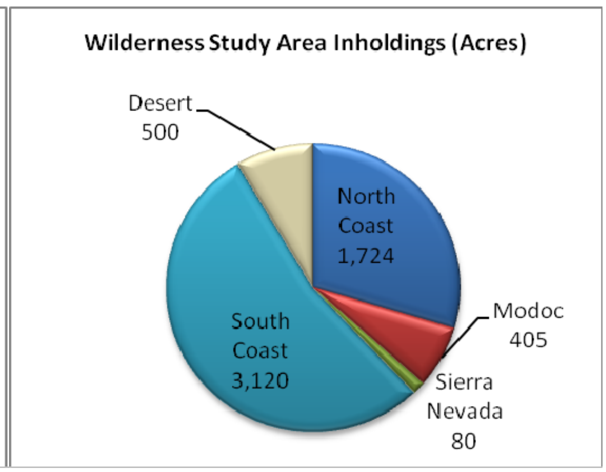
| | *National Parks & Monuments, National Forest & State Parks* | *Wilderness Areas & Wilderness Study Areas* | *Other Protected Areas* |
|---|---|---|---|
| **Central Coast** | Carrizo Plain NM | Ventana WA | |
| **Central Valley** | | | BLM lands<br>Pixley NWR |
| **Desert** | Anza-Borrego Desert SP<br>Death Valley NP<br>Joshua Tree NP<br>Mojave National Preserve<br>Santa Rosa NM<br>San Jacinto Mountains NM | Anza-Borrego Desert St WA<br>Cadiz Dunes WA<br>Cady Mountains WSA<br>Chuckwalla Mountains WA<br>Dead Mountains WA<br>Domeland WA<br>El Paso WA<br>Grass Valley WA<br>Jacumba WA<br>Kelso Dunes WA<br>Mecca Hills WA<br>North Algodones Dunes WA<br>Old Women Mountains WA<br>Orocopia Mountains WA<br>Owens Peak WA<br>Palen/McCo WA<br>Piute WA<br>Rice Valley WA<br>Santa Rosa WA<br>Sawtooth Mountains WA<br>Sawtooth Mountains WSA<br>Sheephole Valley WA<br>Soda Mountains WA<br>South Nopa Range WA<br>Stepladder Mountains WA | BLM lands<br>Big Morongo ACEC<br>San Sebastian/San Felipe Creek ACEC<br>Coachella Valley Fringe-toed Lizard Preserve<br>Coachella Valley Multiple Species Habitat Conservation Plan (MSHCP) Reserve |
| **Modoc** | | Ishi WA<br>Lassen Volcanic WA<br>Mt. Shasta WA<br>Timbered Crater WSA<br>Tunnison Mountain WSA<br>South Warner WA & WSA | Big Chico Creek Eco Reserve<br>Dye Creek Preserve (TNC)<br>Tehama Wildlife Area |
| **North Coast** | Humboldt Redwoods SP<br>Robert Louis Stevenson SP | Arcata Wildlife Sanctuary<br>Berryessa Peak WSA<br>Cache Creek WA<br>Elkhorn Ridge WA<br>King Range WA<br>Trinity Alps WA<br>Yolla Bolly WA | BLM land<br>Knoxville Wildlife Area<br>Wildlake Ranch<br>Montgomery Woods St Res<br>Smith River Natl Rec Area |
| **Sierra Nevada** | Eldorado NF<br>Giant Sequoia NM<br>Sequoia NF, Sierra NF<br>Tahoe NF, Yosemite NP | Castle Peak WA<br>Kiavah WA<br>Sacatar Trail WA<br>Granite Mountains WSA<br>Bright Star WA | BLM land<br>Kern River Preserve (NAS)<br>North Fork American WSR |
| **South Coast** | Anza-Borrego Desert SP | Beauty Mountain WSA<br>Hauser WSA | BLM Land<br>Santa Margarita Eco Reserve |

## Expanding Wilderness by Acquiring Lands Within Existing Designated Areas

While designated wilderness is the highest level of land protection, PWC recognized that wilderness was only protected if inholdings were also managed as wilderness so that they did not pose a threat to the integrity of the larger area. As noted above, acquiring inholdings within wilderness areas was a focus of PWC acquisitions, and almost 10,000 acres of inholdings were acquired in existing Wilderness Areas, mostly in the Desert (Figure 5.9).

- **Desert wilderness inholdings.** Acquisition of inholdings within Desert wilderness areas was clearly a priority for PWC. RLFF identified sixteen wilderness areas and four wilderness study areas as priorities for acquisitions under their Desert land protection strategy. They also identified twelve wilderness areas as special opportunity areas that help to link together existing protected areas and contain unique value. As the program developed, RLFF found it more efficient to include all Desert wilderness areas with inholdings which increased the number of target areas to 34. Inholdings were acquired in at least eight Desert Wilderness Areas (five of them priority areas) and 14 Wilderness Study Areas (nine priorities). One wilderness area where inholdings were acquired, Santa Rosa Mountains, is made up of bighorn sheep habitat. Preserving peninsular bighorn sheep habitat was another important priority for PWC.




***Figures 5.9 and 5.10: Acquisition of inholdings in Wilderness and Wilderness Study Areas***

## Expanding Wilderness Administratively by Acquiring Adjacent Lands

By acquiring land adjacent to designated wilderness areas, PWC also expanded wilderness administratively. As one respondent explained, "The 1964 Wilderness Act, Section 6, says that properties that are donated that are adjacent to a wilderness area may become part of the wilderness by sending a notice to Congress and having the Senate and House hold it for 60 days. Once that time period expires, it becomes wilderness. … We've got 4 or 5 of those in the works. It took a little bit of doing because it was foreign to the agencies."

PWC has been able to expand wilderness in this fashion in several cases, including Spencer Meadows, 80 acres of wet meadow adjacent to designated wilderness in the Lassen Volcanic National Park. This PWC-funded Wilderness Land Trust acquisition will be donated to the

National Park Service for incorporation into the wilderness area, averting its sale for timbering and development and eliminating a need for a cherry-stem road. Friends of the Desert Mountain are also making use of this little known tool to add lands abutting Desert wilderness areas.

- **Ishi Wilderness.** One of the best examples of PWC's use of targeted acquisitions to expand wilderness administratively is in the Ishi Wilderness in the Lassen Foothills of the Modoc Plateau (Figure 5.11). Characterized by rugged canyons and blue oak/gray pine woodlands and home to the largest migratory deer herd in California, the wilderness area is bisected by two salmon streams that support three distinct, wild runs of Chinook salmon and steelhead trout. With PWC funding, the Shasta Land Trust acquired 648 acres in two parcels adjacent to the wilderness area and donated them to the Forest Service. As future additions to the wilderness area, these acquisitions provide additional protection and improve management of the area, while establishing a linkage from the wilderness area and the Lassen National Forest to the Sacramento River National Wildlife Refuge. In addition, PWC funded the Northern California Regional Land Trust to purchase an additional 1,080 acres of conservation easement to buffer the western boundary of the Ishi Wilderness Area from incompatible uses. When combined with acquisitions made by The Nature Conservancy as part of its large Lassen Foothills Project, the net effect of this set of acquisitions is the protection of more than 16,500 acres of critical habitat.

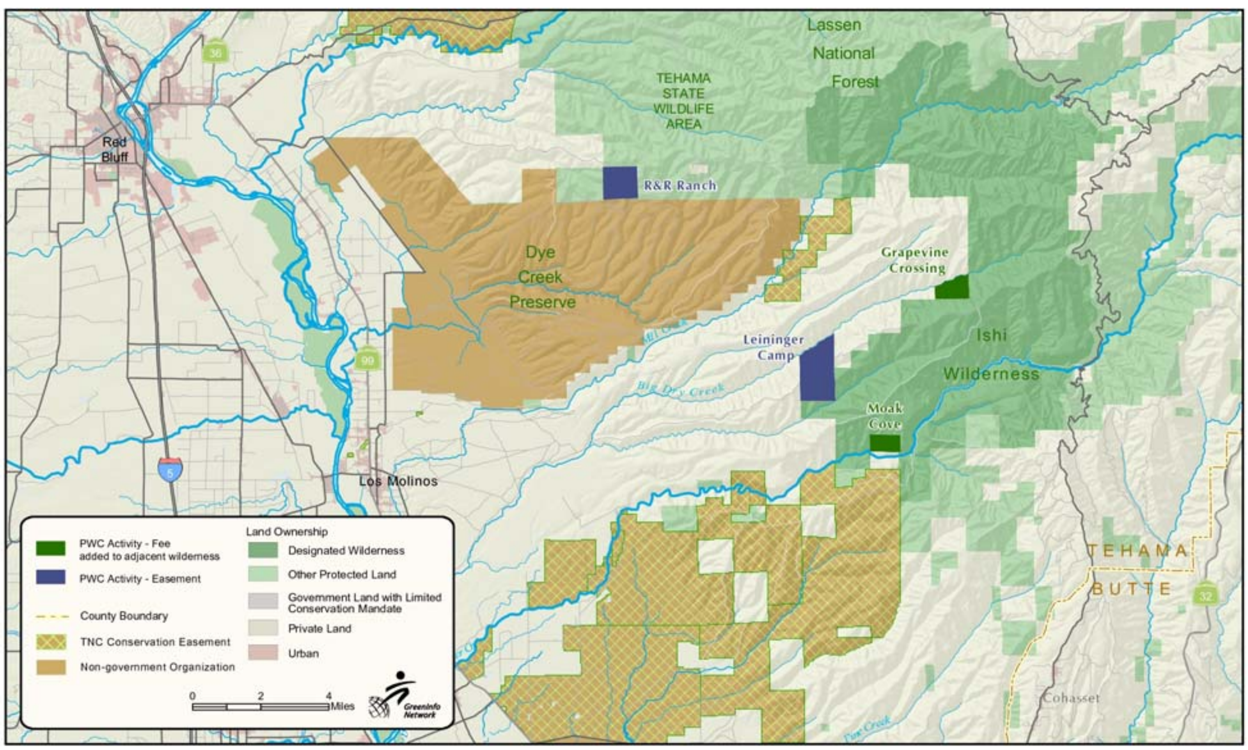



***Figure 5.11: Administrative additions to the Ishi Wilderness Area***

## “Cleaning Up” Areas to Promote Wilderness Designation

One of the major ripple effects of acquiring even relatively small parcels within Wilderness and Wilderness Study Areas was to increase the likelihood of expanding designated wilderness. PWC took a particularly unique approach to expanding wilderness by acquiring parcels that would be a barrier or deterrent to future wilderness designation. As one observer commented, PWC’s acquisition of key inholdings helped “remove these private land issues that designators are particularly sensitive to.” In total, almost 6,000 acres of inholdings were acquired with PWC funds in Wilderness Study Areas, especially in the Beauty Mountain WSA in the South Coast and Elkhorn Ridge in the North Coast, both key cases discussed below that affected wilderness designation (Figure 5.10).

In some cases, inholdings were completely eliminated from a Wilderness Study Area. For example, two inholdings totaling 195 acres were acquired in Timbered Crater WSA in the Modoc region. The Timbered Crater WSA is bounded by the Shasta Trinity National Forest, the Ahjumawi Lava Springs State Park and private agricultural lands. Located approximately one mile from the center of the WSA, these properties had the potential to be used for timber harvesting and ranching and were the only inholdings within the unit.

According to one respondent, there are multiple benefits associated with “cleaning up” existing WSAs: First, “To make them a more compelling case … to help Congress to better decide which areas they ought to make wilderness because the inholdings have been taken out.” Second, it assures greater likelihood of long term protection once the wilderness designation is made. “You lose a lot of the attention on these once they get designated. People think they’re protected and they go on to finding more areas.” As another respondent commented, “The work done on acquiring inholdings in potential wilderness areas was really important. On a scorecard of acres, it probably only shows up as a very small number of acres. But buying a 640 acre inholding within a 60,000 acres wilderness area -- where that inholding is one significant barrier to designating wilderness -- if that facilitates protection of the area, that is a really big gain. Strategic acquisitions that facilitate protection of broader landscapes have an impact far beyond the scope of your limited investment.”

Two areas where PWC had the greatest impact in expanding wilderness designation through sets of strategic acquisitions were the South Fork of the Eel River in the northwest corner of Mendocino County, and Beauty Mountain WSA, west of Anza-Borrego in the South Coast.

- **Elkhorn Ridge Wilderness Area.** Before the Northern California Coastal Wild Heritage Wilderness Act was signed into law in 2006, PWC-funded work by the Wilderness Land Trust succeeded in eliminating all of the inholdings within Elkhorn Ridge, one of the new designations within that Act and a key watershed for the South Fork of the Eel River. WLT made fourteen PWC-funded acquisitions amounting to 1,564 acres and thereby made the designation of the area “more appealing to elected officials, because they were able to go forward with the confidence that they weren’t trapping any private landowners within wilderness areas,” according to one respondent. These acquisitions “removed one of the political impediments to designating certain areas as wilderness, with a significant contribution to getting that Act passed.”

- **<u>Beauty Mountain WSA.</u>** Beauty Mountain is located between the Palomar Mountain Range and the Anza-Borrego Desert State Park within the Upper Santa Margarita River Watershed, a PWC Special Opportunity Area (Figure 5.12). One of the largest tracts of undeveloped land remaining near Temecula, a rapidly growing city between San Diego and Los Angeles, Beauty Mountain was slated for development. Instead, a PWC investment of approximately $11 million involving four grants to The Wilderness Land Trust and The Conservation Fund resulted in more than 8,000 acres of acquisitions and leveraged more than $11 million of federal and state dollars. These acquisitions consolidated public ownership in the area and promoted the designation of the 15,621-acre Beauty Mountain Wilderness when the California Desert and Mountain Heritage Act passed as part of the Omnibus Public Land Management Act of 2009.

  The WLT purchased 1,360 acres of inholdings in the Beauty Mountain Wilderness Study Area with a 2004 PWC grant. The California Desert and Mountain Heritage Act was introduced just months later and included provisions to designate the Beauty Mountain Wilderness. One observer noted that once Beauty Mountain was mostly in public ownership, “it became clear that it was a candidate for designation as wilderness. … That wouldn’t have happened without PWC. It’s clearly black and white in that case.”

  Additional PWC-supported acquisitions continued to consolidate BLM ownership and expand the area eligible for designation. The WLT purchased a 962-acre inholding in partnership with the California Wildlife Conservation Board, which also acquired 3,244-acres of land adjacent to the WSA. The Conservation Fund acquired the 1,025 Rainforest Ranch, on the southern boundary of the BLM Beauty Mountain Management Area, as well as 1,500 acres of Cooper Canyon inholdings in the Management Area. With these acquisitions, “all orchestrated by PWC, the whole place was blocked up,” avoiding becoming a fragmented mix of subdivisions and BLM land.

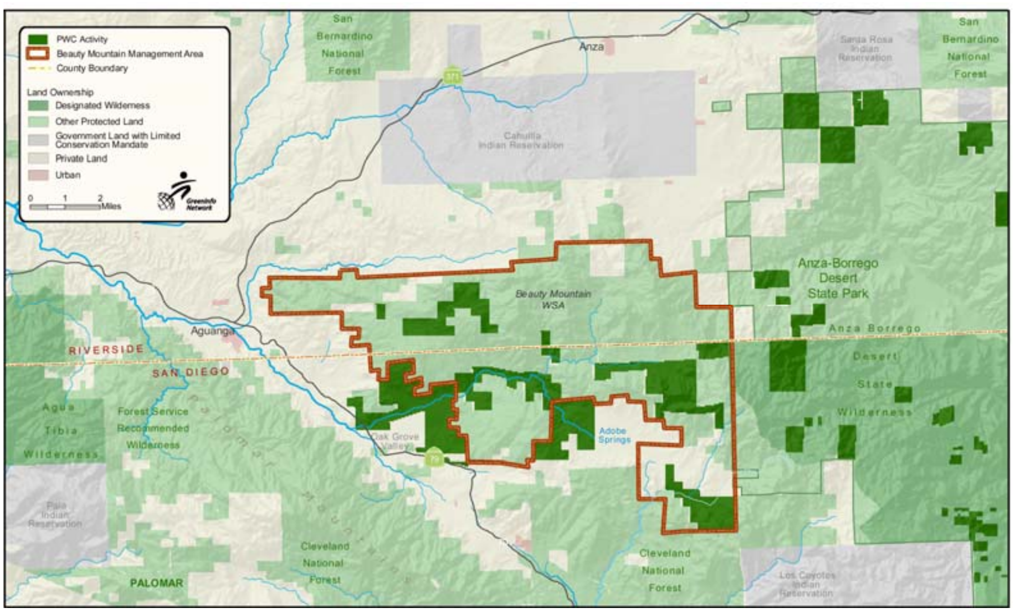



***Figure 5.12: Acquisitions in the Beauty Mountain Wilderness Study Area***

## Expanding Parks and Protected Areas

Beyond its focus on federally-designated wilderness areas or potential areas, RLFF also funded PWC acquisitions that contributed to expanded protection at a number of national and state parks, national forests and similar protected areas.

- **Anza Borrego State Park.** With over 600,000 acres, Anza Borrego State Park is California's largest state park and one of PWC's priority areas, because of the 35,000 acres of high conservation value private land that remains within or abutting the park's boundary. Several PWC grants to the Anza-Borrego Foundation and one to the Conservation Fund resulted in acquisition of over 9,000 acres inside or adjacent to the park. San Felipe Ranch, an additional 7,400 acres adjacent to the west boundary of the park, was acquired with Wildlife Conservation Board funding. 6,300 acres of the PWC acquisitions will become part of the state park, including about 95 acres in the Anza-Borrego Desert State Wilderness.

  Land parcels adjacent to the park directly connect it with other protected areas. The 2,080-acre Tulloch acquisition links the state park with the Cuyamaca Rancho State Park. Similarly, the Vallecito Ranch fills an unprotected gap between the state park and the Sawtooth Mountains Wilderness Area and Wilderness Study Area, thus protecting and expanding a wildlife corridor for mountain lions and bighorn sheep. The 1,880-acre Cottonwood acquisition connects the Sawtooth Mountains Wilderness Study Area with the Oriflame Mountains and Cuyumaca Rancho State Park, and the WCB-funded San Felipe Ranch acquisition protects the headwaters of San Felipe Creek that flows through the park to the Salton Sea.

- **Desert National Parks.** As discussed above, PWC invested highly in the Desert National Parks. To date, approximately 19,000 acres of high priority inholdings were acquired within Joshua Tree National Park, Mojave National Preserve, and Death Valley National Park by the National Park Foundation (NPF) and the Mojave Desert Land Trust (MDLT). NPF began the acquisitions, acquiring at least 96 parcels and 6,530 acres, and MDLT continued the work within the framework created by NPF and has acquired 145 parcels totaling 12,616 acres. PWC investments leveraged additional acquisitions of more than 7,000 acres, including funding from the Castle Mountain Mine Fund and the Land and Water Conservation Fund.

  Nolina Peak, a 638-acre acquisition adjacent to Joshua Tree National Park, has had multiple beneficial outcomes. On the northern boundary of Nolina Peak is BLM Section 10 which has been categorized as "surplus land" in danger of being sold to become part of expanding development in Yucca Valley. With the acquisition of Nolina Peak by the MDLT and its transfer to the National Park Service, Section 10 becomes contiguous with the park boundary and can be transferred by the BLM to the NPS, completing the protection of Quail Mountain and its watershed. The Nolina Peak purchase also built local support and confidence in the work of the MDLT and made it more likely that they will complete additional acquisitions in the future.

- **<u>Goose Creek in the Smith River National Recreation Area</u>**. With support from PWC, the Western Rivers Conservancy (WRC) was able to secure the protection of 9,500 acres of timber company land along Goose Creek, the last inholdings of the Green Diamond Resource Company within the Smith River National Recreation Area (Figure 5.13). Goose Creek is the principal tributary to the Smith River, California's only remaining free-flowing major river and habitat for the state's healthiest runs of steelhead, coastal cutthroat trout, and Chinook salmon. The acquired land was scheduled for commercial logging and road-building, which would have posed significant sedimentation problems in the river. Instead, the land was transferred to the U.S. Forest Service for incorporation into the NRA, allowing the forest to mature toward old-growth conditions, and protecting water quality and fisheries habitat.

  PWC funds supported an innovative approach taken by WRC and its partner organization, the Smith River Alliance (SRA), as they worked together over six years to acquire the lands and develop long-term management objectives. PWC provided a combination of loans and grants that enabled WRC to extend their purchase option, thus "buying" critical time to increase financial and public support. WRC borrowed money to purchase the land and helped to secure LWCF appropriations for its purchase. This approach required WRC and SRA to work closely with key decision-makers and to divide the transaction into three phases, spreading the appropriations across several years. Fortunately, Green Diamond was a willing and flexible seller and agreed to a multiple-phase transaction. PWC funds also supported WRC and SRA's ongoing interactions with the Del Norte County Board of Supervisors—interactions that were crucial for securing the Board's support and alleviating its concerns about lost property tax revenues. The largest remaining block of private lands within the Smith River NRA is the Hurdygurdy Creek property, which is still in progress for acquisition funded partially by PWC.

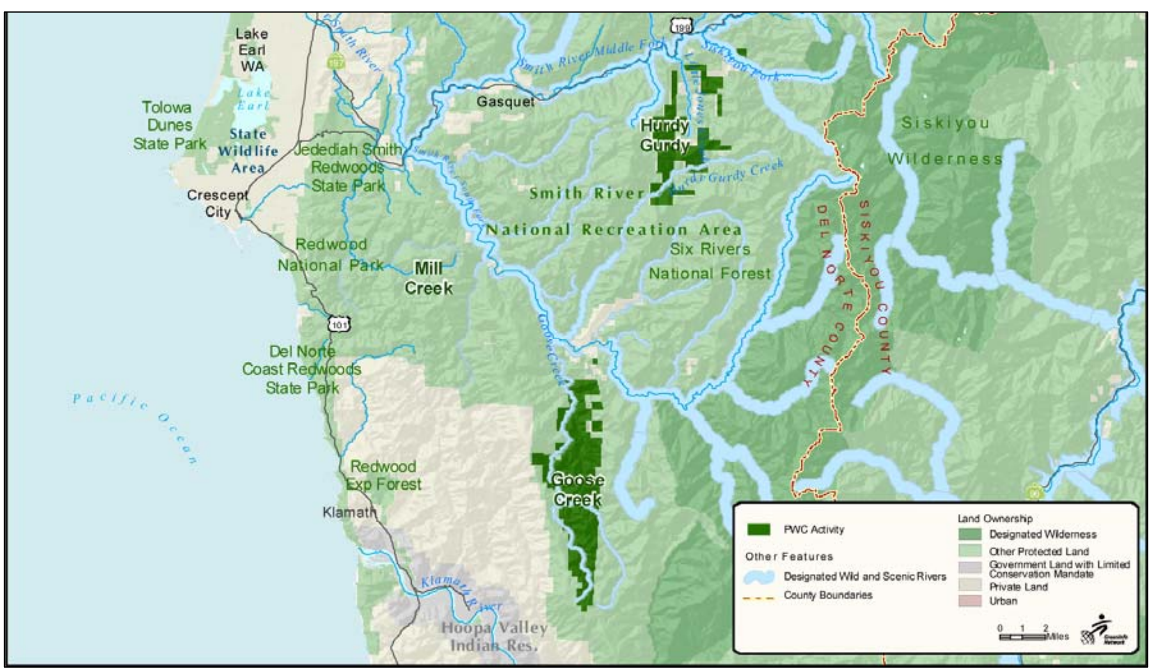



***Figure 5.13: Acquisitions in the Smith River National Recreation Area***

## Expanded Protection for Rivers

Several PWC-funded acquisitions improved or expanded the protection of rivers. In particular, several acquisitions further protected designated Wild and Scenic Rivers by acquiring private lands within designated river corridors. For example, PWC awarded two grants for acquisitions along the North Fork of the American River, a Wild and Scenic River. The American River Conservancy was able to protect two miles of river frontage and provide a significant wildlife linkage between the 19,000 acre Folsom State Recreation Area and the 26,000 acre Auburn State Recreation Area. Building on this effort, PWC then funded another acquisition within North Fork American Wild and Scenic corridor, protecting a 640-acre timber company property.

Other acquisitions increased a river's eligibility for Wild and Scenic designation. For example, a 146-acre parcel on the Rubicon River in the Sierra Nevada was acquired by the Trust for Public Land from a private timber company. The acquisition, which covers nearly a mile of river, will be managed as eligible for inclusion within the national Wild and Scenic River system upon transfer to the U.S. Forest Service. Two other notable cases of PWC acquisitions that increase the likelihood for increased river protection involve the Whitewater and Amargosa Rivers, both in the Desert.

- **Whitewater River.** The Friends of the Desert Mountains acquired a 217-acre Whitewater Canyon/Hays Ranch property in Riverside County, located in the Whitewater Canyon Area of Critical Environmental Concern. This property is adjacent to the Whitewater River, which has been deemed eligible for Wild and Scenic River status, and the portion of the land adjacent to the river would also be eligible. Building on this acquisition, with a later grant the Friends acquired an adjacent property, the 291-acre Whitewater trout farm property. This parcel is bound on the north by the San Gorgonio Wilderness and contains an approximately 0.75 mile stretch of the Whitewater River. Again, not only is this stretch of the river protected, but it is also more likely to be determined eligible to be part of the Wild and Scenic River system than before acquisition, when it had the potential to become a paintball and off-road vehicle recreation area.

- **Amargosa River**. The wetland and riparian habitats along the 125-mile long Amargosa River support a diverse array of plants and animals, many of which are endangered and threatened. One of only two rivers in the Mojave Desert, the Amargosa River is also a wilderness recreation area, a portion of which has been proposed to be a federally designated Wild and Scenic River. Grants were awarded for Amargosa River acquisitions, restoration, capacity building, planning, and policy work. Over 3,500 acres of land were acquired in the Amargosa River watershed, including two critical parcels acquired by The Nature Conservancy (TNC): the 2,500 acre Borax-Tecopa property abuts BLM land that is an Area of Critical Environmental Concern and the 217-acre China Ranch property, acquired as a conservation easement. The Nature Conservancy acquired an additional 160-acre parcel at the headwaters of a major tributary of the Amargosa River that was a prime development target. TNC acquisitions were combined with restoration work: over 130 acres of invasive tamarisk plants were eradicated, allowing for regrowth of native plants, which have already noticeably increased river flows.

## *Creating Landscape-Scale Protection*

*5.4 PWC acquisitions help to create large contiguous areas of protected lands which buffer the impact of threats including climate change, and create important habitat corridors.*

One of the unique aspects of the PWC program was its ability to focus at a landscape scale. At one level, that meant being able to invest acquisition dollars into projects all across the state. At another, it meant thinking about how to secure protection of key assemblages of contiguous and connected protected areas. Larger blocks of land are important for almost all values of wildlands, including biodiversity protection, recreation and solitude. Conservation biology provides a number of rules of thumb about biodiversity protection, and many of them point to the need to protect larger blocks of unfragmented habitat. In a state with overwhelming development pressures and the risk of catastrophic wildfires, that need is even greater. Climate change pushes the value of larger habitat blocks further, since larger blocks of connected lands allow the shifting or expanding of species' ranges, as well as simply increase the potential for recovery after events like a wildfire.

Even with extraordinary funding -- which PWC had -- wildlands protection interests can only buy a limited amount of acreage given the large size of the state and the cost of land. As a result, focusing on linkages and corridors between protected areas becomes an important strategy for leveraging acquisition dollars. By developing a better understanding of key linkages to guide land acquisitions, strategizing at a regional scale, and investing in clusters of activity in key California landscapes, RLFF and its grantees were able to advance landscape-scale protection in a number of key places.

### Larger Areas of Contiguous Protection

While PWC acquisitions included several large parcels of land (described above), in a number of places RLFF's investments – even in relatively small parcels – helped create larger blocks of lands buffered from development and the problems of fragmentation. For some areas, acquisitions helped smaller protected areas become functionally larger, which increases their ecological value, especially for edge-sensitive and wide-ranging species.

- **Montgomery Woods.** Montgomery Woods is a state reserve in Mendocino County that contains a beautiful and unusual stands of ancient redwoods. It is also situated in the Big River Watershed, which is within the PWC Special Opportunity Area of the Greater Mendocino Coast. PWC priorities within this area were to conserve large, industrial timberlands and to protect salmon-bearing rivers, such as the Big River.

  When Save-the-Redwoods League (SRL) began work on expanding Montgomery Woods with PWC funding in 2005, it was a relatively small park, just over 1,000 acres, with significant pressures for development of subdivisions on surrounding lands. SRL leveraged two PWC grants to generate a five-fold increase in funds for acquisition from public and private sources. Within three years, a series of four acquisitions not only more than doubled the size of the reserve, but connected it to existing protected areas: the BLM Late Seral Reserve and a private ranchland conservation easement. Together these acquisitions buffered the old-growth groves of the existing reserve, protected Coho and steelhead habitat in a Big River tributary, and increased habitat connectivity of the Upper Big River. They created an unbroken landscape of forest including redwood and Douglas-fir stands, oak woodland, and grassland that covers more than 5,400 acres. The lands purchased by SRL have been incorporated into the Reserve, achieving the highest level of protection possible under California State Parks ownership.

- **Kern River Watershed.** Using a $3 million PWC grant, the National Audubon Society acquired four properties in the Kern River watershed that totaled over 2,000 acres; other acquisitions by Audubon resulted in protection of more than 14,000 acres (Figure 5.14). As a result of one of the PWC-funded acquisitions, the Alexander Ranch, two federal grazing leases were acquired which provides habitat protection for 30,000 acres of BLM land through a non-use agreement. Overall, these acquisitions created a consolidated protected area along and extending out from the South Fork of the Kern River by linking together and expanding existing protected areas. PWC-funded acquisition of a conservation easement on the 9,576-acre Parker Ranch helped to provide a critical wildlife linkage from the Central Valley portion of the Tejon Ranch to the Kern River Valley. As with all PWC-funded acquisitions to the BLM, the 1,666-acre Cyrus Canyon property was transferred to the BLM with a donation agreement that limited construction of roads and structures and prohibits off-road vehicle use. Over $7 million of other funds were leveraged, including funding from Audubon, the Wildlife Conservation Board, and the California Department of Fish and Game. Among other environmental benefits, the protected areas provide habitat for the Southwestern Willow Flycatcher, a federally endangered species that nests in the riparian forests of the South Fork Kern River.

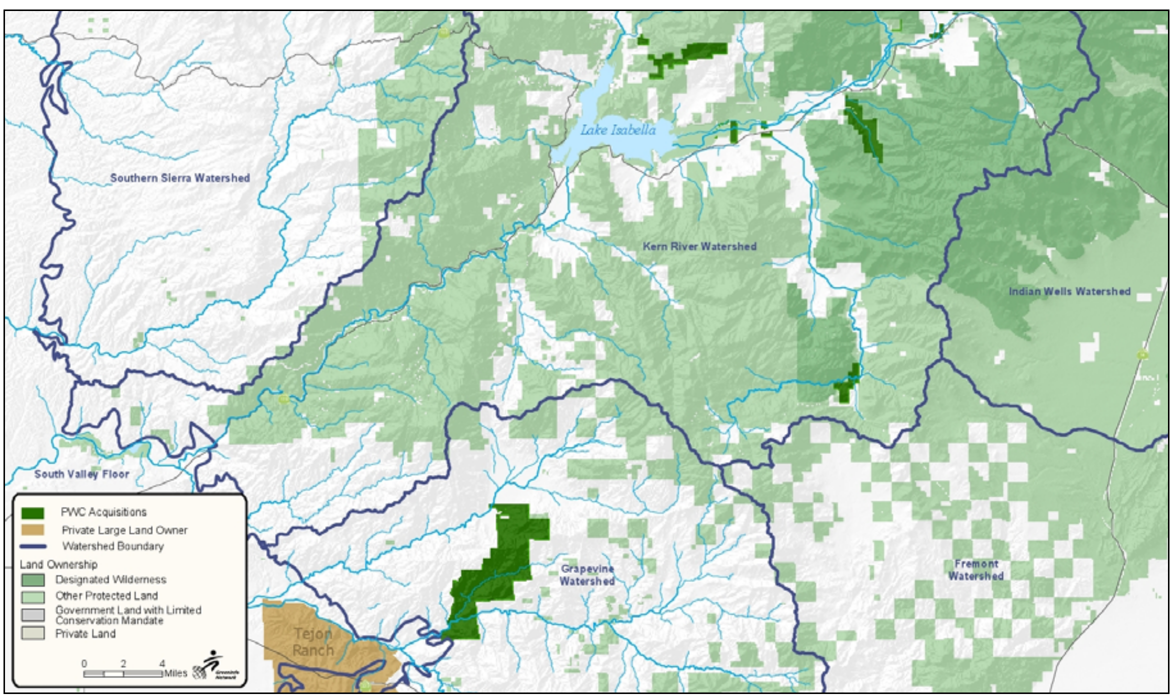



*Figure 5.14: Acquisitions within the Kern River watershed*

- **Napa Ranch.** The 12,575-acre Napa Ranch is the largest single parcel acquired with PWC support. In the heart of the Blue Ridge Berryessa Natural Area, Napa Ranch contains some of the richest biodiversity in the region, spanning oak woodlands, serpentine chaparral, and extensive riparian and cliff habitats. The ranch was acquired by the Land Trust of Napa County using funds from PWC, the Land and Water Conservation Fund, the State Coastal Conservancy and The Nature Conservancy. Adjacent to BLM lands and the 8,080-acre California Department of Fish and Game's Knoxville Ranch, the acquisition brings over 21,000 acres under permanent public protection as a CDFG wildlife area. It maintains approximately 40,000 acres of contiguous open space and 200,000 acres of contiguous land for wildlife habitat – large enough for the reintroduction of Tule elk to the area.

## Broad Landscape-Scale Corridors

Several acquisitions contributed to new and ongoing efforts to establish broad, landscape-scale linkages or wildlife corridors. Indeed, it became clear through interviews with program staff that establishing connectivity by building landscape-level linkages became one of the overarching goals of the acquisition program. As one said, "We always kept in mind how [a proposed acquisition] ties up to other protected areas. … We wanted to get away from what agencies do. They see a subdivision coming up, so they try to carve out 2000 acres for protection. But surrounded by houses, it really doesn't do much for the animals. It's nice open space for the people that live there but not a lot of conservation value. … So our intent was to really tie these large landscapes together."

Key linkages included connections between ecosystem types within a PWC region, such as the Redwoods to the Sea corridor in the North Coast. But many of the linkage areas on which PWC acquisitions took place were intersections between regions: the South Coast and the Desert (Upper Santa Margarita Watershed, Big Morongo areas); the southern Sierras, the South Coast, Central Coast and the Desert (Tehachapi's, Tejon Ranch, Kern River watershed areas); the North Coast, Central Valley and the Central Coast (Cache Creek and Blue Ridge Berryessa areas); and the Central Valley and the Modoc (Lassen Foothills area). Because biological diversity is often highest in zones of overlap between ecosystem types, these regional intersections are probably some of the most valuable areas to protect. An increasing focus by RLFF staff in these areas as the acquisition program unfolded made sense.

- **Redwoods to the Sea Corridor.** Two PWC grants totaling almost $2 million supported the long-term project of the Save-the-Redwoods League (SRL) to establish connectivity between the Humboldt Redwoods State Park (the largest contiguous reserve of ancient redwoods), Gilham Butte, and the King Range National Conservation Area (the longest roadless coastal stretch in the lower 48 states). SRL aims to create this landscape-scale corridor from the redwoods to the sea by "knitting together" protected areas through a combination of direct acquisitions, conservation easements and land trades. With PWC funding, SRL purchased several parcels in the Mattole River watershed – a PWC special opportunity area -- and several parcels adjacent to Humboldt State Park along the Eel River (Figure 5.15).

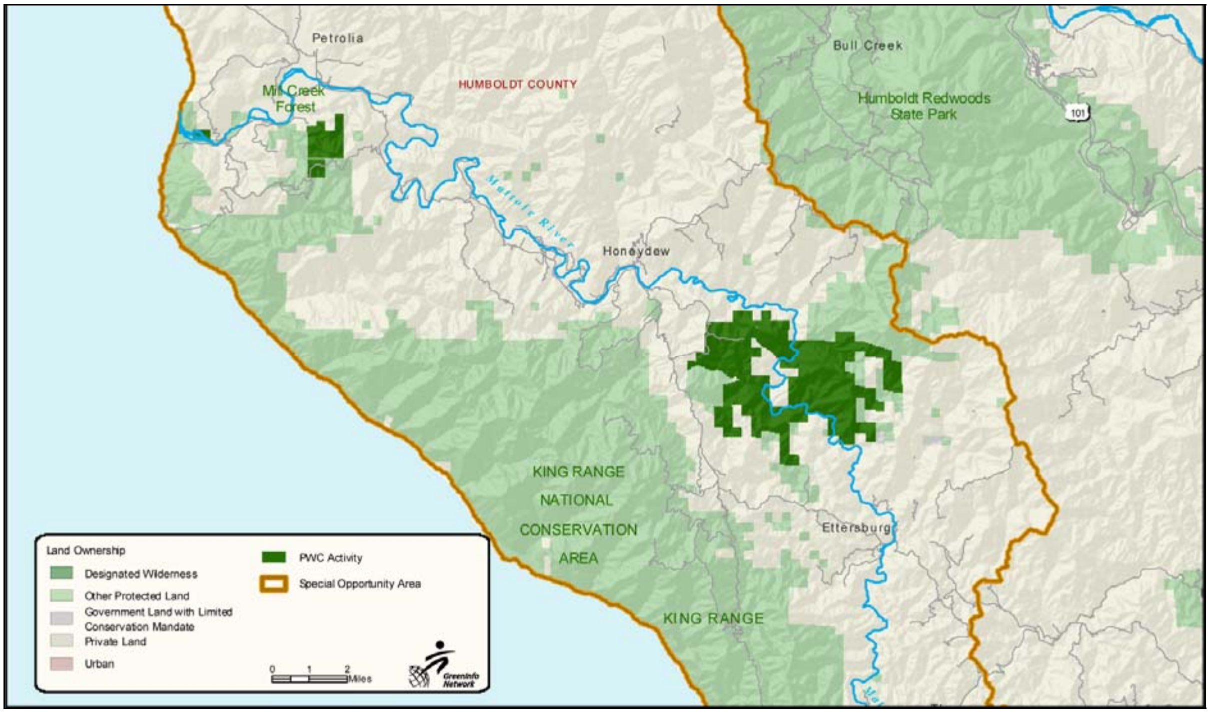



***Figure 5.15: PWC projects helping to build the Redwoods to the Sea corridor***

While PWC's interests in the acquisitions were to protect key watersheds relevant to Coho and steelhead recovery, the acquisitions met SRL's core objectives of protecting old growth redwood forests. As one respondent noted, strengthening this protected corridor is "critical to the future of the redwood systems." The acquisitions buffer old-growth redwoods, preserve Douglas-fir stands, and protect water quality and salmon and steelhead habitat in Mill Creek and Mattole River. Land acquired within this corridor faced the threat of logging and development. A total of 7,280 acres were acquired in the Mattole River watershed of which 850 acres were outside the corridor.

- **Missing Linkages Acquisitions.** PWC funding made significant contributions to three of the "missing linkages" identified in the South Coast Missing Linkages Project, a comprehensive plan for a regional network that would maintain and restore critical landscape-scale habitat linkages between existing protected areas in southern California [described in Section 9].

  The *Tehachapi Connection* is the largest landscape-level connection, close to 600,000 acres, linking the southern Sequoias and Sierra Nevada down to Los Padres National Forest. With the PWC-supported protection of Tejon Ranch [Section 9] and acquisition of the nearby 9,576-acre Parker Ranch, one respondent notes, "the backbone of the connection is done." Additional acquisitions to the northeast in the Kern River Watershed [described above] and to the southwest in the Carrizo Plains further expand PWC's contributions to linking together the five bioregions of this area.

- The *Santa Ana – Palomar Connection* is a landscape linkage between the Palomar Mountains, Anza-Borrego Desert State Park, and the Santa Rosa Mountains. In addition to the protection of the Beauty Mountain Area, discussed above, a key PWC-funded acquisition to support this linkage is the Temecula Towers Property. Although only 78 acres, this parcel expands the Santa Margarita Ecological Reserve and provides a proposed vegetated land bridge overpass across Interstate 15 to facilitate wildlife movement and avert the ecological isolation of the Santa Ana Core Area.

  PWC also made numerous acquisitions to solidify protection of the *San Bernardino–Little San Bernardino Connection* and the *San Bernardino–San Jacinto Connection*. The Friends of the Desert Mountains, for example, made several acquisitions in the Stubbe Canyon Corridor (12 parcels; 791 acres) and the Whitewater Corridor (over 500 acres, including the critical Whitewater Farm property which also supports Wild and Scenic River eligibility, discussed above). These acquisitions are within key wildlife corridors between the San Gorgonio Wilderness in the San Bernardino Mountains (the transverse ranges to the north) and Santa Rosa and San Jacinto Mountains National Monument (the peninsular ranges to the south). Friends of the Desert Mountains also acquired over 1,300 acres in Big Morongo Canyon, thereby protecting a key wildlife movement corridor between Joshua Tree National Park to the east and the San Gorgonio Wilderness and San Bernardino National Forest to the west.

- **International Linkage.** PWC also contributed to the formation of wildlife linkages across international boundaries with four acquisitions: the Jacumba acquisition, completed by the Anza-Borrego Foundation; the Hauser and McAlmond Canyon acquisitions completed by the Back Country Land Trust, and the Pamali acquisition, completed by the Conservation Fund. Located within the Otay to Anza Borrego Borderlands, a PWC special opportunity area, these 2,890 acres of acquisitions contribute to establishment of a viable conservation corridor between the United States and Mexico. Acquisition of these properties was a high priority for the Las Californias Binational Conservation Initiative -- a collaborative project of The Nature Conservancy, Pronatura and the Conservation Biology Institute.

## *Mitigating Threats; Protecting Key Species and Ecosystems*

*5.5 PWC acquisitions help mitigate a number of key threats to wildlands, and contribute to the protection of a broad set of key species and ecosystems throughout California, most notably salmon habitat in the North Coast.*

Acquiring wildlands for protection of biological diversity and ecosystem processes is partly a matter of assembling land that is protected from incompatible human uses and partly a matter of addressing specific threats to key species. To further understand the conservation value of the acquisitions, we reviewed grant documents to identify the key threats that were mentioned as justification for grants, as well as the rare and endangered species that would be benefitted by the acquisitions. This section presents that information, recognizing that it is only a sample of what is actually present on the landscape because the information was not assembled during grantmaking in a consistent or thorough way. This is not a criticism of the grantmaking process, however, because program staff did not take a purely species- or threat-based approach to project selection. Instead, projects tended to be connected to broader landscape-level strategies, as influenced by the opportunities that presented themselves. As a result, the data that we have about the threats that will be mitigated and species protected by acquisitions likely underestimates the real impact of the acquisitions.

### Mitigating Development Pressures and a Variety of Other Threats

Proposals for PWC grants identified the major threats to habitat quality, ecological integrity or wildness that land acquisition would help mitigate. Table 5.3 contains a list of these threats, in order from most to least common across acquisitions.

***Table 5.3: Threats identified in acquisitions grant documents (in order of prevalence)***

| |
|---|
| Development (primarily residential, vacation homes and resorts) |
| Habitat degradation and fragmentation |
| Forest management conflicts |
| Mining |
| Recreational impacts, generally from off-road vehicles |
| Road construction |
| Water diversions; Dams |
| Water pollution |
| Grazing |
| Invasive species |
| Agricultural development |
| Water rights conflicts |

Not surprisingly, the overriding threat mentioned in more grant documents than any other was development, including residential and commercial construction and the subdivision of land into home sites. Indeed, subdivisions – both suburban and rural -- are the new "checker boarding" of the landscape with the potential for significant impact due to habitat fragmentation. Several respondents talked about the threat of speculators buying up large blocks of land and subdividing it. For example, one talked about the 12,000 acre Napa Ranch property, a large acquisition in an area of extremely high real estate values. "What you want to do is avoid having someone with too much money buy that 12,000 acres and they take the parcels and sell them off individually… The threat is if you get too many of those places and it's broken down into too fine of chunks that you'll lose the coherence of the region."

Others saw the threat of development as particularly high in the areas where timber companies are shifting from timber products to real estate development. As one respondent noted, "This whole Mendocino coast is important. It could be major disaster down the line because these companies are going out of the logging business. And a lot of the lands they acquired -- maybe a million acres of land they bought from the old homesteaders – it's all lotted out in 160 acres, 40 acre, 80 acre lots. So they could go ahead and starting selling tomorrow, and vineyards and houses would pop up and create erosion problems."

In the Desert areas, off-road vehicle use for recreation and other purposes was seen as a particular threat. According to one respondent, "off-road vehicle use is the number one problem. It's insidious because once it starts, dumping, campsites, shooting, fires, a whole chain of degradation begins. And once a road is established, the ORV community will often argue for right of way." Another respondent agreed with this perspective, "I see off-road vehicle use as a major detriment to public lands. And the more that we can get wilderness designation or protected designation, the better, and the quicker and the faster. There seems to be a method of operation whereby if the land isn't posted, it's fair game for off-roaders, and then what happens is well, as long as it's trashed anyway, you might as well put it into an off-road vehicle park. We're seeing that as a real tragedy. We're working on a particular piece of property to try and save it from that."

- **Cathton property.** A good example of a land acquisition mitigating the impact of a threat is the Cathton property, an 8,881 acre parcel acquired by Friends of the Desert Mountains with help from a PWC loan. The property is a vital wildlife linkage between the Coachella Valley Fringe-toed Lizard Preserve and Joshua Tree National Park. It is an essential sand source and transport area for the sand dune system on the Preserve, and part of the hydrological regime for the Preserve's many palm oases. The property had been threatened with development, as it was optioned to a prominent developer who intended to build a major new residential community on the property. The proposed development would have included 7,000 homes, three hotels, two country clubs, 12 golf courses, a university, an R&D center and numerous retail shops and restaurants, and would have had serious adverse effects on both the Preserve and JTNP. Since the property is managed and protected under the Fringe-toed Lizard Habitat Conservation Plan and is one of the areas proposed for conservation in the Coachella Valley Multiple Species Habitat Conservation Plan, development would have made it impossible to implement the plan.

## Species and Ecological Communities Affected by PWC Projects

California is a place rich with rare and endemic species, and several PWC acquisition projects highlighted the value of the grant to protection of rare species. For example, the Cyrus Canyon acquisition in the Kern River Watershed included the only known population of the Kelso Creek Monkey flower. However, except for salmon in the North Coast watersheds, PWC's acquisitions strategy was not species-focused. Instead they emphasized connectivity and assemblages of lands. As one staff respondent noted, "The rare and endangered species just came with the land. Each one has some rare and endangered species in it. But that wasn't necessarily the overriding concern. That was just one more biodiversity value to add to the justification. … We did not rank species."

While not an overriding focus of the program, in fact, many sensitive species are associated with the kinds of landscapes in which PWC invested. As we discussed above, habitat fragments and key linkages – areas of overlap between several ecosystem types -- are the places where one would expect higher levels of species diversity. In fact, the program protected 51 habitat types (Table 5.4), 47 sensitive animal species (Table 5.5), and 36 sensitive plant species (Table 5.6). It is difficult to assess how much protection they received, and hence how much the PWC acquisitions contribute to species level diversity. But for most species, protecting habitat within a larger framework of protection is exactly the kind of strategy that is likely to be productive, except for the most endemic species.

***Table 5.4: Range of habitats protected in PWC acquired land***

*North Coast*
- Baker Cypress trees
- Douglas fir
- Dry Mesic Chaparral
- Estuary/wetlands
- Oak woodland
- Old growth redwoods
- Pine Oak Woodland
- Riparian corridors
- Savannah

*Modoc*
- Annual grasslands
- Blue oak savannah
- Foothill woodland
- Mixed chaparral
- Mixed riparian woodland and scrub
- Oak woodland

*Sierra Nevada*
- Annual grasslands
- Blue oak woodland
- Deep conifer forest
- Foothill riparian systems
- Gray pine forests
- Montane hardwood
- Old growth Douglas fir
- Riparian habitat
- Sagebrush steppe
- Sycamore stands*
- Western gabbroic mixed juniper woodlands*
- Wet meadow

*Central Valley*
- Oak woodlands
- Riparian habitat

*South Coast*
- California chaparral
- Chamise chaparral
- Coastal sage scrub
- Cottonwood-willow riparian forest*
- Coulter pine forests
- Desert scrub
- Diegan sage scrub
- Englemann oak groves*
- Live oak riparian
- Oak woodland
- Scrub oak chaparral

*Desert*
- Blue Palo Verde-ironwood-smoke tree woodlands
- Creosote bush scrub
- Desert freshwater marsh
- Foothill oak woodlands
- Interior wetlands
- Mesquite dune
- Mesquite woodland
- Native grasslands
- Oak savannas
- Southern coniferous forest
- Willow riparian forest

* Rare or threatened in California

***Table 5.5: Rare, threatened or endangered animal species protected by PWC acquisitions***

| | | |
|---|---|---|
| *Desert* | *Sierra Nevada* | *North Coast* |
| • Barefoot banded gecko<br>• Desert pupfish<br>• Desert tortoise<br>• Flat tailed horned lizard<br>• Least Bell’s vireo<br>• Mountain lion<br>• Peninsular bighorn sheep<br>• Mexican spotted owl<br>• Southwestern arroyo toad<br>• Southwestern willow flycatcher | • California red-legged frog<br>• Coast horned lizard<br>• Goshawk<br>• Great grey owl<br>• Lahontan cutthroat trout<br>• Peregrine falcon<br>• Sierra Nevada red fox<br>• Southwestern willow flycatchers<br>• California spotted owl<br>• Tehachapi slender salamander<br>• Wolverine | • Peregrine falcon<br>• Tule elk<br>• Wolverine<br>• Coho salmon<br>• Chinook salmon<br>• Steelhead trout<br>• Northern spotted owl<br>• Bear<br>• Del Norte salamander<br>• Coastal tailed frog<br>• Southern torrent salamander<br>• Marbled murrelet<br>• Golden eagle<br>• California spotted owl |
| *South Coast* | *Central Valley* | *Modoc* |
| • Arroyo toad<br>• California gnatcatcher<br>• Coast horned lizard<br>• Mountain lion<br>• Northern red-diamond rattlesnake<br>• Quino checkerspot butterfly<br>• Stephen's kangaroo rat<br>• Western pond turtle | • Bald eagle<br>• Blunt nose leopard lizard<br>• San Joaquin kit fox<br>• Swainson’s hawk<br>• Tipton kangaroo rat<br>• Yellow-billed cuckoo | • Bald eagle |

***Table 5.6: Rare, threatened, or endangered plant species protected by PWC acquisitions***

| | | |
|---|---|---|
| *Desert* | *North Coast* | *Sierra Nevada* |
| • California hulsea/San Diego sunflower<br>• Cuyamaca Lake downingia<br>• Cuyamaca larkspur<br>• Cuyamaca rockcress<br>• Elephant trees<br>• Mecca aster<br>• Parish’s slender meadowfoam<br>• Peirson’s milk-vetch<br>• San Diego milk-vetch<br>• San Diego gum plant<br>• Triple-ribbed milk-vetch | • Howell’s Montia<br>• Maple-leaved checkerbloom<br>• Mendocino coast Indian paintbrush<br>• Napa Lomatium<br>• Narrow-anthered California Brodiaea<br>• Nodding harmonia<br>• Redwood Lily | • Bakersfield cactus<br>• Bisbee Peak rush-rose<br>• Congdon’s Lewisia<br>• Congdon’s woolly sunflower<br>• El Dorado bedstraw<br>• El Dorado mule-ear<br>• Kelso Valley monkey flower<br>• Layne’s butterweed<br>• Pine Hill Ceanothus<br>• Piute Mountains navarretia<br>• Red Hills soaproot<br>• Stebbin’s morning glory<br>• Yosemite Onion |
| *South Coast* | *Modoc* | |
| • Long-spined spineflower<br>• Mojave tarplant | • Adobe lily<br>• Ahart’s paronychia<br>• Butte County meadowfoam | |

## Salmon in the North Coast

Salmon was one of the few focal species highlighted in the PWC Strategy Book. One of PWC's primary goals in the North Coast watersheds was to enhance recovery of salmon and steelhead while identifying opportunities for conserving and restoring timberlands, to avoid the dual threats of development or expanded timber operations. Almost 20,000 acres were acquired in the salmon areas of the North Coast, primarily in three watersheds, the first a PWC Priority Area and the others Special Opportunity Areas. In some cases, acquisition activities were combined with PWC-funded restoration of salmon habitat.

- **Smith River Watershed.** The Smith River is a critical refuge for salmon and steelhead, and the area is recognized by the United Nations as a World Heritage Site and Biosphere Reserve. Major acquisition and restoration work undertaken by PWC grantees include acquiring the 9,500 acre Goose Creek property [discussed above] and restoring more than 25,000 acres within the Mill Creek watershed. The Mill Creek property was acquired in 2002 through RLFF support prior to the PWC program, but after more than 50 years of industrial timber management, the land needed restoration. Restoration of Mill Creek is a large ongoing project of the Save the Redwoods League totaling around $9 million over last six years, with PWC as the largest single contributor.

  PWC also supported restoration work in the Smith River watershed by the Smith River Alliance. From a single PWC restoration grant of $220,000, the Alliance has been able to leverage over $667,000 for restoration projects in the watershed. One notable project was the removal of a culvert in Cedar Creek, just upstream from the Mill Creek property. The culvert blocked multiple life stages of salmon from spawning and rearing in high quality stream habitat that coho had historically used.

- **Redwood Creek Watershed.** Redwood Creek flows through the heart of Redwood National Park, a United Nations World Heritage Site. Managers of Redwood National Park identified Lacks Creek as the primary source of sediment that is degrading salmon habitat in Redwood Creek. With PWC support, Save-the-Redwoods League acquired 2,491 acres of forestland in the Lacks Creek watershed and added it to the Lacks Creek Late Successional Reserve, managed by the BLM. Additionally, RLFF funding gave the League leverage to negotiate with two more property owners and acquire 2,000 additional acres. All 4,491 acres were added to the Reserve, making it a sufficient size to allow its inclusion in the National Wilderness Preservation System. The Lacks Creek acquisition preserves old-growth Douglas fir forests and protects Coho, Chinook, steelhead and cutthroat. A donation agreement with BLM will ensure that the lands are managed solely for conservation purposes. Following acquisition, a PWC grant was made to the Pacific Coast Fish, Wildlife and Wetlands Restoration Association to remove old logging roads to control erosion and decrease the Creek's sediment load.

- **Mattole River Watershed.** The Mattole River contains the state's only genetically wild population of fall-run Chinook salmon, but the watershed has been severely impacted by past land management – the Mattole River is listed for sediment pollution on the EPA list of impaired water bodies. PWC funds supported both the acquisition and restoration of land in this watershed. Save-the-Redwoods League acquired more than 1,700 acres within the Mattole River Watershed and transferred the land to the BLM and California State Parks, protecting about one-fourth of the Mill Creek watershed. As discussed above, many of these acquisitions also contributed to the creation of a protected "Redwoods to the Sea Corridor." One property in particular, the Reed property, increased protection of Mill Creek's Coho population, the last remaining run in the lower Mattole. This 593-acre property provides a key link in the comprehensive protection of the Mill Creek watershed in southern Humboldt County. Transfer to the BLM automatically incorporates it into the Mill Creek Area of Critical Environmental Concern/Research Natural Area, ensuring protection of the cold water salmonid fishery.

  Using PWC funds, the Mattole Restoration Council stabilized thousands of cubic yards of sediment that would otherwise be in immediate risk of delivery to the salmonid-bearing watercourses. The work funded by PWC included Mill Creek watershed reforestation, grassland restoration, and landslide treatments and Mattole estuary restoration such as cottonwood planting and invasive species removal. PWC funding also allowed the Mattole Restoration Council to develop a monitoring and adaptive management regime for ongoing restoration projects, and to conduct a systematic assessment of a major portion – 25,000 acres – of the watershed. Through the assessment, they identified 200 priority sites for sediment control and began work on these sites.

### *Ensuring Long Term Wildlands Protection*

*5.6 PWC took unique measures to ensure the long-term value and permanent protection of acquired lands, most of which will ultimately be under public ownership.*

Just because land is purchased does not mean that it is protected. Protection is a function of the resulting landownership, what the landowners can do with the land, and how they monitor and steward it. Even land that is owned by the government might not be protected as future demands are placed on those agencies or they do not manage their lands well. We compiled data on all PWC land acquisition parcels that had information about the specifics of their ownership and protection status after acquisition. In a majority of the purchases, land is being placed into a particular class of protected lands, though a significant fraction is not. For many of these, specific restrictive language accompanying the donations is helping to assure future protection. Indeed, RLFF was particularly effective at getting that kind of language included in land conveyed into federal ownership. Nevertheless, the ultimate test of the long term protection status of a piece of land will emerge over time and we will only know if the lands are monitored. Some will need restoration to be fully functional in ecological terms.

## Type of Purchases and Resulting Ownership

Almost all of the land was acquired through fee simple purchase, but some acquisitions also involved easements, land exchange, and purchase and donation of grazing allotments. All but eleven of the over 570 parcels acquired were fee simple purchases. Ten acquisitions were conservation easements (a total of about 22,000 acres), five of which were in the Sierra Nevada and made up about half of the acreage acquired through easements.

One land exchange was supported among the parcels acquired by the Save the Redwoods League to build the "Redwoods to the Sea" corridor. SRL found PWC a willing and flexible funder to assist in completion of the land exchange, which involved purchasing lands outside the corridor and trading them for higher value, ecologically significant lands within the corridor. According to one grantee, RLFF was "Very good to work with on some of the land trades when we were trading for land of higher conservation value. … They went so far as to give us an additional grant to cover some of the difference in the value between the land we were giving and getting."

The National Audubon Society secured two grazing allotments totaling 30,000 acres with the purchase of Alexander Ranch in Weldon. The Ranch is located on the South Fork Kern River adjacent to the Audubon Kern River Preserve and is one of California's finest remaining examples of Great Valley cottonwood riparian forest. A non-use agreement is governing BLM management of the allotments until the time when BLM plans are updated to incorporate permanent protection.

Most of the acquired land was or will ultimately be managed by a public agency (Figure 5.16). Over half of the land was or will be transferred to federal ownership (62%), and about a fifth each will be managed by state agencies (18%) and NGOs (20%). The largest federal owner of acquired lands is the BLM. The Nature Conservancy and the Shasta Land Trust are the NGOs with largest ownership, each having acquired a large conservation easement.

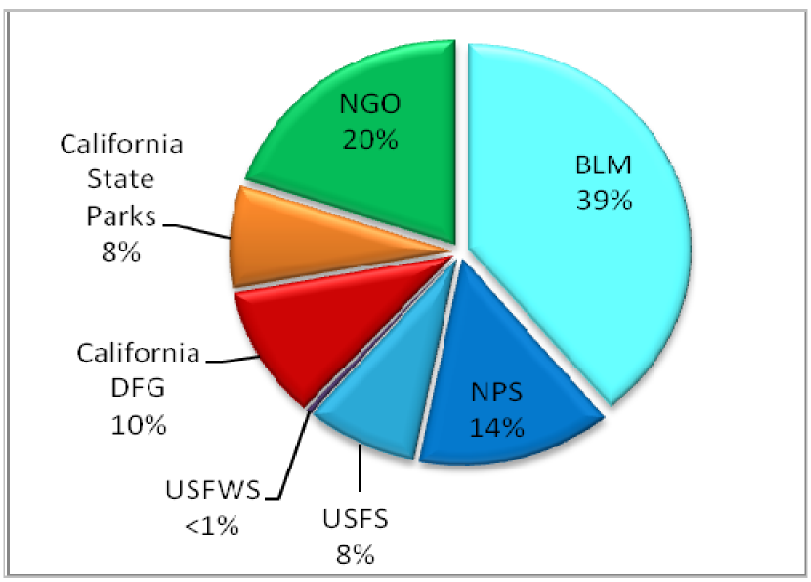



***Figure 5.16: Final ownership of acquired acreage***

As Figure 5.17 outlines, the lands will be managed under a variety of classifications, the majority of which can be considered protected area types, such as wilderness or reserves. While approximately 60% of the acreage is in a designated protected area, the largest proportion of the land, about 27%, will be managed as BLM lands without a specific protection designation. [We viewed BLM lands, CDFG land and wildlife areas, and national forest acreage as the least protected by virtue of their designation.] The second largest status of acquired land – 16% of the acreage – is in NGO conservation easements, followed by 14% in National Parks. Only about 8%, or 10,000 acres of the acquired land will be managed as wilderness (about 80% of that by the BLM), and an additional 4% or 5,830 acres are Wilderness Study Areas.

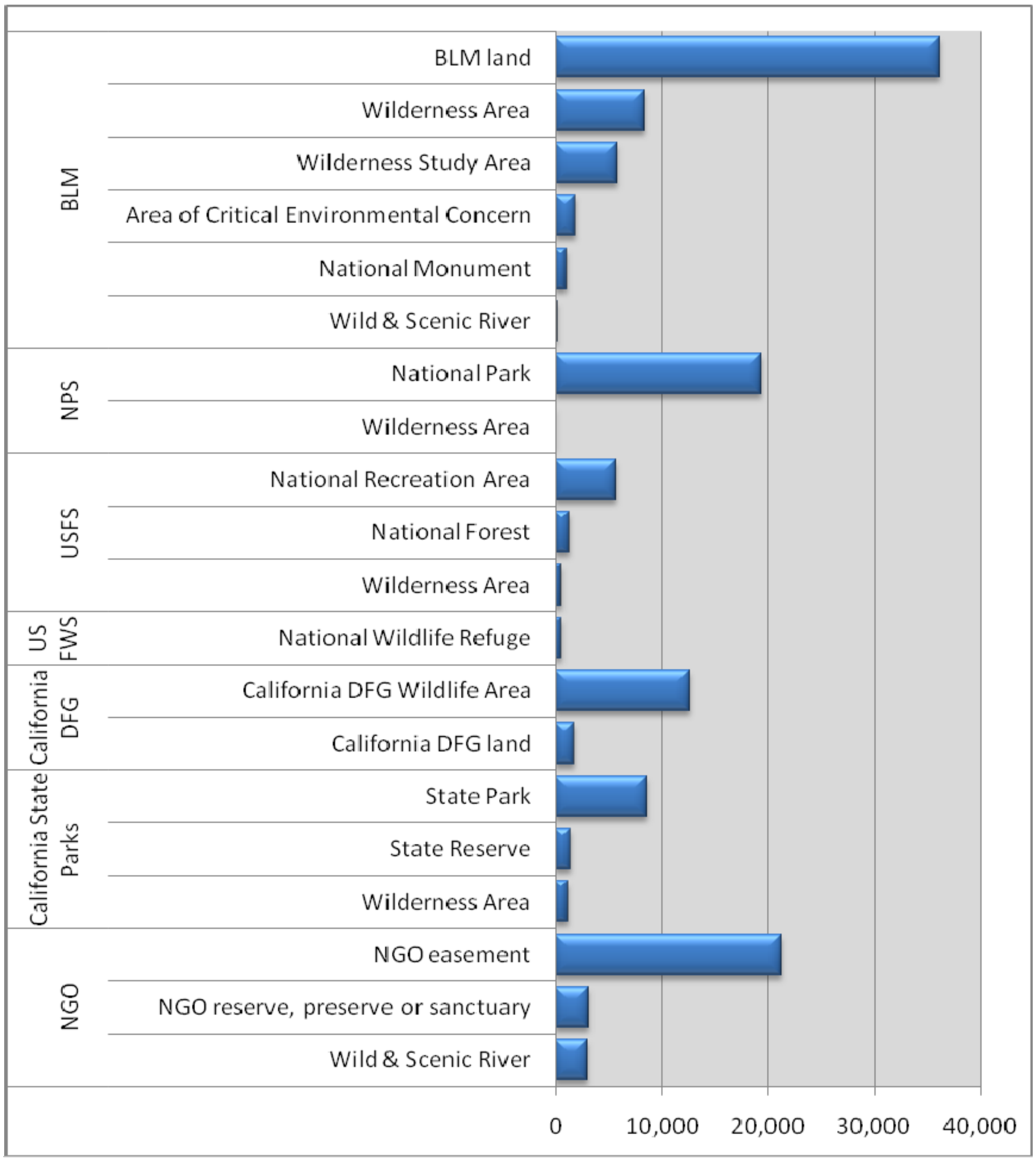



***Figure 5.17: Eventual protection level (ownership and designation) of acquired acreage***

**Agreements and Restrictions to Ensure Long Term Protection**

We would be more concerned about the designation status of 40 percent of the acquired land if many of the donations to the agencies had not included specific restrictions on use. Clearly agencies are subject to changing management priorities, political pressures, and funding issues, and without legal restrictions, future use may not be in line with PWC priorities. As one PWC staff member commented, “under PWC we’ve really been looking at the highest level of protection on the properties we acquire. … People say, ‘well don’t you trust the Park Service,’ I say ‘no.’ I might go out to see 40 acres that we acquired and it’s got a parking lot or a hot dog stand on it like they did in Glacier Point.”

Recognizing the need to ensure protection, a number of the parcels of land conveyed to federal agencies by grantees were transferred with specific donation restrictions, but this was not an easy thing to do. Agencies rarely accept deed restrictions on donated lands. Part of this is cultural. Said one respondent, “The old time guys in the agencies say, ‘No one tells us what to do with the lands we acquire’.”

Much of the reluctance to accept restrictions is bureaucratic. Several respondents felt that the core of the problem was the need for the U.S. Department of Justice to waive some of its standard procedures to accept restrictions. According to one, “We’ve had to go back to DOJ and ask for some waivers of their standards and we’ve created some blanket waivers and waivers on individual cases. And we’ve created an understanding of what is routinely acceptable to us, what will require a specific waiver, what we can process under our blanket waiver. That was an incredibly time consuming and difficult process in terms of bringing DOJ through the loop on that.” Others felt that DOJ was responsive, but the agencies – in particular, the USDA-Forest Service – were resistant to any deed restrictions.

Regardless, RLFF was extremely successful at negotiating for these restrictions. “Nobody else that I know has gotten the BLM with approval of the DOJ to allow us to put deed restrictions on the properties we transferred. Same with the Park Service. …So everything we’ve acquired has got deed restriction on it. Essentially no construction of roads or structures except those that are critical for health and safety, no off road vehicle use, no timber harvesting except that is necessary for insects and reducing fire hazard, and to protect water resources.” RLFF and its grantees were also strategic in the way they split ownership rights to ensure that agency managers are not tempted by subsurface values. According to one respondent, “The way we handle minerals, particularly on BLM lands,…we split the mineral estate. We have the NGO or nonprofit keep the minerals and just transfer the surface to BLM. It’s fairly simple, but it does put a higher level of protection.”

Statewide observers viewed RLFF’s ability to get these restrictions as a significant victory for the program. According to one, “Their deed restriction requirements for lands that are being gifted to public agencies which are not in wilderness, that was a really important move, showing that they truly do care about their investment. …Not just with BLM but with the Park Service too, and it was a major event getting the Park Service to approve it… When we’re all done in the Mojave and Joshua Tree National Park, we’ll have close to 300 properties affected by that.”

In many cases, the donation restrictions require not just passive protection but ongoing monitoring and stewardship, and many interviewees noted that if land is going to maintain its conservation value in the long term, it needs to have a plan in its place for its long-term stewardship. According to one, “It used to be 10 years ago that everyone focused on acquisition. You acquired a piece of property and everybody was happy. Now, I think, emphatically, especially if it’s going to transfer to a state or federal agency, you have to not only ensure that the real estate is acquired, but that there’s a stewardship plan and some provision in the future for the property being managed and stewarded wisely. I don’t know that we have very many good answers, but I can tell you that when you transfer property to the state or federal government here, you have to be very concerned that there might not be the appropriate level of management funding for it. Reason being is that in California, there’s a lot of money in bond acts to acquire property, and no money on the management side to manage the property or get any active stewardship underway.”

One way PWC dealt with this need for long-term stewardship was to include language in the deed restrictions that requires monitoring, often by the land trusts who participated in the acquisition. One respondent described how this changes traditional practice. “In the past, the nonprofit would buy it and then give or sell it to the public agency and walk off. Now these nonprofits are responsible for monitoring these properties forever. The deed restriction actually has a monitoring requirement. Most of these grant recipients have had to develop stewardship programs for these deed restrictions – this is huge. They have the same responsibilities as a conservation easement when it comes to having a long term perspective. They require monitoring on a regular basis and long-term record-keeping, and the responsibility can be re-assigned if the land trust fails. It’s going to be RLFF’s responsibility to check with the land trust ten years from now to see if they are monitoring.” Recognizing the cost of this activity, a number of the final PWC capacity-building grants included stewardship support for PWC-funded acquisitions. At least one was in the form of a small endowment for long-term monitoring.

Several respondents saw this as a huge innovation for future protection. “I’m not really anticipating the government is going to violate the agreements, but we do know they are overloaded in many cases and will not manage their lands carefully enough, or may allow land uses to degrade these properties. That’s the strength of these donation agreements because what you are doing is creating a long-term relationship between the nonprofit and these agencies…forever.” Says another, “What this does is that it creates a need for a bunch of people out there looking and paying attention to these places, which has never been done before when it comes to land acquisition.”

## *The Critical Roles Played by PWC Funding, RLFF and its Consultants*

*5.7 Overall, PWC played a critical role in these land acquisitions, as a source of funding, but also in stimulating additional funders, and providing key expertise and contacts.*

While the magnitude of the PWC funding certainly was important to the program's ability to have impact, how the funds were deployed was also important to the program's success. RLFF enabled and motivated acquisition projects by: providing access to funding faster than is the case with most sources of government funding; providing leverage for high cost acquisitions through core, catalytic funding; and by recruiting grantees into working on projects that matched PWC priorities. The expertise of program staff and consultants was extremely helpful to the grantees and helped facilitate the ultimate purchase of the lands.

### The Ability to Act, and Act Fast

Several grantees and other observers reported that PWC funding was absolutely critical to the completion of certain land acquisitions, even when the full cost of a project was not covered by PWC funds, or RLFF only provided loans. Agency partners commented that getting funds from their agencies or the appropriations process took a long time, yet properties come on the market and require expedited action. RLFF "had the ability to act fast in ways that our agency could not," said one agency respondent. For example, funding for the Bandettini property [described above] came in the form of a PWC loan to the Land Trust of Napa County, which allowed them to acquire the property as soon as it was available. Otherwise they would have had to wait for funds from California State Parks to become available, and risk losing the acquisition to private development. The loan was repaid in full.

In other cases, PWC provided bridge funding to help a land trust get through a cash flow problem. When state grant funding ran out for one grantee, PWC filled in until other revenue sources came on line. As one respondent noted, "I really don't even know what could have happened without PWC funding… It really tied us over. We could have been closed down."

In another example, PWC funding was used to provide a no-interest loan to the Lake County Land Trust Organization to cover debt service while they were waiting for state funding of their purchase of the Black Forest on the side of Mount Konocti adjacent to Clear Lake. LCLTO had acquired the property when it was faced with the previous owner's plans to log this scenic area. Then, when arranging a BLM land exchange and state Wildlife Conservation Board funding to reimburse the cost of the acquisition, the Land Trust ran into trouble because of "bureaucratic red tape." According to their final grant report, "The no interest refundable grant from the Resource Legacy Fund Foundation was the knight on a white horse that saved the Black Forest in its springtime of discontent. But for RLFF's grant, the debt service on the two loans would have caused the project to fail through foreclosure, or the Land Trust would have been forced to sell a portion of the Forest for possible home site development to raise funds to stave off foreclosure."

According to the report, "The successful conclusion was entirely in doubt until the Resources Legacy Foundation Fund loan was secured. From that point anxiety turned to optimism and ultimately success. This result, the permanent protection of a 199-acre stand of old growth

Douglas fir which provides one of Lake County's most inspiring views and habitat for a diverse assortment of birds, was simply not possible without the assistance of the Resources Legacy Fund Foundation."

## Getting Leverage

While PWC funding was the sole support for a small number of acquisitions, for two-thirds of the grants, PWC only provided partial support. On average, grantees raised $2.1 million beyond PWC funds to complete a grant's proposed acquisitions, effectively yielding a 2:1 match of the PWC dollars. Some went well beyond this level of match. For example, to acquire the 12,000 acre Napa Ranch property, "Preserving Wild California put in $1 million, the agencies put in $11 million [in state bond money], so you're getting like a 10:1 leverage for your money and for your expenditures," said one respondent. In expanding the Montgomery Woods State Preserve in Mendocino County, Save-the-Redwoods-League leveraged $1 million in PWC funds to secure matching funds of $5.5 million. For the almost 9,000-acre Cathton acquisition [described above], the Friends of the Desert Mountains partnered with five entities, including The Nature Conservancy, the Coachella Valley Mountains Conservancy and the Wildlife Conservation Board, to leverage an additional $24.5 million beyond the $1.5 million grant from PWC.

Leverage came in several forms: First, many federal and state programs had matching requirements and PWC helped meet the match. As one respondent noted, "The public agency funders are always looking for leverage, as everyone is. So the fact that RLFF is going to invest in one of these places had them sit up and take notice. So we were able to secure another half million dollars from the California Coastal Conservancy, 1.5 million dollars from State Parks, 1.25 million from the Wildlife Conservation Board, alongside with the funding that came from PWC, which enabled that all to come together."

In addition, the opportunity presented by the PWC grants helped catalyze activity where it would not have otherwise happened, in part by influencing priorities, and/or by providing a degree of legitimacy to the effort. "The real benefit here is that PWC money can be used in a partnership way to catalyze other funds. … There's a partnership going on between the agency, PWC, and the land trust to acquire these properties, where everyone is giving a little bit more than you could on your own." According to another, "The importance of the money that comes from outside the county like this PWC money is that it inspires and instigates the locals to contribute." And another, "it would show other groups that RLFF thought this was a good investment too…that someone else believed in this."

An additional respondent talked about the ability of RLFF to bring a variety of public and NGO players to the table and arrange complex land deals. "I'm struck at how they are able to put in their funds and affect how people align the state funds around them. Around what the priorities are that they jointly identify. All the projects we have done out there would have been very difficult without the level of funding and support that RLFF brought to the table and enabled us to build a funding package around them."

PWC's investments sometimes had an indirect effect on land protection by helping to catalyze other acquisitions that were adjacent to or built on the acquisitions completed with

PWC support. In one example, a grant to the Back Country Land Trust to complete one of a several-phase acquisition project adjacent to the Hauser proposed wilderness area stimulated The Nature Conservancy to raise matching funds and complete a subsequent phase of acquisition. The PWC funding also enabled local land trusts to do successful land deals which builds their credibility with banks, local government and potential members. As one grantee indicated, “We can say ‘look at all the acquisitions we’ve done successfully.’ … It builds our credibility, and helps us with loans. It shows that we’ve done it before.”

Because of these ripple effects of PWC investments on other funders, other acquisitions, and the strengthening of organizations to complete acquisitions, it is likely that PWC funding is responsible for the protection of a much larger amount of land than the simple estimate of grant-related acreage stated at the beginning of this assessment. Even with adequate reporting, it is difficult to estimate how many more acres have or will be acquired because of the indirect effects of PWC investments at leveraging additional dollars and catalyzing other protection action.

## Motivating and Facilitating Action

It seems clear that the style of RLFF in implementing the program was not to sit back and wait for proposals to come to them, but to seek out opportunities and motivate organizations to take advantage of them. A number of grantees indicated that RLFF sought them out to work on a specific acquisition. As one said, “We didn’t go out seeking it. [Two other PWC grantees] were looking at resources on that property and decided it was important as part of the corridor effort. So they came to us. RLFF got involved and said if you apply for a grant, we’ll help with this acquisition.” In another case, an organization was encouraged to reestablish a presence in an area which was a PWC priority area. “Ed Hastey came to us and said, we’d like you to go back in. So they were the ones who actually catalyzed our work there. Without them, it wouldn’t have been a priority.”

The RLFF program officers, along with consultants like Ed Hastey and Shelton Douthit, clearly motivated and facilitated action in priority areas. Through their extraordinary knowledge of the landscape and ways to close deals, and their personal credibility and energy, they encouraged grantees to take action and helped ensure that the organizations had access to the skills needed to complete the acquisitions. As one respondent noted, “I am so, so grateful that PWC happened and that Michael hired Ed to do what he did. He is such a great person to work with: demanding but extremely knowledgeable. He knows many of the property owners and will dissect appraisals better than anyone. He knows where the problems, issues and opportunities are. He helped direct the land trusts. … If I had the money, I would certainly be putting it to anything Ed wants to do.”

Another respondent described Ed Hastey’s vision and role: “He’s certainly got a very creative land acquisition map. He’s very supportive. He’s the kind of guy that will be patting you on the back saying ‘of course you can do this. Here’s what you have to do.’ And he’s also very thorough. He really knows his property by the time he gets there.” And according to another, “Ed was instrumental. In many cases, he’s the one who went to the local land trust and said, “Here’s a need, a great opportunity, can you do it?”

## *Dealing with Challenges*

*5.8 Grantees faced a variety of challenges in completing land acquisitions, including the sheer volume of effort involved in finding willing sellers and purchasing many small parcels in a program that valued wilderness inholdings. Donating lands to government agencies involved bureaucratic hurdles. Ultimately, relationships and partnerships were seen as critical to the success of many acquisition projects.*

These acquisitions were not without their challenges. Most were more costly, took more time and involved more effort than was anticipated in grantee proposals. Overestimating the acreage that could be acquired and underestimating the amount of time it would take was common. In fact, one of the difficulties in assembling accurate land acquisition numbers for the assessment came from final acquisition acreages being significantly different (and usually less) than those proposed, and many acquisition grants not being fully closed out because properties were still being pursued or negotiated. For example, Friends of the Desert Mountains proposed in January, 2003 to acquire 9,000 to 20,000 acres of wilderness inholdings in the Santa Rosa Mountains, Mecca Hills, and Orocopia Mountains wilderness areas. As of their December 2007 interim report, they had only acquired 1,621 acres. Similarly, The Wildlands Conservancy proposed in January, 2003 to acquire 10,000-30,000 acres of inholdings in the California Desert, but because of a limited number of willing sellers at the current market rate, acquired only about 1,000 acres and decided not to extend the grant beyond two years despite having remaining funds.

### Small Parcels and Willing Sellers

By focusing on the acquisition of small wilderness inholdings bought from many willing sellers in places like the California Desert, the normal problems associated with conservation land deals were exacerbated for PWC grantees. Each wilderness area may contain hundreds of parcels owned by hundreds of landowners. As one respondent noted, "In the Old Woman Wilderness Area [east of Twenty Nine Palms], there must be 400 landowners in there. It's a long tedious job to take them out of there." Each parcel involves a series of tasks, and a 5-acre parcel may be just as complicated as a 640-acre one.

Finding willing sellers and closing deals takes time. For example, one grantee received a grant in 2005 for a proposal to acquire 2,800 acres of wilderness inholdings. By the time of their 2007 interim report, they had contacted 341 property owners twice, received 35 responses, were in negotiation with 21 landowners, initiated 13 escrows, began transactions for nine parcels, and closed two deals, totaling 20 acres. Another grantee contacted 639 landowners four times, received 173 responses and 38 accepted offers.

Some grantees and consultants found ways to streamline this process. According to one grantee, "We were always thinking of ways to get sellers. Before, we would send the letter saying, 'are you interested in selling?' Now we send the letter with the purchase and sales agreement, so they see we're serious. They've got it right in their hands, they can sign it, and send it right back. So you come up with different ideas to make it work. Some of them do just send it right back, immediately."

From another, “In contacting sellers in the area, we have begun sending letters return receipt requested, which makes the recipient take more notice of the delivery while assuring us of their delivery. We also include Purchase and Sale agreements with the solicitation letters to make the process practically effortless for the seller. … Due to these tactics, we have had a very good response from landowners in the area.” Another grantee, a representative from a national organization, found that having local land trusts do the contact work was more effective than their own outreach.

It seems clear that finding willing sellers is a constant challenge, and has as much to do with the psychology and generational status of a potential seller as anything else. As one respondent noted, “These lands are owned by people and people have opinions about whether they want to sell it or not. Oftentimes one targets a particular area and says we want to acquire all the lands here. And you go and talk to the landowner, and the landowner says, ‘well, I don’t want to sell it.’”

Several respondents felt that opportunities may appear only once a generation. According to one, “What we’ve found was that you get one opportunity each generation to buy a property. A lot of these properties come on the market when there are generational changes and if you don’t pick them up then, they’re gone for another generation, or they’re converted and developed and they’re gone forever. So even though there might be unlimited funds available, if you throw unlimited funds into the market, it’s not really going to accelerate the buying and selling of these lands. Or you end up throwing so much money at it that you distort the market and start paying more than anyone really ought to. So we found that we had to develop a pace. … We’ve learned that particularly in the Desert where there are about a thousand properties to acquire, it will take generations to finish that work. Throwing more money at it isn’t going to accelerate it, regardless of whether that’s a good idea or not… because people make these decisions on their own time, when it’s right for them.”

“I’ll confess that we naively did a calculation at one point and said there’s 400,000 acres designated wilderness areas, the average parcel size is such and such, if we build the capacity to undertake these transactions, we can clear them out in 10 years. And that’s true if in fact you’re harvesting wheat or cutting the grass or something like that, but the weed or the grass in this analogy has a mind of its own and may or may not be interested in selling it to you.”

The Desert may be a particularly challenging place to acquire inholdings for cultural reasons. According to one grantee, there are very few key parcels to acquire in his area of the Desert and “the people who own them are people whose families have held them for a very long time… or they are unusual and weird people who don’t want to part with the property … If it’s not one thing, it’s another. There are either title problems or very unusual owners that have demands that switch from, ‘yeah, I’ll sell it’ to ‘No, I won’t sell it’ next week. It’s really pretty difficult getting these deals done. In other settings it seems to go faster.”

The anti-government feelings of people in rural areas also make these kinds of transactions difficult. As one grantee said, “We have to promise that we’re not going to take their property and give it to the federal government. A lot of the people that own property out here hate the federal government and the BLM. So we’re caught between a rock and a hard place when PWC wants you to turn it over to the BLM, and the owners don’t want that to happen.”

## Unrealistic Expectations about Land Values

Perceptions about land values are also problematic, and many landowners refused to sell because they felt that the offers were too low. Sometimes an updated appraisal led to higher offers, which led to much higher acceptance rates. Other times, people had unrealistic expectations. As one grantee told us, “Development near Las Vegas has put dollar signs in everyone’s minds. They think their property is worth more than it is, so it is hard to make a deal.” Another grantee commented, “A lot of the owners didn’t live here. They bought or inherited sight unseen, and then they hear about the growth here. And they start thinking ‘my land’s worth a fortune’ and they don’t realize there isn’t a road out there, or it’s going to take more than they thought to develop it, or it’s not worth as much as they think it is.”

Besides getting updated appraisals if the land values warranted them, having the PWC cash to make offers helped to move deals along. As one respondent commented, “having the money available from RLFF made us able to make offers. Not ask them if they’re interested and then go look for funding, and then go back and say now we have the money, because by then they may not be interested anymore. We were able to get it going right away.”

## Transferring Land to Government Ownership

Most of the land acquisitions were targeted for transfer to federal or state agencies, and the transactions were complicated by bureaucratic procedures and delays. According to one respondent, “transferring parcels to the BLM is an ongoing challenging process that is slowed down by the availability of BLM staff to work on the transfers.” According to a BLM respondent, the agency was constrained from responding in a timely fashion because very few people are trained in acquisitions. In addition, they have “very fixed delegated authority” from the Department of Justice which causes problems when land donors are looking for protection assurances for their donated property or encumbrances conflict with delegated standards. Another observer noted that the BLM’s attitudes toward conservation acquisitions varied depending on the outlook of a specific office. “Some offices are tickled to death [to receive land donations]; others feel like it’s just more work.”

The challenges of dealing with government agencies extended broadly, not just to the BLM. According to one respondent, “There’s some frustration in working with California Parks. Because they are a bureaucracy, they are very slow moving. Funds are there one day and not the next. It’s frustrating so you have to have a long-term view and lots of patience.”

Another respondent commented that these types of delays are not inappropriate and are part of the cost of doing business. According to this individual, “There is a certain naiveté on the part of a lot of funders that they are doing good work, and giving a gift, therefore their gift will be appreciated. And of course, the United States will just accept these lands. The reality is that the United States greatly appreciates this gift and yes, they will accept the lands, but they do have to look gift horses in the mouth. … All of the normal due diligence that anyone would have to do to acquire property, the United States still has to do. So we were aware of that going in, but I think there was this sense that it would be really easy to transfer these lands over because we’re donating them.”

Part of the challenge is that almost all of the acquisitions involve two sets of transactions: acquisition and donation. According to the same respondent, "We had to calculate that for every piece of property that we acquired, there were 2 negotiations and transactions involved. We were going to have to acquire it and then we were going to have to donate it. And they were both going to be full-blown real estate transfers, with all of the duties that that required. In addition, any time that we donated property that was outside of a designated wilderness area, we had to negotiate a donor's agreement that would assure the donor that the property wouldn't be managed in a way that was inconsistent with wilderness. That was a whole other process to develop. I think it frustrated PWC that, at first, it wasn't going as quickly or smoothly as they hoped it would, because after all, we're giving them this stuff, they should be happy. And they were, but they still had all the work to do."

## The Value of Relationships, Partnerships and Long-Term Capacity

Ultimately, much of this kind of acquisition work is about building relationships among people and organizations, and taking advantage of opportunities when they emerge. A number of grant reports and interview respondents pointed to the value of relationship-building in leading up to conservation donations and acquisitions. According to one, "Relationships forged by the League with landowners over many years may eventually bear fruit in the form of willing sellers, even if initial discussions do not lead to a transaction." As described by another, "You have to get to know people, they have to trust you, you have to worm your way into their hearts. …Critical pieces of property just take time. Sometimes it's on a decade-long schedule or maybe longer."

Working with other NGOs and agencies and creating partnerships was also important to the success of many of the acquisition grants. Partnerships allowed for acquisitions that would not have been possible by a single organization. They created the opportunity for pooling money, different types of expertise and contacts. For example, the Friends of the Desert Mountains cited their partnership with the Coachella Valley Mountains Conservancy as an important facilitating factor for their acquisitions. "Partnership acquisitions allow important conservation properties to be acquired which no individual entity would have the resources to accomplish alone. Without the collaboration, acquisition of this property would not have been possible, or at least highly unlikely due to the limited funds the Friends has available." Similarly, in their Sierra Foothills acquisitions, the Sequoia Riverlands Trust points to its relationships with The Nature Conservancy as key to their effectiveness. "Our partnership with The Nature Conservancy remains strong and integral to our success in the Sequoia Foothills."

Partnerships enabled groups to pool funds, share expertise and utilize the unique strengths of different types of groups in bringing many parties to both the start and finish lines of a land acquisition. For example, a constellation of groups were involved in the acquisitions within the Smith River NRA on the North Coast [Goose Creek, Hurdygurdy, etc.] including the Western Rivers Conservancy, the Smith River Alliance, the Smith River Advisory Council, California Trout, Save-the-Redwoods League, the California Coastal Commission, the California Wildlife Conservation Board, the USDA-Forest Service, and others. These partnerships helped Western Rivers Conservancy "build community, statewide, and federal support for long-term land and river conservation." WRC also stated that personal meetings, early engagement, and ongoing communications largely carried out by SRA helped build support among Del Norte County Supervisors and other community leaders. Having the funding available from PWC helped to create incentives for groups to work together, and the informal networking that was carried out through the grantmaking process helped to bridge some of the turf battles that can occur among conservation organizations.

While land acquisition seems to be a fairly straight-forward conservation strategy, in fact, the PWC experience suggests how much time and relationship-building it requires, particularly given the fragmentation of landownership and organizational capabilities in key wildlands areas. The complexity and length of the process suggest a need for stable long term capacity for doing this work. As one respondent reminded us, "A consistent and predictable presence over time in the area is crucial. It is important to not try and accelerate the market pace and increase inflation, but rather wait until properties become available by having capacity to acquire over time. Just because an organization has the money to buy a large number of inholdings at once does not necessarily mean that all of the sellers are willing to sell at once. As landowners become willing to sell later on however, it is important for organizations to have the long-term capacity to acquire lands as they become available."

The need for long-term capacity raises questions about the length of the PWC program, or its successor program, and the way that financial capacity can be built that assures groups involved in the painful process of outreach and relationship-building that when their efforts reach fruition, funds will be available to support acquisitions. As one respondent noted, "Land questions get answered on a generational basis. A five year program is a long program, but the land acquisition folks within PWC recognize five years isn't a long time. If there was a way to structure not so much a great capacity as an ongoing capacity, that would be a wonderful thing. … If someone were to put away $35 million and operate it as an endowment that could spin off $3 million every year forever, we could do a ton of work." Another respondent echoed these themes, "We'd like to be able to stretch the money we have now over a longer period of time, or have a fund dedicated to acquisitions so that when things came ripe for acquisition, you had access to the money. You didn't have to worry about whether it was going to be available in a year when the deal was going to mature."

While long term acquisition capacity is needed, and indeed critical in a state where there is just a five or ten year window to protect key landscapes and their linkages, there is a great deal to celebrate in the five years of PWC acquisitions. Critical parcels in key habitats and linkages were acquired, and the acquisitions themselves create momentum for additional protection. The acquisition program also built expertise in conservation real estate on the part of NGOs and consultants in several key locations across California. Together, the land purchases and the potential for future work are a significant legacy of the PWC program.

# - *6* -

# BUILDING ORGANIZATIONAL CAPACITY FOR WILDLANDS PROTECTION

***To what extent did PWC increase the capacity of the conservation community in California to advance wildlands protection?***

*"The capacity-building work will have lasting impacts across the landscape."*

*""The truth is that without them, we wouldn't have been able to function."*

*"There is far more organizational capacity in California today than before PWC. But whether that's lasting or not is open for debate."*

A hallmark of the PWC program was that it invested in wildlands protection projects while simultaneously building the capacity of the organizations needed to carry out and sustain protection. By all accounts, the capacity-building dimensions of the program were unique and remarkably effective, at least in the near term. Organizations are visible and respected in a number of places where a conservation presence was weak before, most notably in the Desert, the Eastern Sierra and the North Coast. These organizations appear to be the "go-to" organizations in a number of communities, having been embedded within the social networks inside the communities and having established themselves as trustworthy, in part through PWC-funded projects.

All of our respondents claimed capacity-building as one of the major contributions of the PWC program. Indeed, even statewide observers familiar with the sizeable acquisitions program pointed to changes in organizational capacity as the major legacy of the PWC program. According to one staff respondent, "What we did for those NGOs was unbelievable." According to one grantee, "I don't want to overemphasize, but we sure as hell wouldn't have been as successful as we have without them." According to another, "I have worked here for ten years now and experienced our ups and downs and growing pains. We are in a much stronger place now organizationally than in the past due to the PWC funding, both financially, in terms of our organizational systems, and our ability to be responsive and make the most out of the funding we have." According to another, "Without RLFF coming in, we wouldn't exist." A Board member of one funded organization said, "It's just phenomenal—night and day—the amount of work that the organization has been able to accomplish. The growth that it has created. The capacity-building work will have lasting impacts across the landscape."

Building on the multi-strategy model used successfully in the CCLI program, PWC program staff took capacity-building seriously, and the Strategy Book listed capacity building as one of six overarching program goals. It noted that, "Numerous statewide, regional and local organizations are working to protect California's wildlands. A lack of capacity, in terms of administrative systems, strategic plans, resources, training, or the tools necessary to become effective wildland advocates and guardians hamper many of these organizations. PWC will increase the capacity of the wildland conservation movement by supporting assistance and training in such areas as leadership fundraising, planning, communications and board and staff development." Each of the regional analyses within the Strategy Book described existing wildlands organizations and their current capacity and identified a set of specific capacity-building objectives and strategies.

While the PWC funding became a critical source of program funds and an unmatched source of unrestricted funds for many of these organizations, capacity-building was still seen by program staff as a means to an end. The goal was not to build organizational capacity per se, but to advance wildlands protection; that is, to "Expand the capacity of selected conservation organizations to undertake their work in preserving wildlands," as stated in the Strategy Book.

From our review, it appears that the program's investments in organizations stayed true to that vision. That is, they invested in organizational capacity-building but only to the extent that a return was evident (or was likely to be evident) to wildlands protection. Indeed, some organizations received multiple grants to reward success and build on it, while others were not renewed because they were seen as less effective. Being ineffective might have been an argument for more capacity-building funding, but only if the goal was capacity-building. PWC used an experimental approach of seeding work in lots of organizations, and then continuing to invest in those that were successful. From a wildlands conservation perspective, this performance-based approach made a great deal of sense.

## *A Diverse Set of Organizations*

*6.1 PWC invested in a wide range of organizations within California, targeting both well-established and fledgling organizations. RLFF staff used an experimental and adaptive approach to their organizational investments. Their impact on fledgling organizations was particularly transformative.*

PWC invested in a remarkable number and range of organizations within California (Figure 6.1). While some grants were earmarked specifically for capacity-building, all project grants enabled organizations to carry out work which had the side-benefit of building their capacity to do more. As one respondent noted, "There certainly is more organizational capacity in California for completing designations and transactions than before PWC was there. People learned by completing projects and undertaking activities."

Project grants were made to 122 nongovernmental organizations, 33 consultants and 10 university groups. NGOs included a full suite of *advocacy groups*, including national groups such as Campaign for American's Wilderness and The Wilderness Society, statewide groups such as the California Wilderness Coalition, and local groups such as the Ventana Wilderness Alliance. They included a large complement of *land trusts*, including national organizations such as the Trust for Public Land, statewide groups such as the California Council of Land Trusts, and local groups such as the Mojave Desert Land Trust. Indeed, of 74 organizations listed as members on the website of the California Council of Land Trusts, a third received support from PWC. Grantees included *community groups* such as the Mattole Restoration Council and the Friends of the Los Angeles River. They included *traditional environmental organizations* such as Defenders of Wildlife and *nontraditional groups*, including Christians for Environmental Stewardship and Consejo de Federaciones Mexicanas en Norte America.

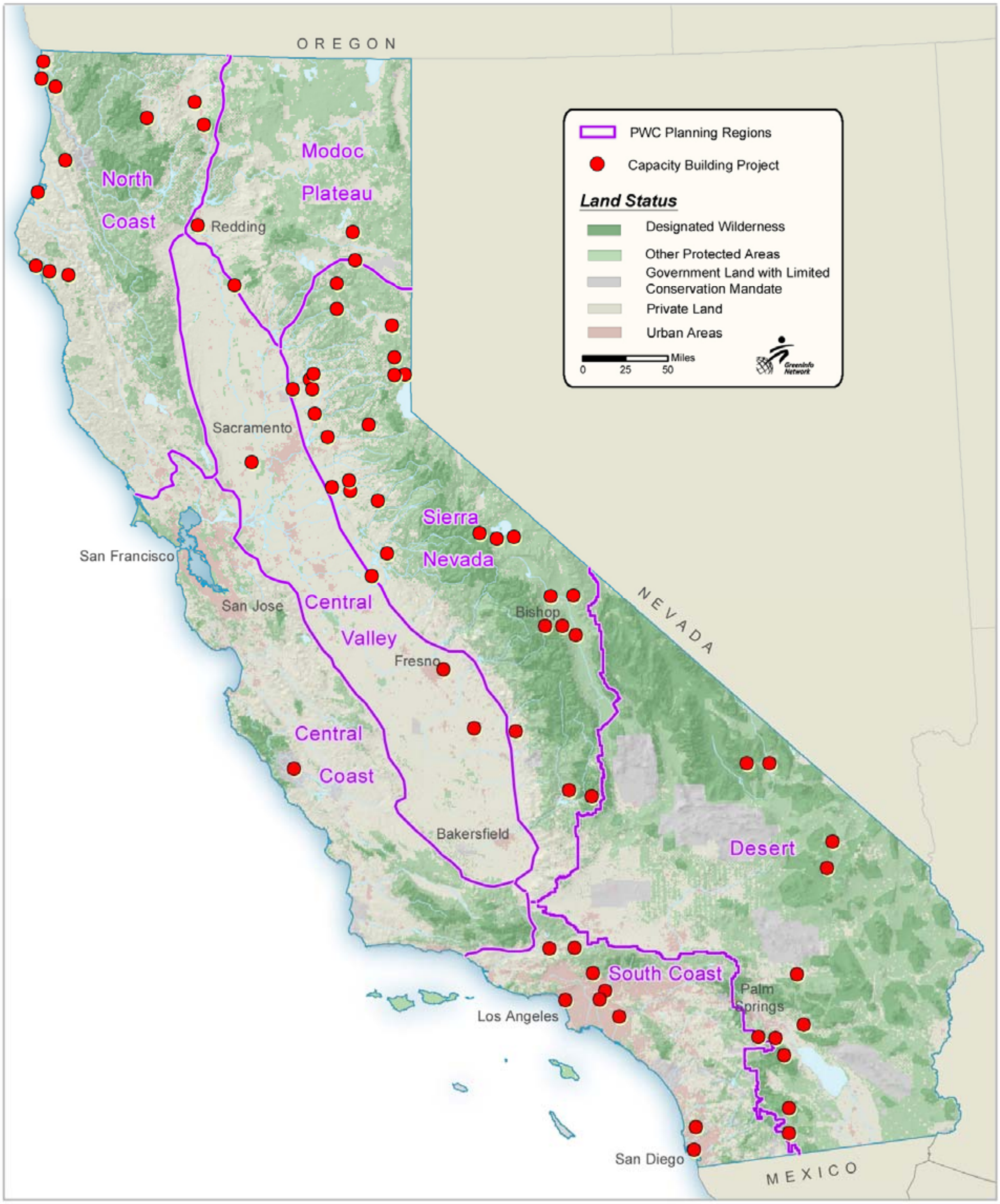



*Figure 6.1: Location of PWC capacity-building projects*

The Strategy Book identified 58 organizations as potential grantees, and 41 of them received grants. RLFF also went well beyond the set of organizations identified in the Strategy Book. Some 63% of the grants made in the program went to groups not listed in the original design.

A significant number of PWC grants were made with capacity-building as their central objective. Of the 453 grants in the program, a little under a quarter were tracked as specifically aimed at capacity-building. These represented $16.8 million in investments in 55 organizations (plus consultants who received contracts to support other grantees.) A little under half of these organizations had been mentioned specifically in the Strategy Book for consideration for capacity-building enhancements. Twenty-two groups in the Sierra received capacity-building support, with six to seven groups in each of the Desert, North Coast and South Coast regions receiving capacity-building support (Figure 6.2).

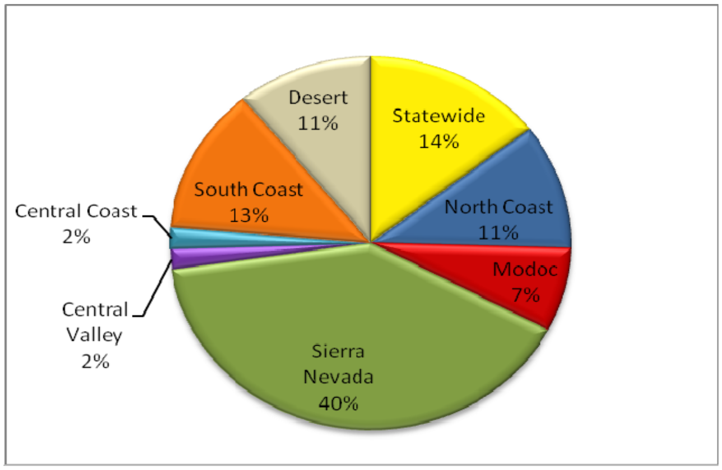



***Figure 6.2: Location of organizations receiving PWC capacity-building grants***

Just as diversity is valuable to ecosystem health, there is wisdom in having a diverse portfolio of organizations pursuing wildlands conservation. For RLFF, some of the PWC grants were speculative investments to see whether fledgling organizations could fly or not. For this, RLFF had the great benefit of having a lot of money and adequate time to try out organizational investments on an experimental basis. Some could fail, but would not take down the larger program's ability to show accomplishments in a five-year period. According to some staff respondents and statewide respondents, some of the PWC grantees did not live up to expectations and did not receive follow-up funding. Others succeeded spectacularly and received follow-up support. Nineteen organizations received multiple capacity-building grants.

## Fledgling Organizations

Much of the PWC capacity-building work aimed at enhancing the capabilities of a set of organizations that existed but were understaffed and were working off "fumes in the gas tanks" of overcommitted volunteers or a part time executive director. These include the Eastern Sierra Land Trust, the Amargosa Conservancy, the Owens Valley Committee, the Mojave Desert Land Trust, the Friends of the Inyo and the Smith River Alliance, among others. Four of these five organizations received two or three capacity-building grants apiece.

Nine organizations received support to hire their first -- or first full-time -- executive director. For these organizations, PWC funding of core expenses and support for a range of organizational development tasks were truly transformative. As one statewide observer noted about the Eastern Sierra Land Trust, "No one else would have provided that initial two-year grant to an unproven land trust. They weren't well known; they hadn't received a lot of attention. … RLFF came in and gave them resources to hire good quality people along with a set of deliverables and responsibilities in the area of fund development, so that the organization could -- within that two years -- establish a membership program, get additional grants, get an acquisition program underway. So that today, they have four staff and they are doing some really phenomenal work."

- **Friends of the Inyo.** When asked for examples of specific PWC accomplishments, a number of our respondents pointed to the Friends of the Inyo as the poster child image of PWC's organizational achievements. One grantee respondent described the transformation. "Friends of the Inyo was basically me, working out of my home office for two years. Thanks to the capacity-building funding from PWC, we now have a permanent staff of five and a seasonal staff of nine. We established the first office of an environmental nonprofit in Inyo County in 2003. That in and of itself is a huge accomplishment."

  "We have made a lot of on-the-ground accomplishments, which has built our reputation. We had one hundred members when we got our first grant; now we have 700 members. … We were a very small fledgling group in the early stages of changing from a volunteer board-driven organization to a staff and shared governance organization. And that transition is very, very difficult. Without the help of PWC and their insistence on outside facilitation and strategic planning, we wouldn't have gotten there."

- **Smith River Alliance.** While located in a very different region of California, the Smith River Alliance faced similar challenges of transforming themselves from a small, frenetic organization into a more professional and effective presence in this rural area in the North Coast. As one respondent described the history of the organization: "I was the first executive director of the Alliance in 1980, and worked for a couple of years to establish the organization. It was incredibly small, and more oriented to project-to-project survival. I went away to my master's program and then came back in 2000 as a pro bono executive director for the Smith River Alliance, completely subsidized by other clients and work. But basically believing this is where we need to be, these are things we need to do. Without PWC, I did not find another partner of this caliber to work with. Others exist … but not with the continuity and strategic involvement, and certainly not with the insight and anticipation that PWC has managed to provide."

  "Back in 2003 when PWC first engaged with us, they did a quick assessment and said you need some capacity-building. And just about every piece of infrastructure you can refer to – the website, our donor database, brochures, development of the Board, cultivation events, fundraising plans – they have touched in some fashion. … And we've definitely been able to serve a critically important role in this salmon stronghold basin, and PWC has been an absolutely critical and timely partner and enabler in that."

## Established Organizations

Other PWC capacity-building grants went to established organizations, including the San Joaquin River Parkway and Conservation Trust, the Friends of the Desert Mountains, the California Wilderness Coalition, Mono Lake Committee, and the Sierra Nevada Forest Protection Campaign. The grants enabled these organizations to pursue initiatives that were more speculative and/or to explore new strategies or structures that might enhance their effectiveness.

- **Mono Lake Committee.** Founded in 1978 to protect and restore the Mono Basin ecosystem, the Mono Lake Committee is a well-established organization supported by 15,000 members and 12 full time staff. Through litigation, education, research and outreach, the Committee has worked to protect Mono Lake and its tributary streams from excessive water diversions from Los Angeles. Eighty percent of the organization's budget comes from member contributions. Clearly it is a self-sustaining organization that would exist with or without PWC funding.

  However, PWC's support [through five grants] enabled MLC to help build the capacity of the Eastern Sierra region, through trainings of local groups, partnerships with area businesses, and creation of a forum for ongoing discussions among the organizations in the Eastern Sierra. "For us, the standout accomplishment is the creation of the Eastern Sierra Environmental Round Table," said one respondent. "It was a natural thing for our role." We discuss the Roundtable more fully below, but PWC support enabled MLC to get over the initial logistical challenges of getting the Roundtable going. While not central enough to the mission of the MLC to underwrite on its own, this kind of regional capacity-building and networking was important to expanded conservation work in the Eastern Sierra region. "PWC funding enabled us to prioritize this effort," said one respondent.

- **Sierra Nevada Forest Protection Campaign.** SNFPC is a somewhat unique case of an established organization because it was not a separate 501c3 organization at the time PWC started investing in it. But SNFPC had deep roots dating back to the 1980s when an ad hoc coalition called the California Ancient Forest Alliance was formed. It was reorganized and renamed the Sierra Nevada Forest Protection Campaign in 1997 as a coalition of advocacy groups. As we discuss in the Policy chapter, SNFPC was an active player in the campaign to secure changes in federal forest management. PWC's investments through project and capacity-building grants, however, enabled SNFPC to move to "an entirely different level of activity," said one respondent. Indeed, its transformation into Sierra Forest Legacy, expanding from a purely advocacy coalition into a broader, more community-based organization was made possible by PWC's funding and advice. "RLFF gave us the space to explore all of that," said one grantee.

## *A Hands-On and Multidimensional Approach*

*6.2 RLFF adopted a hands-on, multi-pronged approach to capacity-building under the PWC program. They recognized that a one-size-fits-all strategy would fall short and instead tailored program support to the particular needs, interests and opportunities inherent in each grantee organization.*

Given the array of conservation organizations in California with unique niches, different histories and varying aspirations, a flexible and strategic approach to capacity-building was needed, and it appears that RLFF approached its work in capacity-building with a belief that different organizations required different kinds of assistance. For some, that involved extensive strategic and financial planning and Board and staff development work. For most, it involved informal mentoring and guidance – providing suggestions and feedback and acting as a sounding board. For others, simply providing project funding enabled a group to build a track record and experience that over time generated capacity for additional projects. Indeed, some grantees eschewed the concept of organization-building. As one noted, "We are not a typical group. We are more focused on getting certain things accomplished. RLFF has understood that the value of what we do is in the programs that we are working on; not to build organizational capacity per se. We have a certain niche to fill."

In most cases, though, a commitment to building capacity – not just getting project work done – was evident in the way that RLFF operated (Figure 6.3). As one statewide observer noted, "They didn't just give [the NGOs] money for staff, but gave them money that would build the organizations over time. It's like the old adage, 'Give them a fish, you feed them for a day. Teach them to fish, you feed them for a lifetime.' PWC taught them to fish."


***Figure 6.3: PWC capacity-building approach***

## Assessments

RLFF staff worked hand-in-hand with individual organizations to assess needs and how they might best be met. For many organizations, PWC work started with an assessment of needs by the group and RLFF, and for some, by external organizational development consultants funded through PWC. The grantmaking style adopted by RLFF [described in Section 4] – hands-on, flexible, interactive and strategic -- helped to promote a dialogue about the ways that an organization could progress. RLFF staff actively engaged grantees, discussing each organization's mission and objectives and the types of consulting assistance and project support that would enhance and sustain capacity. As one grantee noted, "RLFF was much more a partner. It's not like other foundations where our visions are not directly aligned and you need to adjust a project to "fit their vision." Instead we largely had the same vision; so we would have conversations and talk back-and-forth to refine a project or direction so we could best achieve what we were all after." Another commented, "I could *always* pick up the phone or send her an e-mail seeking advice. … I found it extremely helpful; at no time did anyone at RLFF say 'I want you to do *x*'; it is always a bit of a brainstorm and then we decide which direction to go. … They never handed any edicts down."

For a subset of groups, PWC provided funding that enabled them to contract with organizational development consultants, or PWC funded consultants directly to work with the grantees. Having worked with grantees of the CCLI program, organizational consultant Ruth Norris continued working with a number of the PWC grantees. La Piana Associates provided assessments of 17 "key grantees" in 2006 and 2007 in order to "determine how best to ensure the long-term strength and sustainability" of the organizations. The La Piana assessments informed a series of capacity-building grants late in the program's history, and provided summary advice to RLFF in May 2007.

The La Piana assessments of individual grantees involved phone interviews and face-to-face meetings with staff and Board members of the grantee organizations, along with external stakeholders. They assessed eight areas of organizational health: governance, executive leadership, organizational vision and strategy, program effectiveness, staffing and human resources management, financial health, fund development and external communications and relationships. Ultimately, La Piana rated the overall health of the 17 organizations in terms of their organizational capacity and prescribed a set of interventions.

To our eyes, the La Piana reports were thorough and insightful, and RLFF staff described them as very helpful in assisting them with structuring capacity-building grants. The advice in the reports, and consultation with grantees, also provided leverage within the organizations to encourage change. Staff or Board members in some of the grantee organizations knew that they needed to change, but since these changes often involved changes in Board members, staffing or types of activities carried out by an existing staff member, they had been resisted. One of the benefits of an outside assessment is that it raises the credibility of voices calling for change from within an organization. The intraorganizational impact of the assessments, and the subsequent promise of funding by RLFF if changes were made, were significant sources of pressure that encouraged several grantees to respond in notable ways.

Most organizations that were the recipients of La Piana assessments appreciated the opportunity to be examined by an outside consultant. When asked whether the assessment made a difference, one grantee respondent commented, “Absolutely. It was incredibly helpful.” Another noted, “What a wonderful thing they were offering! It was a wake-up call.” One commented that, “We were contacted by RLFF staff, who said this is going to be a lot of work. Everything in the closet will come out, but we will pay for it and it could be incredibly helpful. Do you want to do it? So we sucked it up and did it, and it was so incredibly valuable because of how carefully they assess you. It was a great barometer. Here’s where you are right now, and here’s the serious work you need to do to sustain yourselves. … I want to complement PWC for doing that. It was very valuable to us and our community. That assessment laid the groundwork for our current capacity-building grant. Updating our strategic plan, continuing to improve our Board and advisory group, our first financial audit. These are really major pieces of our growth. What more could you possibly ask for?”

Others felt that the assessment largely confirmed what they already knew. According to one respondent, “La Piana identified a lot of the problems we knew we had. We were already doing an internal assessment. When the La Piana assessment came in, we had a long list of things we already knew we wanted to get done.” Another grantee commented that the three recommendations in their La Piana report mirrored the perceptions of their Board. In this case, however, the assessment was valued because “it validated the Board’s inclinations and gave us confidence moving forward.”

One grantee commented that the assessment used an organizational development lens that did not match their organization. “They tried to fit a square peg into a round hole. They tried to apply a model of larger corporate style nonprofits to small disparate groups who work in very difficult communities. Not a lot of attention was paid to the differences and peculiarities of these organizations. It was a one-size-fits-all model that focused on internal working and governance. And yes, we did need that, but if someone from within the nonprofit world in which we worked had done it, it would have been more helpful. It didn’t really work for us.” To this respondent, the interaction with PWC staff was more helpful: “I would go over to Sacramento and check-in face-to-face. Those check-ins were really valuable. Bouncing ideas back-and-forth; getting their feedback; building the rapport between the grantor and grantee.”

## Board and Staff Development

One set of changes that appear to have developed from the PWC assessment and capacity-building work lies in changes in the Board memberships of several grantees. Most Boards in younger organizations are drawn from founding members who usually have a great deal of substantive interest in the activities of the organization or the place that it works, but little capacity for fundraising and strategic direction. In at least three cases described to us, the RLFF capacity-building work was used to encourage changes in Board membership to move beyond the “founding member” syndrome and recruit individuals who could take on a greater fundraising role. According to one respondent, the assessment report was “A wake-up call to our Board that they didn’t have a critical eye to the organization’s needs.”

The California Wilderness Coalition changed its Board membership and governance process significantly during the PWC funding period, and RLFF's input to this process was not insignificant. The La Piana assessment rated CWC's governance capacity as the lowest of any of the 17 organizations they evaluated, commenting that "The Board is comprised of self-described 'wilderness people' who value wildlands and whose primary interest appears to be in programs and policy. Board involvement was once more campaign-oriented, but now that staff has taken over the program role, the board needs to shift its focus to organization building. This is a normal evolutionary step the organization has failed to make." Through consultation with CWC staff, RLFF staff and La Piana, a set of governance reforms were identified. Those changes in the Board were allegedly made conditions of receiving a PWC capacity-building grant. By some accounts, existing Board members were angered by this process; others in the organization felt that it triggered a process of Board renewal that was sorely needed.

PWC also invested in executive directors and other key staff, in part by providing a level of core support that generated a living wage along with associate directors and additional staff capacity to back-up individuals who were close to burn-out from their workloads. Training opportunities were provided, including for example the opportunity for numerous groups to attend the Land Trust Alliance's annual rally, increasing from 22 representatives of 18 land trusts in 2004 to 43 representatives of 31 land trusts in 2007. PWC consultants such as Shelton Douthit provided training on land acquisition negotiations to grantees, and some of the grantees extended training outside of their organizations to their coalition members. According to one respondent, "With PWC support, we reached out to all of our coalition members and carried out trainings and built the capacity of these small local groups."

## Strategic and Financial Planning

Capacity-building grants supported external facilitation of strategic planning processes in at least 15 organizations, and by most accounts, these planning efforts measurably helped the organizations gain focus and promote shifts of activities among leaders and staff. In the words of a respondent involved in a PWC-funded strategic planning process, "The strategic plan has become our compass; it is a living document. … The workshops held as part of the strategic planning process really helped. We had a pretty sophisticated Board but there were some misconceptions about the role of the Board and the Staff."

Assistance with fundraising and development has also been important, with at least 22 organizations receiving grants supporting fundraising planning and donor development. As one grantee noted, "The capacity grants have been just marvelous. I had certain strategies that I wanted to put into place as far as our fundraising and development work. We were able to hire a manager of donor relations, who has more than paid for herself. I shudder at the thought of her leaving. The second grant was primarily for marketing, to hire a marketing coordinator, and we've requested RFPs for a marketing plan. … These are all things that we've just dreamed about doing."

- **Fundraising capacity at the Sierra Foothill Conservancy.** A $31,000 grant to the Sierra Foothill Conservancy underwrote the costs of a fundraising consultant, staff time and a graphic designer to participate in a series of activities aimed at expanding fundraising capacity. SFC operates in a critical area between Yosemite and Kings Canyon with a primary focus on Fresno, Madera, and Mariposa Counties. In this foothills area, there are significant development pressures yet still fairly large blocks of private ranchlands that could be purchased to mitigate the impacts of development.

The PWC-funded consultant first completed a fundraising audit, which among other things, identified a list of properties that the group wanted to protect over the next 3-5 years, which included nearly 13,000 acres costing over $10 million. “This realization was perhaps one of the most valuable things that came out of the audit,” said the organization in their final grant report. “Although we were hoping to get a significant percentage of the funds for these land projects through state grants, we now had actual numbers to develop appropriate fundraising goals for acquiring, managing and monitoring the properties.” With the assistance of the consultant, the group developed a comprehensive fundraising plan, trained Board and staff on fundraising and major donor cultivation, mentored the SFC development director on tools for running a successful annual giving campaign, and “revamped” their planned giving outreach materials. Goals were established to increase contributed income revenue from $100,000 to $400,000 and expand membership from 1,000 to 2,000 members in 3 years.

## Technical Assistance

Many groups received technical assistance, depending on the needs of their projects. For some that involved support by consultants that worked directly under contract with RLFF, or PWC-associated contractors that worked on grants provided to the nonprofits. GreenInfo Network provided maps to all grantees involved with land acquisition projects, and indeed, their maps are one of the consistent spatial images associated with many of the California conservation organizations’ grant proposals and websites. Shelton Douthit Associates provided surveying and real estate transfer expertise to many of the PWC grantees involved in land acquisition deals. Indeed, for some such as the Mojave Desert Land Trust, there would be no way they could have functioned without his assistance. According to one respondent, “Shelton had been pursuing some landowners for more than a decade, and his guidance was invaluable. … We weren’t dealing directly with landowners at the land trust.”

## Communications and Message Framing

PWC also supported media training, and work on communications strategies and the framing of advocacy messages, including activities by Spitfire Strategies, Randle Communications, Wilson-Miller Communications, GreenInfo Network and several photographers under contract to capture images of project sites. A significant amount of work was carried out by Resource Media, a self-described “communications shop that provides media strategy and services to non-profits, foundations and others who are working to protect communities and the environment in the West.” For some grantees, this advice was critical to their ability to get good press for their advocacy work. Resource Media “challenged the environmental community to get smarter about messaging and messengers and how we do our work,” said one respondent. “That’s their hallmark. It’s not just ‘us versus them,’ ‘loggers versus environmentalists,’ the normal playbook that reporters love to go to. Setting up the frame in that same boring way. Resource Media is good at breaking out of that frame, using nontraditional spokespeople, using scientists, getting away from litigation and talking about values. It's very powerful."

He continued, "How you think about what you do, how you talk about what you do, and how you support what you do in all of the different media venues is thought of totally differently than what I thought my job was 5 or 6 years ago. I thought my job was to show the rest of my community how well we were defending the resources for them. That's what I thought my job was. I don't think that is what my job is anymore. They get that message in other ways, but that's not how I approach the LA times, or the Chronicle, or the Sacramento Bee in writing an op-ed. … Now we talk about who are going to be the voices when we talk to the media? And if there is no good media story for us then we just stay out of it."

## *Investing in Individuals Not Just Organizations*

*6.3 Through grants to organizations, RLFF simultaneously invested in individuals, and were effective at selecting passionate and committed people with a track record that demonstrated potential. One of the legacies of the PWC program is the mosaic of talented individuals whose capabilities were enhanced through participation in program activities and trainings.*

While building institutional capacity is important because it allows continued activities in the face of transitions in Board or staff, PWC simultaneously supported the work and motivation of a network of individuals. The notion that "people make a difference" can seem trite, but it is important to recognize the value of individual contributions to wildlands protection and conservation. By funding organizations, PWC also made important contributions to individual capacity and empowerment.

A number of respondents reminded us of this. As one staff respondent noted, "At the end of the day, it all comes down to good talented people who have the ability to grow and expand, who either are doing effective work or would be in a position to do effective work if they had more resources. When I think of areas where we made the most difference, I instantly think of the people within those organizations who were effective leaders or had the ability to be effective leaders with additional training."

The midterm assessment of the program by Kevin Sweeney also highlighted this theme. "So much of this program is about investing in people–finding very talented people and investing in them." And while the La Piana assessments were nominally about organizational capacity, many of the judgments within them are about individual staff and Board members and how they collectively build organizational competence.

In our own five-month review of the program involving hours interviewing many individuals who were involved in the program, we came away extraordinarily impressed with the professionalism, passion and commitment of most of the grantees and program staff. We doubt that there are many states with the same level of energy and professional conservation capacity. Wildlands protection and conservation work was not just a job for most of these people; it was a cause that occupied them 24/7. And by all accounts, the work underwritten by PWC has resulted in more individual nodes of activity across California.

One of the best outcomes of the PWC program may have been the creation and reinforcement of a mosaic of individual capabilities and commitments dispersed across the California landscape. While there are other ways to build this capacity – through fellowships, training grants and the like – and there may be ways to reinforce it across the conservation community, an effective way to build people's capabilities is to engage them in project work while giving them opportunities to reflect and analyze their roles through organizational assessment and strategic planning. Indeed, a number of respondents commented on the aging of the environmental movement in California. La Piana Associates characterized this as the "aging out" of the baby boomer environmentalists. "Many organizations are characterized by primarily white, largely 'baby boomer' boards, executives, staff and supporters," noted their final report to RLFF. Investing in individuals seems critical to development of a more professional, diverse and enduring set of conservation activists.

## *Building Networks*

*6.4 PWC helped establish networks that connect geographically-dispersed organizations, which facilitates communication, coordination and joint learning. These networks appear to be thriving, and are serving as productive forums for land trusts in particular.*

While California is blessed with a large number of conservation organizations, it can be challenging to coordinate these diverse players and ensure that their activities are synergistic. Indeed, even though there are a lot of organizations dispersed across the state, the "geographic isolation" evident in many remote or rural areas where wildlands are located – to use La Piana Associates' term – requires interconnections between groups so that they learn from and support each other in statewide policy campaigns that help to advance their on-the-ground activities.

RLFF recognized the need to coordinate activities among grantees and others in the California conservation community, and invested in several activities to build networks among these groups. While we suggest in Section 4 that there was less peer-to-peer learning among grantees than there could have been, PWC grants did help to create organizational networks in the areas of wilderness advocacy, land trusts, and regional forums. Investments in campaign-focused networks are described in Section 7, and support for the California Wild Heritage Campaign helped create a centralized coordinating structure. Indeed, when the initial concept of a strong centralized staff was deemed inefficient, CWHC adopted a coordinating council structure, with work done by individual members. PWC also invested three grants in the Sierra-Cascade Land Trust Council. The Council provides training, coordination, communication and visibility to its 19 member land trusts, and positions them to benefit from funding from the Sierra Nevada Conservancy. Other investments in networks among land trusts and regional consortia of environmental groups may have long-lasting effects.

- **California Council of Land Trusts.** PWC helped support the process of creating the California Council of Land Trusts (CCLT), which was formed in 2004 after 18 months of regional meetings and discussions about conservation needs in California. "There wasn't a single body that spoke on behalf of land conservation," explained one respondent. "We had more land trusts in California than any other state but we had no organized forum or ability to act or communicate together." Another respondent commented that CCLT "has filled a void that we all knew existed; that group has really got it together." RLFF leadership and staff provided input and feedback on how such an organization should be structured and funded in the early days of the organization's creation.

PWC provided three grants to CCLT which totaled $475,000 in support, and the amount of funding increased across the three grants. The initial grant in 2004 enabled the fledgling group to develop outreach strategies to build the land trust network along with a fundraising plan. Over time, they developed an action plan, a website, email newsletters and action alerts, a funding database for member groups, GIS maps and a policy committee to help the organization engage in statewide policy issues such as Proposition 84. CCLT hosts a bill tracking system to enable member groups to follow policy campaigns that affect the land trust movement. While most such groups are dependent on foundation grants for financial support, RLFF encouraged CCLT to bolster membership dues to build ownership in the organization. As a result, dues fund more of the organization's annual budget than is true in the national association of land trusts (about a third of the budget in the first year, compared to 8 percent nationally).

As a result of the PWC investments, "A network has been created state-wide. …We have a forum where issues of common concern can be worked out. We never had any way to have these conversations before," said one respondent. "The PWC support gave us credibility and legitimacy; it enabled us to have the expertise and information that ensure that we prevail." CCLT also saw the need to build bipartisan support for land trust work, which is consistent with PWC Policy strategies aimed at getting Republican support for wilderness. "The distribution and location of our members in many conservative communities creates an opportunity to cultivate relationships. If we can increase Republican support on important matters, it can also help our members in more conservative areas be engaged in policy matters because it will lessen the strength of arguments that a land trust is too liberal, green, democratic or other similar attacks."

- **Eastern Sierra Environmental Round Table.** A regional forum for coordinating efforts among environmental organizations was started in 2004 as a result of PWC funding. One respondent commented on the impetus for the Round Table: "It used to be easy to keep track of conservation activities in the Eastern Sierra because there were only four or five people to keep in touch with" and they readily did so via phone. With more groups emerging including the set of groups supported by PWC (Eastern Sierra Land Trust, Friends of the Inyo, Owens Valley Committee, Mono Lake Committee), there was a need for a more formalized mechanism to promote communication and coordination, "to work through issues together before they get out-of-hand." According to this respondent, environmental organizations elsewhere in California often have a level of animosity toward each other -- a "jockeying for turf," "fighting for the same members," "groups rubbing elbows"-- that gets in the way of their ability to focus on issues and get something done.

  The Mono Lake Committee proposed establishment of an Eastern Sierra Round Table to RLFF and received funding in 2004 to establish it. The PWC funding enabled the Round

Table to get over the initial logistical hurdles that usually confront these types of gatherings. "Simple things don't happen without both the funds and logistical capacity to say 'we're meeting in this place, at this time, and lunch will be provided.' Everybody comes. Otherwise you spend years saying 'we should be getting together on a more regular basis' and everyone agrees but no one has the time or ability to arrange anything and it never happens."

The ESERT meets on a quarterly basis. It has provided a forum within which communication and coordination can occur, issues can be resolved, and concerns can be raised. It has established relationships between individuals and organizations active in conservation initiatives in the Eastern Sierra, and has provided the mechanism for managing the inevitable tensions associated with a growing conservation community. Its April 2008 meeting focused on ways to adapt to climate change. The ESERT also has facilitated the development of joint proposals, most notably to the Sierra Nevada Conservancy. The SNC looks for collaboration and partnerships and the ESERT has facilitated these relationships. Several joint proposals have been advanced for SNC funding, all facilitated through ESERT interaction.

## *Significant Organizational Outcomes*

*6.5 Quantifiable, visible organizational gains are readily apparent as a result of the PWC work on organizational capacity-building. Gains in strategic outlook, funding and fundraising, and staff professionalism are evident in many grantees.*

### A More Pragmatic, Strategic and Community-Based Approach

Many grantee respondents commented that their involvement with the PWC program has produced a more strategic view of their missions and ways to accomplish them. Some of these changes came from strategic planning enabled by capacity-building grants and some from having the opportunity to experiment with new strategies. Perhaps one of the biggest changes has been in the transformation of perspectives on the part of some of the PWC grantees toward a more proactive and community-based conservation approach. As one respondent noted, "We were just doing the same old song and dance and beating up on the agencies and racking up paper victories that didn't translate to change on the ground. We got together as an organization and realized that business-as-usual wasn't going to change anything; we weren't getting anywhere and while we were sitting fighting, the land was going to pot because no one was taking care of it."

- **Sierra Forest Legacy.** A similar change in perspective was evident in Sierra Forest Legacy [as discussed in Section 7.] As described by one respondent, "we were masters at the word 'no,' but challenged about how you lay out a vision for what 'yes' is." We had a strategic planning meeting in 2005 where we discussed where we intended to go. We had a vision of ecologically-sound resource management. To do that we needed to work in the community on Fire Safe Councils, and engage in small wood and biomass projects. RLFF asked, 'can you do this?' They saw that this was a really important thing to do and encouraged us."

- **Smith River Alliance.** Respondents familiar with the Smith River Alliance also commented on the importance of a community-based approach. “We are in a county that is 80% public land. There is a population of 28,000 people in the county, and our major economic sector is tourism. It you don’t concern yourself with community health then your extraordinary work on watershed health will be compromised. You need to have a supportive and engaged community in these remote areas to save it in the long term. In the long term, you need a healthy community. We have invested in that very heavily.” Through a PWC-funded planning grant, they developed a stakeholder agreement with all the stakeholders in the county and matching funds were developed with the Forest Service cost-share program. SRA provided $15,000 of the necessary match to support a visitor services website. According to one respondent, “the tribes signed onto the agreement, the county, the parks, the Forest Service. That really means something in a rural community.” Indeed, the SRA website gets more hits than other visitor-related websites available, and they are looking into how to continue to build partnerships and relationships in the community.

  A negotiation with the Board of Supervisors over a proposed acquisition illustrates the positive effects of this community-based approach. After one acquisition and land exchange became very contentious, another project – the Goose Creek project – came up because of a willing seller. “We were adamant that it was incredibly important to go to the county immediately, to go there first, and acknowledge with them that there would be a sit-down conversation about how to compensate them for lost taxes. They appreciated it and we had superb letters of support from them throughout that fundraising process … They felt respected as a result of that kind of approach and engagement. It took several months and a lot of coordination with them.”

## Level of Professionalism, Impact and Future Capacity

Both grantees and statewide observers pointed to the increased level of professionalism associated with a number of the organizations that received capacity-building grants. Investments in planning, coaching and the hiring of new staff have created organizations that look and feel more like professionally-run nonprofit organizations than ad hoc volunteer groups. Many now have strategic plans, credible financial accounting practices, human resources procedures and staffing, and Boards that are not just well-meaning individuals but individuals with expertise who recognize their governance and fundraising responsibilities. That several of the land trusts are now working towards accreditation by the Land Trust Alliance suggests that they recognize professional standards of conduct, practices that they were either unaware of or simply felt they lacked the time to get it right.

Some groups have clearly been able to increase the level of their game through expanded expertise, more strategic engagements and better media work. According to one respondent describing the battles over the direction of the Sierra Nevada forests, RLFF funding gave them “the ability to play the land management game at a very sophisticated broad level. Where we had the staff capabilities and the funding we needed to bring in outside consulting support if we needed it. …Having the time to not only read the research of key researchers but read their references; knowing the researchers and building trust with them; going out on the ground to visit research sites. … We could keep the staff lawyers, science and policy experts fully engaged at the policy level to stop the overall aggressive treatments and then have the legal team build the legal arguments to defeat them and keep the resource damage to a minimum without vaporizing ourselves through overwork."

Supporting the work of conservation-friendly consultants also creates capacity for future mentoring work. The more familiar consultants like La Piana Associates are with the particular needs of conservation organizations, the more likely that future interactions will be effective. For example, building the business of Shelton Douthit Associates, whose current staff of seven employees is engaged in almost entirely PWC-related work, and whose relationships with on-the-ground willing sellers are incredibly valuable to facilitating conservation purchases, has been an important outcome of the program with implications for future conservation acquisitions. "I think we've really refined it to an art form– like the Ford Auto Plant of land acquisition for non-profits. …We are dealing with thousands of property owners every year, mostly work in the desert on inholdings, but we've also worked with PWC recipients throughout the state, doing due diligence, hazardous materials inspections, and a moderate amount of training." Supporting the development of conservation-related databases and GIS capability by GreenInfo Network has similar long term benefits.

## **Funding**

A number of grantees shared stories of the increase in their budgets which took place through the period of PWC investments. As representatives of the Smith River Alliance noted, "One yardstick for success can be seen in monetary terms. Our 2003 tax returns showed income of less than $500,000. In 2007, it's $1.6 million." From the Friends of the Inyo, "We used to count our unrestricted income in thousands of dollars, now it is in tens of thousands of dollars. We expanded, sometimes almost scarily. Now we receive more than twenty different grants and contracts every year. With expansion has come a lot of different things we can work on." PWC provided start-up funding for the Amargosa Conservancy, in order to build organizational capacity for protection of the Amargosa River watershed, a PWC priority area in the Desert region. The Conservancy was first operational in 2005, with FY2005 revenues of $50,000, all PWC funds. In FY2006, its revenues rose to $355,000 with RLFF grants consisting of 21% -- a significant diversification in one year.

- **San Diego Foundation.** PWC also supported building other sources of long-term private funding for conservation. For example, PWC supported the San Diego Foundation (SDF), a community charitable foundation with a growing focus on environmental issues, to help broaden the base of philanthropy for conservation in San Diego. SDF provided technical assistance and funding to conservation organizations. In 2004, they raised more than $800,000 to advance land and watershed conservation in San Diego County in the form of both grants and endowment funds. With PWC support, SDF created a grant portfolio with a balance of organizations in terms of geography, size, and conservation mission. They also established challenge grants for their grantees, establishing small fundraising targets and matching the funds raised. "They helped in one year to double our budget for local conservation groups and that in turn helped us do things, support groups to work together in different ways than we had before, and not only help them, but it also helped build our programmatic capacity," a respondent explained. Having more funding generates greater incentives for undertaking conservation work. "When you have more money in the pot, you attract more money. It's basic human nature."

## *Credibility, Trust and Confidence*

> *6.6 While PWC's investments certainly improved the organizational infrastructure of many California NGOs, they also enabled the groups to build legitimacy and influence within their communities, and instilled a sense of confidence within the organizations themselves.*

Improved organizational systems and enhanced staff and leadership create a structure through which organizations can get things done, but those achievements have ripple effects in the communities in which these organizations work and in the philanthropic community. In the words of one of the organizational development respondents we interviewed, these are "multiplier effects -- confidence, connections, proof of capabilities, visibility, credibility, legitimacy. That they are reputable, respected organizations. The go-to organization."

Many of the PWC-funded organizations saw themselves as being viewed with increased respect and a heightened sense of trust, having demonstrated their credibility and commitment to practical solutions. For example, a consultant hired through a capacity-building grant made to one group did an external scan before and after implementing a strategic plan, and found a significant difference in external perceptions. In 2003, according to a representative of the organization, "We were the average conservation group liked by our friends and disliked by our enemies. After implementing the strategic plan, it was night and day different, in terms of the level of respect for the approach that we have taken. People look to us and are calling us because they realize we are here to get things done."

As these external perceptions improved, the organizations themselves appear to act with an increased sense of confidence about their roles and abilities. And in turn, these changes help the organizations accomplish more conservation work on-the-ground. In this way, small seed investments in organizational capacity-building can lead to very large long term gains.

According to one grantee, the PWC funds gave them a "stamp of approval" that made it far easier to attract other funding: "The last year, we got a grant from the Annenberg Foundation, a very significant grant, that if PWC hadn't been funding us, I don't think Annenberg would have given us the money, because we wouldn't have had that kind of stamp of approval, so to speak. [RLFF] takes a little bit more of a risk with a smaller group like us, and then that allows a much more established foundation to say, 'okay, these guys might be doing something good'."

- **Mojave Desert Land Trust.** For the MDLT, a start up organization based in Twenty-Nine Palms, PWC support not only enabled them to carry out important inholdings acquisitions, it built their reputation and sense of confidence. In one respondent's view, "RLFF was our bootstrap. It gave us credentials. … We are now asked to the table, and are looked to as a leader in the region. … Without PWC we would be a struggling little organization, with donated offices without easy access. People can access us; we can respond to people because we have more than just a one-person staff; all those things that make you look viable."

MDLT received significant amounts of funding from PWC, including approximately $6 million in acquisitions funding and more than $1 million in capacity-building grants. Much of the acquisition work was carried out by Shelton Douthit under contract with MDLT, but one of the acquisitions in particular, helped build MDLT's image in the community. Purchase of the 638-acre Nolina Peak parcel adjacent to Joshua Tree National Park protected a viewshed and a segment of an important wildlife corridor linking Joshua Tree to the Bullion Mountains, and has provided a development buffer for the park. Further, because the parcel of land to the north of Nolina Peak was a BLM parcel that could be conveyed to the National Park Service, the acquisition would expand the protected area considerably.

For MDLT, however, the acquisition "was pivotal," according to one respondent. "It gave us teeth and gave us a name with which to play with these agencies. It helped to create an incredible network of collaborative partners, and that is a large part of our capacity building. … We are now asked to the table to help with open space planning in the basin. We are looked to as a leader in the community; because we completed a goal that we broadcast to the community. … If we didn't have that initial success we wouldn't have this reputation; people wouldn't take us seriously. We would not have made it; we would have been perceived as ineffective." Now, "people call us" when opportunities arise, "we are at the top of the list." In fact, "we are parenting the citizens group that is working towards developing the first greenbelt in Yucca Valley. These are not citizens who have been advocates in the past. They are just landowners next to the parcel, saying we have lived here all of our lives and it does not seem right to put it into little tiny houses. That's a sign of our reputation and effectiveness in the Valley that they came to us to help them with that."

The organization's leaders see it as a "thought-leader, inspiring other organizations – both public and private -- to stay on top of issues in the region." For example, MDLT hosted a conference on climate change, and has been distributing video tapes produced from the conference to others. "We are tiny but mighty," one respondent commented. How big a roar MDLT has will emerge over time and will depend in part on how well it develops its Board, fundraising capacity and other organizational systems. Nevertheless, it seems clear that the PWC funding helped to empower the leaders and staff of the organization, with some significant outcomes for wildlands conservation in the Desert.

## *On-the-Ground Outcomes*

*6.7 It seems likely that a number of conservation outcomes attributable to the PWC program would not have been achieved without PWC's investments in organizational capacity. One of the key enablers of on-the-ground action may well be a change in the cultural and political dynamics of conservation in rural California communities, assisted by PWC support of small, grassroots conservation groups.*

PWC's considerable investments in capacity building appear to have caused changes in on-the-ground conservation in two ways: First, organizations that function more effectively can achieve more on the ground, and many of the outcomes that have been described in other sections of this report were partly a result of the enhanced effectiveness of groups that received capacity-building grants. Second, by investing in many small community-based organizations, PWC appears to have helped change the cultural and political dynamics surrounding conservation in a number of small, rural communities in California. Ultimately these changes create the potential for environmental gains in places where environmentalists have recently been seen as the enemy. Both are important outcomes of the capacity-building work and both tie directly into benefits for wildlands protection.

## Support in Rural Communities

By supporting the work of many small land trusts and conservation organizations, PWC has contributed to an important transformation in rural communities adjacent to important wildlands areas. As one observer noted, "The California conservation community is **very** different from before [PWC] started. There are a lot of small grassroots groups in place now doing phenomenal place-based work. Doing work that national groups could not and are not interested in doing. That is how you make change on the ground."

Indeed, grassroots-level organizations may focus on wildlands that would otherwise fall through the cracks because they are too small, off the list of priorities of national-scale groups, or may have characteristics that do not fit the programmatic niche of others. Lands that may have had some prior mining activity, for example, and may be in need of restoration or reclamation attention may be neglected by the larger groups. As one interviewee commented: "If it's not vanilla, the TNC doesn't want it." Or as others noted, "If it isn't a large sexy acquisition, the TNCs and TPLs are not interested."

- **A cultural shift in the Eastern Sierra.** In a number of places, PWC support of grassroots conservation groups has changed the political dynamics at the local level. As one respondent from the Friends of the Inyo noted, "one of the things we have been able to do is to reframe how many of the more traditional folks in this area view conservation and what conservation is. It is no longer we're the environmentalists and we're here to sue; now it's we are here and how can we help you."

  He continued, "A decade ago, it would have been unheard of to have a rural Eastern Sierra county supervisor support a wilderness bill. But we have worked with everyone across the table. … What our organization does is try to work with local people rather than blowing them up in the paper. For example, we have used our advocacy work to remove road blocks for wilderness designation. We've removed a lot of places that people would point to and say you are locking me out. Through different regulatory actions, we've removed over 200 miles of road from proposed wilderness areas that are no longer an issue. We've also been very active in a process called route designation. A phenomenally contentious issue, yet we've been able to pull together a collaborative team and come up with a proposed route network document that was signed by conservationists, motorized advocates, and county supervisors. That had never happened before. Through that process, not only have we been able to build new bridges that I hope can survive the wilderness process, but also removed some real problems on the ground to these proposed wilderness areas. We wanted to get to the stage that if you object to wilderness, it is purely philosophical, not because of barriers on the ground."

"And it came from sitting down with people and helping them realize that you respect where they are coming from. That's one of the biggest problems the conservation community suffers from especially in the rural West. We march into a place and all of a sudden, we're going to propose this or designate that. You set up a dichotomy that we care for the land and you don't. The only way to get anywhere then is to roll people. And that kind of politics is not really working anymore."

In another example, "I was sitting in an Inyo County Board of Supervisors meeting a few weeks back when one of the motorized people got up there and started bashing [my organization]. And one of the most conservative Supervisors who had never seen a wilderness bill or conservation initiative that she liked stopped him and said, 'you aren't doing yourself any good by bashing people who are doing good things on the land. They actually are doing good things; you just don't believe in their philosophy.' That is a cultural shift for somebody who largely disagrees with what we stand for to support us because she knows that we do good work. And how does she know that? It's because I took her kids out fossil hunting on a Boy Scout trip. We have woven ourselves into the community. That is the biggest impact of the RLFF funding on the East Side."

- **Transformations in the Desert.** The Amargosa River flows largely underground for 125 miles from the border of Nevada to the Badwater Basin in Death Valley, California. Along the river are biologically rich oases resulting from springs, seeps, marshes that support one of the most impressive collections of endemic, isolated, and imperiled species in the United States. The U.S. Bureau of Land Management has determined that the Amargosa River was eligible for federal Wild and Scenic River status, and The Nature Conservancy (with PWC funding) has completed an assessment and conservation strategy for the three million-acre Amargosa system in both California and Nevada. However, both TNC and the federal land management agencies are spread too thin to address the threats, and more importantly, lack the credibility and relationships within the local community to secure protection.

  Through PWC funding, the Amargosa River Conservancy developed a community-based approach to conservation that has built understanding and relationships which have led to tangible conservation outcomes. According to one regional observer, there have been two major transformations that have occurred in this region of California. One was many years ago when a community-based initiative brought health care programs to the area, literally giving life and hope to this out-of-the-way place. She likens the transformation that has occurred with the PWC Program support to be on a par with the healthcare era. The community is now working together in a more cooperative and respectful way. In her terms, "We all lived in the community because we loved the land and we could see the influx of people destroying the land. We asked how can we have an economy while also protecting the land that we cared about? … These people – the ranchers and the miners – love the land just as much as we do. They are just fearful of change, and the intentions of outsiders. The supervisors are very conservative; it's hard to get a paradigm shift. But we all did agree that we had a problem. It just took time to get people to realize that we don't have to approach it in the old ways."

In her view, the Conservancy went about its work in several key ways: "The Board carried the load of the conservancy. It gave us credibility within the community, county and Nevada. They were all people who were respected and whose hearts were in the community. They cared about the people and the place and because they were respected and had seen what had worked in other places they were able to give people a different worldview."

Demonstrating to people that environment and economy could support each other was critical, as were opportunities to "walk the land together." As one respondent described, "Showing people through examples. It doesn't have to be either/or or black and white. We can have both ecological and economic sustainability." Through a variety of community events and field trips organized by the Shoshone Museum, misconceptions were exposed and relationships built. "Through the museum, they take lots of field trips annually with 40-60-70 people where they learn about the full array of issues, including conservation and endangered species. But the titles and bylines are all about history of the region. Through these trips, you can have conversations about issues that people have misconceptions about or are fearful of. Highlight where off road vehicles can go; learn that we're not against everything. It's important to get people on common ground; then people start talking, enjoying their time," while removing misconceptions and diminishing fears.

Over time, the inroads to the community led to change in the behavior of elected officials. The conservative county supervisors who do not support the concept of wilderness are nonetheless supporting Wild and Scenic River designation for their portion of the Amargosa River. "We got great support from the County Supervisors because it was not outsiders telling us what to do. … There is almost no conflict" which is unheard of. This respondent is emphatic in claiming that none of this would have happened without the PWC funding and the support from RLFF.

### *Sustaining Organizational Achievements*

*6.8 While many of the organizations funded by PWC stand a good chance of sustaining their effectiveness into the future, the loss of unrestricted funds will redirect some organizations into a narrower, funding-driven agenda. In some areas, a lack of funding may result in a need for consolidation across organizations.*

Facing a future without the PWC program, many grantee respondents were concerned but not panicked about the ability to sustain their activities. Indeed, we heard more concern from statewide observers than from the grantees themselves. They particularly identified the youngest groups operating in the most rural, conservative areas as worthy of concern, groups such as the Amargosa Conservancy and the Mojave Desert Land Trust. As one observed, "With the Amargosa, my biggest worry is sustained funding. They get about $12 to $15,000 annually in donations and members fees; they have about 100 members. But they have a $100,000 annual budget. They have about a two and a half year window after which they really need new funding sources."

It is clear that many of the factors that made organizing and fundraising challenging before the PWC program are still in play. The La Piana Associates final report identified five challenges to organizational development and sustainability, and these provide a good lens for evaluating changes in the context for organizational sustainability:

- *Economic factors*, including project grants that do not cover overhead, a lack of foundation funding for unrestricted funds, a drop off in LWCF and other public funds for wildlands protection, and the rising cost of land.

- *Geographic isolation*, largely the rural and sparsely populated target areas for conservation activity.

- *Cultural isolation*, the white and aging base of conservation organizations leading to a need to connect with younger and more diverse constituencies.

- *Communications*, the challenge of framing a compelling argument when global warming and energy independence issues are "sexier."

- *Inefficiencies of scale*, the cost of having many small unlinked conservation organizations. Indeed, we did hear stories of competition among groups for limited funds, of turf battles, uncoordinated activities and "rubbing elbows."

But a number of these factors have measurably changed, in part due to PWC's investments:

- *Economic factors:* While the unrestricted funding problem is a real challenge for these groups, PWC capacity-building grants have helped clarify and focus some conservation organizations' missions and helped them build fundraising plans and development infrastructure that should enable them to access a broader membership and funding. Passage of Proposition 84 and creation of the Sierra Nevada Conservancy should help provide additional state funds for conservation purposes, and a number of the PWC grantees should be well-positioned to secure those funds. With a change in Federal administration, there may be greater opportunities for funding for public lands and their management, though the federal debt and deficits are enduring constraints. With the economic decline and bursting of the real estate bubble, land prices should be more reasonable and some sellers may be more motivated to sell in a buyers-market.

- *Geographic isolation:* By promoting a more pragmatic, community-based form of conservation advocacy, PWC grantees have seen a remarkable amount of responsiveness to the need to protect wildlands by rural, conservative communities, and their elected leaders. If the relationships and understanding that have been built by groups like the Friends of the Inyo, the Smith River Alliance and the Amargosa Conservancy continue, then this presumed problem may be less challenging in terms of its politics, though the ability to raise funds from lower income and less populated areas remains.

- *Cultural isolation:* PWC did try to work on linking wildlands issues to nontraditional constituent interests, though that work was just a start. Certainly the outreach to Republicans was an important shift in wilderness policy, and we can expect to see additional Republican sponsors of wilderness bills, in part because the experience of the past five years has demonstrated that wilderness can be a good, bipartisan issue in some districts. Paying a living wage to employees helps recruit younger people into conservation work, though the current face of conservation across California is still middle-aged and white.

- *Communications:* While there may be challenges framing wildlands conservation as the hottest topic, in fact, linkages are visibly being made between the impacts of climate change and the need to secure corridors and blocks of land for adaptation and watershed protection purposes. Fire management and water supply issues are high on the list of issues facing most California communities, and the extent to which they are linked to ways to protect and restore wildlands areas may provide increased attention to stewardship and protection issues. The energy independence issue connects extremely well to land use and growth management issues, and as gasoline costs have increased, people have been willing to support different patterns of development. Renewable energy development has run squarely into wildlands protection issues, though mostly as a conflict. Nevertheless, the sense of crisis associated with the "glassification" of the desert will force people to clarify values, mobilizing some to advocate for protections and others to use the interest in these landscapes for development as leverage to secure protection for critical areas.

- *Inefficiencies of scale:* We did hear continuing concerns about the fragmentation of conservation activity as additional organizations step into the fray. A few respondents argued that overcapacity might be an emerging issue. As one noted, "There are a lot of land trusts out there now. There is a need for capacity-building, but it should be done smartly. You don't want to overbuild a lot of really small organizations. At some point they are going to have to look at consolidation of some of these land trusts. How do you respect people's desire to be involved locally while recognizing that a lot of work does require deeper pockets and deeper bench strength than an all-volunteer or one-person land trust can bring to bear?" Certainly PWC-supported efforts to build network linkages among groups, such as through the establishment of the California Council of Land Trusts, may help in coordinating and finding synergies among group efforts. Successes in wilderness policy may dampen down some of the noise among conflicting advocacy voices, as attention turns to getting wins rather than just getting press. But as local capacity is built, there are ways to increase peer-to-peer learning and relationships so that we do not see inefficiencies of scale.

All interviewees bemoaned the ending of the PWC program and saw its focus on organizational capacity building as particularly unique and valuable. Most prayed for a follow-up program that would generate both project- and organizational grants. But most grantees were optimistic, at least in response to our questions, about their increased ability to sustain themselves over time. One grantee's response was typical: "I'm concerned but not freaking out. I know that we are not going to go away, because we have relationships with other foundations and we have built up our membership to the point that we can survive. It will be tough and will be much more project-driven. … You can nickel-and-dime yourself to death with too many projects if you run after every one. And [without unrestricted funding] you can't sit back and keep a holistic view of where you are going. But I don't think that we are there, because PWC encouraged us to look at organizational development as one of our core programs and we did."

Groups clearly worry about the shift in funding to project-level support. As one said, "I worry that groups like ours will survive but our programs will shift and our day-to-day workload will change if all of a sudden we don't have some small level of dependable support for some of the more mundane activities that are very hard to cover from an aggregate of administrative costs off a number of grants." Others just bemoaned the amount of work it takes to support organizations and the cost of that time to conservation. "Sustaining the infrastructure that we have and getting the other more diversified funding support has been a real struggle. It's all about relationships and the time it takes to build those and secure those. It's a huge amount of work and it takes me away from conservation work."

In conclusion, the PWC investments in building organizational capacity throughout California, and particularly in the Sierra, Desert and North Coast regions, are a significant legacy if they are sustained. The stories of organizational and individual transformation relayed to us by grantee respondents were heartening, even to fairly cynical evaluators. We close with a fairly long but not atypical response to a standard question we asked -- in this case to a representative of the Friends of the Inyo -- what would have happened without PWC? In his words, "Without PWC funding, Friends of the Inyo would have stayed a one- maybe two-person organization, stayed very small, stayed overworked, not built ourselves on a track to be a sustainable organization with increasing unrestricted funding because we would not have been able to leverage capacity building funds."

He continued, "And if we didn't have these dependable groups on the ground caring for these places every day we wouldn't have a huge wilderness bill going through Congress right now. And we wouldn't have water in the lower Owens Valley. We wouldn't have 15,000 hours of citizen stewardship on books. We wouldn't have a culture of citizen stewardship in the Eastern Sierra. We now have community groups in all communities up and down [Highway] 395 copying our model to care for the lands in their backyards. … Now there are professional, sustainable organizations that people know, that have been around for at least 5 and 6 years now that they see again and again and again. And we're not going away. And that level of acceptance we would never have gotten unless there was the dedicated support to build these organizations like PWC has done."

# - 7 -

# CHANGING PUBLIC POLICIES THAT AFFECT CALIFORNIA WILDLANDS

***To what extent did PWC secure public policy changes that increased wilderness and wildlands protection?***

A significant amount of grantmaking under the Preserving Wild California program aimed at influencing public policy. PWC grantees worked to affect federal, state, county and municipal policies to set aside wilderness areas, create funding for conservation purposes, and influence the pattern of development that affects conservation and wildlands. They achieved significant success in federal wilderness designations and laudable work in several areas of conservation finance and public land management. Efforts to turn back anti-conservation policy initiatives were also remarkably successful, with PWC contributing to campaign efforts against these initiatives at both state and federal levels. In addition, the program moved some policies forward so that they are more likely to be passed in the future.

> *"Last year, in a Republican-controlled Congress, we had three live wilderness bills … All of the major NGOs and lobbyists on the issue were funded by RLFF."*
>
> *"This was a juggernaut compared to other states. It was larger and better funded … and PWC was the powerhouse behind much of the local organizing."*

Policy formation is a long and chaotic process that requires a multi-strategy and opportunistic approach that was well-matched to the overall PWC grantmaking style. PWC grantees in Washington and Sacramento built relationships with potential sponsors and their staffs, coordinated media campaigns and public hearings, worked with NGOs and agencies, found ways to exert pressure on resistant legislators, and helped facilitate negotiations between key legislators. Simultaneously, PWC-funded groups carried out grassroots organizing and outreach to local Boards of Supervisors and other opinion leaders, worked to understand and negotiate specific concerns with proposed bills and connected with newspapers and electronic media to create messages supporting wilderness and pro-conservation measures. Multiple grantees worked on different portions of campaigns, yet operated in most cases in a fairly well-coordinated fashion, in part organized and guided by RLFF consultants' strategic insights and connections.

In this section of the report, we review the policy activities funded by PWC and the outcomes they achieved, while recognizing that PWC's investments were at times a small portion of broader campaigns. RLFF and its consultants also were involved in negotiating and strategizing policy changes, and it is challenging to determine whether their efforts should be ascribed to the PWC program or not. Nevertheless, in the first section of this chapter, we list 36 specific areas[1]

[1] Appendix A contains a longer review and status report of the 36 policy initiatives that we identified as PWC-influenced. The list of 36 items was derived from a review of the grants database, grantmaking documents, interviews and feedback from RLFF staff. We make no claim that this list represents all of PWC's policy activities. However, it should represent a moderately complete cross-section to get a picture of PWC impact.

of federal, state and local policy that appear to have been influenced – at least somewhat -- by PWC-funded activities. Of these, 29 were resolved in a pro-conservation direction – a remarkable 81% success record. According to interviewees, PWC played a key role in many of these battles, and we provide longer discussions of the campaigns to secure new federal wilderness designations and the campaign to protect the Sierra Nevada Framework because a range of respondents identified the outcomes of these campaigns as major accomplishments of the program.

## *A Wide Ranging Set of Policy Accomplishments*

*7.1 Through the PWC program, RLFF achieved considerable success in its policy initiatives by funding a wide range of activities aimed at increasing protection. Program administrators recognized that wildlands protection is affected by many different types of public policies produced and implemented by multiple levels of government.*

The 2004 Strategy Book identified a series of federal and state policy objectives, and policy work received the second largest segment of PWC funding behind acquisitions. More than $26 million were spent on policy initiatives, including constituency building. Priority strategies were: permanent protection through new federal wilderness and wild and scenic river designations; new federal funding for wildlands protection; and efforts to protect the integrity of existing environmental laws. At the state level, priority items were: permanence legislation to protect existing state lands from being used for non-conservation purposes; wilderness designation for state-owned wildlands; state wild and scenic river protection; new sources of funding for state land management; and ways to protect private lands through land use planning in rural counties.

Reviewing the six years of grantmaking, PWC funded a significant set of activities aimed at federal wilderness designation with several major achievements, wild and scenic rivers received federal protection in the North Coast, Desert and South Coast, and state protection in the Cache Creek area, national forest roadless areas were protected and the future of Fort Hunter Liggett in the Big Sur region was assured, and state conservation and park lands received some additional protections, in part through the creation and organization of the Sierra Nevada Conservancy. It is less clear that PWC produced a significant amount of wilderness designated at the state level, and some of their state policy initiatives were not resolved.

Tables 7.1-7.3 summarize material from Appendix A and provide a box score of wildlands protection-oriented policy measures influenced by PWC activities. Passage of the North Coast, Riverside County and Eastern Sierra wilderness bills were major achievements and these are discussed separately below. Other important outcomes are:

- **<u>Fort Hunter Liggett.</u>** RLFF staff and PWC grantees helped to determine the likely future of this 165,000 acre Army Reserve training post in the Big Sur region in Monterey County (Figure 7.1). Bordered by the Los Padres National Forest and containing the headwaters of the Nacimiento River, Fort Hunter Liggett (FHL) was listed as a priority


***Figure 7.1: Location of Fort Hunter Liggett in the Central Coast***

area for PWC protection in the Central Coast, and was one of the few significant program activities undertaken in the Central Coast region. This mode of protection was subtle, in that it simply identifies which federal agency has rights to the property should it be designated as surplus in the future. PWC funded Doug Steakley to photograph the natural, scenic, recreational and cultural resources of FHL to ensure that “We have the images we need to educate the public and decision makers about the need to permanently protect this magnificent property.” The Ventana Wilderness Alliance also was given a grant in part to enable them to participate in the FHL planning process to advocate for transferring the base to conservation ownership. VWA’s vision included creation of a Big Sur National Forest that would include the base and portions of the Hearst Ranch.

RLFF consultants helped to negotiate Senate report language through Senator Feinstein’s and Representative Sam Farr’s staffs, dealing with arguments over whether the National Park Service or the USDA Forest Service should be targeted to receive the property. "This is all federal property," the congressman said. "This is not a land grab. This is about consolidation and coordination between federal agencies. It's what the locals would like. They would prefer to have it go to the Forest Service, because they can continue to hunt." Ultimately, language was included in a military appropriations bill that grants a right of first refusal to negotiate over disposal of FHL lands to the Forest Service, should it be determined through the Base Closure process to be in excess of military needs.

**_Table 7.1: Wilderness designation_**

| *Policy (See Appendix A for description, role of PWC and status)* | *Outcome* |
|---|---|
| California Wild Heritage Act (Solis/Boxer bill) | 0 |
| Northern California Coastal Wild Heritage Wilderness Act (Thompson bill) | ✓✓ |
| California Desert and Mountain Heritage Act (Bono bill) | ✓✓ |
| Eastern Sierra and Northern San Gabriel Wild Heritage Act (McKeon bill) | ✓✓ |
| Sequoia-Kings Canyon National Park Wilderness Act (Costa bill) | ✓✓ |
| Designation of a portion of Limekiln State Park as wilderness (AB2945) | ✓✓ |

KEY: ✓✓ = Enacted or protected; ✓= Major progress; 0 = Remains unresolved

**_Table 7.2: River protection_**

| *Policy (See Appendix A for description, role of PWC and status)* | *Outcome* |
|---|---|
| Black Butte River (21 miles) -- Northern California Coastal Wild Heritage Wilderness Act (Thompson bill) | ✓✓ |
| North Fork of San Jacinto, Bautista Creek and Palm Canyon (31 miles) - California Desert and Mountain Heritage Act (Bono bill) | ✓✓ |
| Amargosa (24 miles) - Eastern Sierra and Northern San Gabriel Wild Heritage Act (McKeon bill) | ✓✓ |
| Actions to Designate Mokolumne, Clavey, Tuolumne and Arroyo Secoa Rivers as Wild and Scenic | 0 |
| San Joaquin River Restoration Settlement Act | ✓✓ |
| Nonbinding agreement on Klamath River dam removal | ✓ |
| Cache Creek Wild and Scenic River (31 miles) (AB 1328) | ✓✓ |

KEY: ✓✓ = Enacted or protected; ✓= Major progress; 0 = Remains unresolved

*Table 7.3: Other public lands protection*

| *Policy (See Appendix A for description, role of PWC and status)* | *Outcome* |
|---|---|
| Fort Hunter Liggett – Right of First Refusal to USFS | ✓✓ |
| Sacramento River Bend National Recreation Area | 0 |
| National Landscape Conservation System | ✓✓ |
| Prohibition of road construction in state parks (AB 1457) | 0 |
| Prohibition of disposition of state conservation lands (SB 1701) | ✓✓ |
| California Roadless Rule | ✓✓ |
| State wilderness areas management guidelines (AB2945) | ✓✓ |
| CA Fish & Game Code Change/CEQA Fee Increases (SB 1535) | ✓✓ |
| DPR authorization to acquire land subject to easement (SB 421) | 0 |
| Sierra Nevada Conservancy (AB 2600) | ✓✓ |

KEY: ✓✓ = Enacted or protected; ✓= Major progress; 0 = Remains unresolved

- **Cache Creek Wild and Scenic River.** PWC-funded activities in Yolo and Lake Counties resulted in designation of 31 miles of Cache Creek as a state wild and scenic river. A tributary of the Sacramento River, Cache Creek faced increasing pressure for dams and water diversions, and was designated by PWC in its Strategy Book as a special opportunity area. The first efforts to get the creek designated as a wild and scenic river came as part of the work on the North Coast federal wilderness bill, including work by CWHC (with Friends of the River as fiscal sponsor) and funded by PWC. When Cache Creek was taken out of the federal bill, attention shifted to designation as a state wild and scenic river. The North Coast organizer hired by CWHC helped to secure a Yolo County Board of Supervisors vote (4 to 1 in support) endorsing the Cache Creek designation.

  PWC staff, grantees and consultants led a campaign to mobilize public support and lobby key California legislators in support of the designation. These efforts included activities by Friends of the River, strategy and outreach work by the Conservation Strategy Group and RLFF staff, and communications work by PWC consultant Resource Media. The campaign included float trips and a media strategy aimed at local and state papers which generated op-eds from non-traditional supporters. Supportive editorials were written in 3 major newspapers. Endorsements were secured from Yolo and Lake County Supervisors and Davis and West Sacramento City Councils, as well as from 34 businesses, 74 conservation groups, and 54 scientists and university professors. Key legislators, committee members, and the Governor were also lobbied on behalf of the designation. Strong public support eventually overcame opposition from agricultural interests and water districts in Yolo and Lake Counties. California Assembly Bill 1328, designating Cache Creek as a state wild and scenic river, was signed into law on October 6, 2005.

**_Table 7.4: Conservation financing policy measures_**

| *Policy (See Appendix A for description, role of PWC and status)* | *Outcome* |
|---|---|
| Proposition 84 – Clean Water, Parks and Coastal Protection Act – and its implementation | ✓✓ |
| Sportfishing license revenues (AB 7) | ✓✓ |
| Orange County Renewed Measure M | ✓✓ |
| TransNet -- San Diego County sales tax for transportation | ✓✓ |

KEY: ✓✓ = Enacted or protected; ✓= Major progress; 0 = Remains unresolved

### *Increased Conservation Funding*

*7.2 PWC-funded activities helped to increase the flow of funding to California conservation in general and to support specific acquisitions.*

Statewide policy objectives identified the importance of a secured source of conservation funding, including federal appropriations, state bond initiatives and other sources of revenue for managing conservation lands. As the political context for conservation became more challenging and other policy priorities became more revenue-demanding, securing alternative sources of funding became even more important. As one respondent noted, “There was little in the way of federal dollars to work with. Appropriations from the Land and Water Conservation Fund were at their lowest levels in history. Every dollar needed to go further.”

PWC grantees and consultants worked on a number of revenue-generating activities. This included some work on lobbying to secure LWCF funds to support specific acquisition projects, as well as a small amount of funded work supporting those seeking tax incentives for conservation through the Federal Farm Bill. More significant PWC-funded work aimed at securing state-level conservation funds through bond initiatives, and county level sales tax ballot initiatives. Table 7.4 summarizes material from Appendix A and provides a box score of funding-oriented policy measures influenced by PWC activities. These include:

- **Proposition 84.** PWC invested in early research work ultimately leading to the passage and implementation of Proposition 84, a $5.4 billion initiative on the November 2006 ballot, which provides funding for all of the major state natural resource protection and water programs. The Proposition 84 campaign was supported and funded by a variety of conservation groups and individuals. PWC funded the Conservation Strategy Group (CSG) to analyze conservation finance options, negotiate and draft bond amendments, and reach out to potential supporters, legislators and the Schwarzenegger Administration, who ultimately supported the measure as did a broad coalition of more than 700 environmental groups, water districts, elected officials, local governments, and civic and religious organizations. RLG staffer Michael Mantell was the Campaign Chairman for the proposition, and more than a third of the Proposition 84 Executive Committee members were PWC grantees. The measure passed with 53.8% of the vote. Following passage of the measure, CSG and other grantees worked to influence its implementation to ensure that a fair share of the funds went to conservation.

- **<u>San Diego TransNet Sales Tax</u>.** PWC was also involved in several measures to raise sales taxes with portions of the revenues earmarked for conservation purposes. One interviewee noted the significance of this source of funding for local government conservation. "Local governments can't raise money because of ballot initiatives that have prevented this. They can't raise property tax, so they must raise sales tax." In San Diego County, PWC supported the Endangered Habitats League (EHL) to promote the reauthorization of the county bond measures that would devote funding for conservation. Proposition A on the Nov. 2, 2004 ballot would extend for 40 years a half-percent sales tax approved in 1987 and due to expire in 2008. The $14 billion in projected revenues were earmarked for traffic congestion relief projects along every major corridor in the county, bicycle and pedestrian projects, and the continuation of subsidized transit passes for seniors, youth and disabled passengers. It contained incentives to encourage "smart growth" patterns of regional development in addition to investments in public transit. Environmental groups were split on whether to support the renewal or not, with Sierra Club and the Center for Biological Diversity opposed.

  EHL worked with the San Diego Dialogue to organize an informal coalition of more than 35 civic organizations in support of the measure. In November 2004, the TransNet tax passed with 67% of votes cast, authorizing $880 million in public expenditures for the acquisition, management, restoration and monitoring of endangered habitats in the County over the next 40 years. As one grantee observed, "TransNet passed by 1/3 of 1%. Without our support, it would not have passed. … RLFF funded us in the early stages of that measure, because they understood that the payoff was so great."

## *Playing Defense*

*7.3 PWC grantees also helped to avoid "bad things" from happening by working against proposals to change policies in wildlands-unfriendly ways. Efforts to "hold the line" were arguably of equal importance to the future of California wildlands as more proactive policy initiatives.*

The PWC program was implemented in a time when wildlands policy faced an extremely challenging context. Republican leadership of major legislative committees, a President and administration who were hostile to land conservation activities and a simmering set of property rights concerns created an extremely challenging environment for advocates of wildlands protection. Battles over passage of the California Desert Protection Act also left residual hostility to new wilderness legislation. When set against this context, it is notable that any wildlands policy advances were achieved.

PWC leadership recognized this context and the Strategy Book highlighted the need to protect the integrity of federal lands by maintaining support for the Sierra Nevada Framework as well as state initiatives such as the Sierra Nevada Conservancy. Yet even they, according to one respondent, "didn't foresee how obstinate and hostile the Bush Administration and Congress would be to these issues. This required a major shift in emphasis from something we all are motivated by – creating good things – to blocking bad

***Table 7.5: Defensive policy measures - Federal***

| *Policy (See Appendix A for description, role of PWC and status)* | *Outcome* |
|---|---|
| RS2744 claims in the California Desert | ✓✓ |
| Protect integrity of Sierra Nevada Framework | ✓✓ |
| Conservation easement tax incentive | ✓✓ |
| Oceans State Options Act of 2005 - Offshore drilling language in the House Budget Reconciliation bill | ✓✓ |
| 2005 House Budget Reconciliation bill – Mining claims, Channel Island hunting | ✓✓ |

***Table 7.6: Defensive policy measures - State***

| *Policy (See Appendix A for description, role of PWC and status)* | *Outcome* |
|---|---|
| Rollback of the California Environmental Quality Act | ✓ |
| Takings compensation and limitations (Proposition 90) | ✓✓ |
| Takings and eminent domain limitations (Propositions 98 and 99) | ✓✓ |

***Table 7.7: Defensive policy measures - County***

| *Policy (See Appendix A for description, role of PWC and status)* | *Outcome* |
|---|---|
| Napa County Measure A – property rights | ✓✓ |

KEY: ✓✓ = Enacted or protected; ✓= Major progress; 0 = Remains unresolved

things. … Looking back, I realize how much creative energy and staff time was consumed [during 2003-2006] by defensive strategies to maintain the integrity of the existing structure. This is one of the hard-to-document impacts of the program, yet one that was very critical at this time."

Tables 7.5-7.7 summarize material from Appendix A and provide a box score of defensive policy measures influenced by PWC activities. These included actions to protect the California Environmental Quality Act, maintain offshore drilling moratoriums, and protect the integrity of the Sierra Nevada Framework for managing national forest lands [discussed more extensively below.] A set of property rights initiatives at the state and local level required efforts to hold the line, most notably by responding to several ballot measures. These included:

- **Propositions 90, 98 and 99.** PWC invested in early research which ultimately assisted several efforts to prevent passage of eminent domain or regulatory takings reforms that might restrict future conservation efforts. Eminent domain has attracted a great deal of public attention since the 2005 U.S. Supreme Court decision *Kelo v. City of New London*, in which the court upheld the government's broad exercise of authority. Since then, several states have proposed reform by statute or constitutional amendment. California property rights activists seeking regulatory takings reform are also raising pressure, especially because neighboring Oregon revised the state property takings law in 2004 to require compensation to landowners if local land use regulations reduce property values.

PWC's investments in this area focused on proposed state eminent domain and regulatory takings ballot measures, including Proposition 90, which appeared on the California ballot in November 2006 and was defeated, and Propositions 98 and 99, which appeared on the June 2008 ballot. Their strategy was to fund several organizations to conduct legal research, and disseminate its results through targeted outreach. The legal research was carried out by two very different organizations and focused on different aspects of the ballot measures' impacts. The analysis of Proposition 90 and the first analysis of Proposition 98 were conducted by the law firm Shute, Mihaly and Weinberger for the California League of Conservation Voters Education Fund (CLCVF). A second analysis of Proposition 98, which was a comparison between Propositions 98 and 99, was conducted by the California Center for Environmental Law and Policy (CCELP) at the University of California, Berkeley, and focused more on the economic effects of the measures.

CLCVF's analysis focused heavily on the threats of the initiatives to natural resources and environmentally significant lands. According to their analysis, the Initiative would have amended the California Constitution by adding a regulatory takings provision "that would allow property owners to sue to obtain compensation for, and/or to invalidate regulation that imposes costs on the owner, regardless of whether the regulated activity is a nuisance, a threat to public health or safety or harmful to the environment." Conservation concerns stemmed from potential interpretation of the Initiative to restrict regulations that protect at-risk environments (such as coastal areas, groundwater supplies, forests, farmland, ranchland, cultural and historic sites), smart growth regulations to promote transit oriented land uses, regulation of water rights, and potential regulation of greenhouse gas emissions or other regulations that could protect communities from climate change.

CCELP's analysis, a comparison between Propositions 98 and 99, considered natural resource impacts of the initiatives, but gave more attention to other economic concerns relating to the proposed legislation. According to this "independent" analysis, Proposition 99 was a more narrowly targeted reform that applied only to owner-occupied single-family residences, which are most commonly found in fully developed areas. Hence, Proposition 99 did not pose any significant risk to conservation lands. Both studies gave ammunition to opponents of broad eminent domain and takings legislation. Ultimately, CLCVF became a leader in the campaign to defeat Proposition 98, along with the League of California Cities.

Beyond supporting research, PWC's grants included funding for dissemination of results to key target audiences. For example, a 2007 PWC contract to Wilson-Miller Communications, Inc. supported outreach on the eminent domain issues to nontraditional constituencies, including Republicans, business leaders, and agricultural community organizations. CCELP was asked to speak to the California Legislature to present an "objective opinion" about the initiatives' impact. By linking legal research with outreach, PWC was able to maximize the impact of the research. "It's because of having done the research and published the paper that I was asked to testify as an expert before the California Legislature," said one respondent. On the flip side, "It is because of some of the outreach we've done…that gave the document a broader readership and more serious treatment than had it been the case that it had just fallen out of the sky."

Ultimately, Proposition 99 passed with 62.5% of the vote, while Proposition 98 was defeated. Respondents expected that this result will lessen the threat of eminent domain reform to conservation lands. "My expectation is that with the defeat of Prop. 98, and the approval of Prop. 99, that this issue as a political and policy issue is going to fade away, at least for the foreseeable future," a respondent explained.

## *Federal Wilderness Designations – A Strategic Success*

*7.4 Campaigns to secure federal wilderness designations were highly successful and illustrate the strategic, deal-making role played by RLFF and PWC-supported grantees in a politically challenging time. More than a million acres of new Congressionally-designated wilderness areas were secured during the period in which the PWC program was active.*

Many respondents credit RLFF and the PWC program with helping to move wilderness policy from a partisan, all-or-nothing stance that was unlikely to secure legislative achievements to a more strategic and focused set of efforts with significant outcomes: passage of the North Coast (Thompson), Riverside County (Bono-Mack) and Eastern Sierra (McKeon) bills. As of early 2009, RLFF staff were also reporting momentum in working on draft wilderness bills with Representatives Darrell Issa and Sam Farr, among others.

With inclusion of the Riverside County and Eastern Sierra bills in the Omnibus Public Lands Management Act signed by President Barack Obama on March 30, 2009, California gained over a million acres of designated wilderness during the time in which the PWC program was active, and RLFF can take partial credit for that success. As one respondent noted, "Last year, in a Republican-controlled Congress, we had three live wilderness bills, two of which were sponsored by Republican House members, one of which became law under a hostile Republican committee chairmanship. This year, the Riverside County bill is flying through, and the McKeon/Hoover bill, which was just 40,000 acres last year contains 470,000 acres this year. … All of the major NGOs and lobbyists on the issue were funded by RLFF." Another compared the California effort to those in other states, "This was a juggernaut compared to other states. It was larger and better funded. There is no other campaign that is of its scale, and PWC was certainly the powerhouse behind much of the local organizing." According to a third, "At the end of the day, the California effort has been one of the most high functioning efforts in the country compared to other wilderness campaigns."


*Figure 7.2: California wilderness bills influenced by PWC grant activity*

While establishing causality is always challenging, it is clear that there was a major shift in the approach to wilderness designation campaigns that occurred during the period of time that PWC was active. The battle over the California Desert Protection Act in the early 1990s left all parties exhausted, with significant hard feelings among a variety of interests on both sides of the wilderness equation. As one respondent described, "We just limped across the finish line, just before the '94 elections, where the Republicans took the majority. Then there was no legislative activity for the next six years."

A coalition of wilderness activists tried to tee up a new statewide wilderness bill, first inventorying 7 million acres of land they collectively wanted included in a bill that they hoped Senator Barbara Boxer would sponsor. That was ultimately negotiated down to 2.5 million acres and introduced by Senator Boxer as the proposed California Wild Heritage Act. This bill was first introduced in 2002, and has been introduced into every subsequent session of Congress. The inventories also led to the formation in 2000 of the California Wild Heritage Campaign (CWHC), a collaborative effort led by Friends of the River (FOR), the Sierra Club, the California Wilderness Coalition (CWC), and The Wilderness Society with 200 other local member groups.

Unfortunately for wilderness activists in California, their huge statewide bill was produced at the same time that the 2002 Congressional elections generated a Republican majority in control of both houses of Congress along with a Republican president. California Congressman Richard Pombo took control of the House Resources Committee, which has primary jurisdiction over wilderness. As Chairman of the Committee with a considerable history opposing environmental bills, he effectively shut down the possibilities for wilderness bills to advance. Wilderness was seen as a partisan issue, and wilderness activists were viewed as "extremely liberal Democrats," according to one respondent. Wilderness activists were stuck.

The PWC program came into being at this seemingly inopportune time yet outlined an agenda that called for wilderness designation for 750,000 to 1.5 million acres of unprotected wildlands. The fact that RLFF was successful came from their efforts to shift the nature of the wilderness campaigns in five critical ways:

- Shifting from a statewide bill to district-by-district bills.
- Decentralizing while enhancing the capacity of the California wilderness movement.
- Developing complex strategic networks of groups organized both in California and in Washington DC.
- Reducing the perceived partisanship of the wilderness debate by hiring Republican lobbyists and working with Republican members of Congress.
- Playing a key strategic, intermediary role to help make deals happen.

## Statewide to District-Level Bills

The shift from a statewide bill to a district-by-district approach was probably the only way to get legislation passed, but it was hotly debated within the California conservation community. As one respondent noted, “The 2.5 million acre Boxer bill involved a lot of districts where House members were vehemently opposed to wilderness. It was a real lightning rod. Activists wanted to do the statewide bill. There were so many little potential conflicts that needed to be resolved, but they were stubbornly hanging on to it. We lost a lot of activists to go from 7 million to 2.5 million acres. In the ‘hopeless’ districts, folks were really disappointed and angry.” Another interviewee commented, “The national environmental groups are afraid to move bills during a Republican administration. They are afraid that if you have to compromise too much to pass it, it’s better to wait for Democratic control.”

The shift to a targeted, more surgical district-level approach matched the pragmatic, shorter-term outcomes approach of the PWC program and by all accounts, was a strategy embraced by RLFF in its grantmaking. According to one staff respondent, “It was clear that the Boxer bill wasn’t going to go anywhere because there was so much House Republican hostility to Boxer. So we shifted to a regional strategy.” It was also the case that Representative Farr’s (D-CA-17) Big Sur Wilderness and Conservation Act of 2002, which designated 56,000 acres, had recently passed under this approach, and that a message from Chairman Pombo to ranking minority member Nick Rahall had indicated that any potential wilderness bill had to be single-district legislation. And as one of our respondents commented, “At the end of the day, that’s how you do it in Congress. You ask, where is the member? Where are the Board of Supervisors? Who can you most move?”

Working district-by-district also made the concerns of affected groups more clearly identifiable so that proponents of wilderness designations could work to deal with these concerns. For example, in Riverside County, primary opposition to the Bono bill centered on fire safety issues. Before the legislation was introduced, the Congresswoman received a letter from a coalition of Riverside County residents asking her to oppose the designation of certain parcels due to fire issues, including the fear that wilderness designation would result in less funding for fuels management in the designated areas. Rep. Bono-Mack was able to mitigate this fear by developing statutory language for her reintroduced version of the bill guaranteeing no reduction of funds. This development persuaded one of the chief opposition groups (the Fire Safe Council) to vote “not to oppose” the bill. The USDA-Forest Service, however, continued to oppose significant portions of the bill due to fire protection issues.

For the Eastern Sierra bill, Representative Buck McKeon was very concerned about the interests of ORV users, in particular the availability of lands for snowmobiling, and was pushed by Representative Pombo both to release lands from wilderness study status and include language to prescribe new lands for snowmobile use. PWC consultant Scott Dacey worked with McKeon’s staff to develop an understanding of the political pitfalls of such a designation, in particular, the opposition of Senator Barbara Boxer to these provisions, which would stymie action on the bill in the Senate.

## Decentralized Campaign Organization

The shift from a statewide to district-level campaigns was matched in part by a strategic shift in the organization of wilderness advocates, as funded by PWC. In its initial wilderness advocacy grantmaking, PWC provided substantial funds to support the California Wild Heritage Campaign directly (with Friends of the River acting as fiscal sponsor), and indirectly through grants and contracts to California Wilderness Coalition, the Campaign for America's Wilderness (CAW), and others. These early grants built CWHC capacity to the point where a central staff of 12 full time employees functioned to organize the campaign. CWHC and its partner groups did a lot of grassroots organizing, media work, and the like.

Over time, though, RLFF became concerned that the centralized CWHC staff in Sacramento was "eating up a lot of money but not putting out a lot of work," according to one respondent. "RLFF became impatient with CWHC. They had a limited amount of time and saw the money was going to run out. The Campaign didn't want to carry out triage and write out any areas. RLFF saw them as getting in the way." Some argued that CWHC leadership was not as effective as it could have been, while others saw an underlying tension between a broad-based coalition comprised of lots of local agendas with a political reality that limited broad-scale action. On the other hand, some in the coalition felt that the role that RLFF was playing was inappropriate. "It was inappropriate for a funder to be in on our conference calls. There was lots of resentment and screaming, and attempts to hide things from RLFF," said one respondent.

At bottom, though, the shift from a centralized campaign to a dispersed one matched the strategic shift to district-by-district campaigns and consolidated RLFF's influence over the direction of their grantees. In 2006, following more than a year of discussions about performance on PWC grants and an organizational assessment funded by RLFF, CWHC was dramatically reorganized. In place of centralized staff, the CWHC now has a statewide campaign coordinating committee composed of representatives from Friends of the River, the California Wilderness Coalition, the Sierra Club, and The Wilderness Society. For some involved in the shift, "we were worried about the power vacuum that might result from CWHC being disbanded, and the balkanization of the state. … But the Riverside campaign was done after CWHC was disbanded, and it has been a very successful team. They ended up working very well together."

While PWC funded a number of activities designed to advance wilderness protection in the Eastern Sierra (as described below), some respondents suggested that the dynamics surrounding the McKeon bill were more challenging in part because RLFF and its consultants played a different role, leaving the lead organizing role to others in The Wilderness Society and the Sierra Club. In one observer's view, "There are personality conflicts involved with Sierra Club and TWS staff. Individuals who are very possessive and controlling. [They] resented RLFF's efforts. [They] resented Scott Dacey and others talking to Congressman McKeon's staff. Basically, they really tried to resist RLFF all the way through." As a result, "RLFF has been much less involved, and more skittish in not wanting to piss off" this individual. In this respondent's view, if a more deliberate and open process had unfolded targeted on McKeon's district, then progress "would have been more like that with the Riverside County bill."

## Strategic Networks of Organizations

RLFF continued to fund almost all of the wilderness advocacy organizations and by providing coordination, incentives and capacity to various groups helped build what one grantee called, “a seamless team” of organizations working at the grassroots, state and D.C. levels. By investing in groups like CWC, CWHC and CAW, along with lobbyists in Washington, D.C., RLFF effectively built a multilayered strategic coalition that brought together scientific information, evidence of local support, and a good sense of political needs and leverage points in order to transform activity in key areas. In California, PWC grantees worked to build local support within targeted congressional districts. These included:

- **North Coast (CA-1).** From 2004 until the North Coast bill’s passage in 2006, PWC funded a CWHC organizer position dedicated to building local support for wilderness designation in Representative Thompson’s district. This individual succeeded in securing endorsements from Mendocino and Napa Counties and numerous letters of support from non-traditional wilderness supporters, Del Norte county residents and elected officials, and mountain bikers in the North Coast region. In an attempt to neutralize opposition from the International Mountain Biking Association, he also organized an event to draw attention to a trail that had been specifically left out of the Thompson legislation for mountain biker use. In coordination with CAW, CWHC also led a successful campaign culminating in Governor Schwarzenegger’s February 2005 endorsement of the bill.

- **Eastern Sierra (CA-25).** PWC grantees also laid the groundwork for Congressional support of wilderness designation legislation for the Eastern Sierra. In order to convince Rep. Buck McKeon that strong support for wilderness existed in this region, CWHC successfully campaigned for endorsements by both Mono and Inyo county governments, as well as by numerous business owners and influential community leaders. To win these endorsements, CWHC organized community meetings, held one-on-one discussions, developed and distributed outreach materials, and organized a hiking club. CWC has similarly worked to build local support in San Bernardino County in the southern-most reaches of Rep. McKeon’s district, including building relationships with local officials and community leaders, developing and disseminating a well-received desert guide, generating letters of support, presenting at area events and leading field trips for decision makers. CWHC also worked with Randle Communications, a PWC contractor, to generate a barrage of thank you letters in response to Rep. McKeon’s announced commitment to introducing the bill in 2006.

- **Riverside County (CA-45).** PWC funded consultants Brian Nestande and Scott Dacey to research and implement a campaign working with wilderness activists. Initially, some of the activists were reluctant to engage even when Rep. Bono-Mack indicated her interest in authoring a wilderness bill for her district. With PWC funding to support the efforts of the CWHC, Friends of the River hired a field coordinator dedicated to Riverside County and established an office in Palm Springs. This individual was charged with coordinating the activities of the various organizations working on wilderness issues in the county. This individual generated several hundred letters of support directed at the Republican congresswoman, and conducted outreach to local community leaders.

PWC grantees also communicated with Forest Service and BLM officials to identify specific agency concerns and how to resolve them. For example, CWC and CWHC staff had relationships with local and regional Forest Service offices that enabled them to discuss and resolve a lot of the on-the-ground issues associated with land designation. CAW's California Coordinator worked with Forest Service staff in 2005 to address specific concerns about the North Coast legislation, because they feared that Rep. Pombo would use the agency's concerns as an excuse to end further consideration of the bill. This individual also represented CWHC in a closed-door negotiation that took place between the bill's sponsors, Senate staff, and the Forest Service. The Forest Service was ultimately persuaded to support the bill. According to several respondents, one of the major reasons that the campaign was successful was its access to on-the-ground knowledge that was rapidly fed into negotiations on Capitol Hill.

DC-based outreach to potential Congressional sponsors and their staffs and negotiation with key Congressional leaders like Congressman Pombo and Senator Feinstein were also critical components of the strategic network funded by PWC. Grantees actively worked with key members of Congress to solicit support and mitigate concerns. On the North Coast bill, CAW staff members built relationships with key members of Congress and their staffs and worked with them to adjust the bill as necessary to overcome opposition. RLG staffer Michael Mantell and a PWC grantee worked particularly closely with Senator Feinstein and her staff to build enthusiasm for the bill (Senator Boxer was initially its primary advocate in the Senate). Senator Feinstein became a co-sponsor of the bill in 2004 and her support was critical to the success of the legislation, since she provided the final leverage over other legislation Rep. Pombo wanted to clear the Senate.

## Working with Republicans

RLFF also cut through the level of partisanship associated with wilderness in general -- and California wilderness in particular -- by funding Republican lobbyists and undertaking outreach to potential Republican supporters. For example, Brian Nestande, former campaign manager and chief of staff for Congresswoman Mary Bono was hired under contract with PWC to promote the legislation. He built relationships with local elected officials, newspaper editors, tribes, water districts, and developers. In the interest of building support with developers, Nestande helped to form a smart growth advocacy organization with the backing of the Building Industry Association. This work eventually garnered a letter of support for wilderness designation from this industry group. In order to head off potential opposition from ORV users, Nestande asked a Riverside County supervisor to appoint him to the County ORV commission in January of 2007. He was subsequently appointed and used this position to develop relationships and communicate with the ORV user community. Through these relationships Nestande has been able to convey the concerns of local stakeholders back to Rep. Bono-Mack's office where some have been addressed through changes to the legislation. He has also worked with Rep. Bono-Mack's staff to understand and address the fire safety-related concerns of Forest Service personnel.

In one activist's words, "RLFF played a major, major role [on the Riverside bill.] They got us a meeting with Congresswoman Bono's legislative director down in Palm Springs. A very nice person. The first Republican I'd ever met who admitted going to a Snoop Dogg concert.

RLFF paid for us to helicopter around to the various areas and look at them with Ed [Hastey]. They paid our salaries, hired Scott Dacey and Brian Nestande, a Republican who is very well connected and very effective. He helped make sure we got a bill. RLFF helped established the very solid relationships with her staff that exists today. We speak with her staff almost on a daily basis."

One of the more transformative elements of the campaign appears to have come from hiring Scott Dacey of PACE/Capstone, who had close relationships with House Resources Committee Chairman Pombo, was a close friend of Congresswoman Mary Bono, and a friend and colleague of Congressman Buck McKeon. It was a "brilliant move" to hire Dacey, said one respondent.

Dacey served a role as a trusted intermediary in two directions. First, to give the wilderness advocates some idea of what is doable. In his view, Chairman Pombo was not necessarily opposed to wilderness bills, as long as they designated land that "nobody had touched for decades." If it is actively used by OHVers or others, then that is not wilderness. In addition, Pombo felt that if you designate wilderness, you should also release other lands that are treated as wilderness but are not.

On the other hand, Dacey served as an "honest broker" with Pombo. According to one respondent, "Pombo never thought there were honest brokers representing the interests of the wilderness folks. They were left wing Democrats, and that's not where he was." Dacey had access to Pombo and his staff and could provide them with information that was developed by other PWC grantees back in California. If Dacey – or someone similar – had not been involved in the campaigns, it would have been difficult to succeed while Pombo was head of the Resources Committee. According to one respondent, "You needed someone who had access to Pombo on a regular basis, keeping him focused on this stuff. Otherwise, Pombo wouldn't have had the incentive to pay attention."

During the twenty-months of work involved in moving the North Coast wilderness bill forward, Dacey worked extensively to provide strategic advice to PWC-funded organizations while building stronger relationships with Representative Pombo and his staff. At one point, he was able to identify and coordinate resolution of a misunderstanding between Thompson and Pombo that threatened to derail the progress of the bill. He also set up meetings with Republican wilderness supporters in Representative Pombo's district and held "moot-court" type proceedings in preparation for these meetings. Dacey was also a trusted voice to Pombo, assuring him that RLFF was not working in the Representative's district to drum up opposition to his Endangered Species Act revisions.

Doing the hard work to demonstrate Republican support for wilderness bills was equally important, because otherwise few elected officials would believe that their constituents would support their actions. For example, CAW and CWC did outreach to nontraditional groups. In lobbying on the Thompson bill, "We built relationships with a horsepacker, a mining company president, a logger and a county supervisor, all of whom were Republicans. We brought them back to DC, and had them meet with Pombo's staff who could not believe it. They were shocked that these kinds of people were supporting wilderness. That helped set the stage for the willingness of staff to consider a wilderness bill." CAW and CWHC worked to keep negative comments from Pombo out of the press and to ensure that campaign representatives always spoke positively about Pombo in public.

RLFF also paid for polling in Republican districts that, according to one respondent, was absolutely critical. "These guys aren't going to do polling on wilderness issues on their own. It's always helpful to go into these guys' offices and say 75 percent of Republicans in your district are supportive of wilderness. … And they picked the right people to do the polling. The pollster that does it has to be trusted by that member of Congress." A good illustration of this comes from the initial outreach to Congressman Buck McKeon to solicit his support for wilderness designation in his district. McKeon, who was not ideologically predisposed to wilderness, made it clear that his support of new designations in his district would be contingent on demonstration of strong local support. In response, PWC funded a poll in 2005 to demonstrate local support for the proposed designation. The pollster (Steve Kinney, a Southern California-based partner in Public Opinion Strategies, and former regional director of the Republican National Committee) had ties to Representative McKeon and was able to brief the Congressman's staff on the results. This polling data appears to have been instrumental in helping to bring about McKeon's introduction of the bill.

## Making Deals Happen

Legislation happens because deals get done, and this requires a lot of information, negotiation and hand-holding. "Congressional staff just simply don't have the time to go up and do what's necessary to construct these bills," said one interviewee. "Absent having RLFF and its cadre of professionals working on this stuff, the folks in the OHV community and bike riding community would be able to shut down any piece of wilderness. Because there would be no one from the other side who would call baloney on the statements those guys are making."

At the end of the day, RLFF through its PWC grantees and contractors were able to knit together enough information, momentum, and strategic advantage so that a deal was cut. For example, one observer described the end of the battles over the North Coast/Thompson wilderness bill when it was being held up in Congressman Pombo's committee. "They had put together the right bill, gotten Mike Thompson to push it, gotten Mendocino support. All the local support was lined up so that Feinstein and Boxer could sign on. Pombo had a bunch of bills moving through the Senate and we put a hold on them and said we're not moving those bills. He was ready to compromise. So we sat down with his staff, and he had a few face saving changes to make." They then consulted with PWC grantees and consultants who worked to help wilderness activists "understand that losing one percent and getting 99 percent was worth it."

Because of the nature of conservation issues and the messianic bent of many environmentalists, environmental policies may be some of the hardest issues on which to craft stable deals. RLFF and its consultants worked as intermediaries to identify options and negotiate deals. As one respondent suggested, "From a Senator's perspective, it is very difficult to deal with the environmental groups. Their hearts are in the right place, but they are incapable of cutting the deal if one of them disagrees. Unless you know someone has done the work – that the Boards are supportive – there is no reason to intervene in a controversial local matter unless there is local support.  RLG has been very good at identifying that support and rounding it up.  There's nobody else in California that is doing that.  What RLG brings to the table is someone who lays out the options on how to get there."  According to another, "No one else provides the complete service they do.  And have the reputation they have.  If Michael could tell me this was a good deal, I'd believe him.  He was going to bring in offense and private money to make it happen.  And he could control the environmentalists."

In the end, policies are negotiated based less on the validity of their substantive direction than on how various other political and substantive interests can be satisfied in making the trades associated with a deal.  In this case, besides making a pro-wilderness stance by Pombo possible through outreach to Republicans and district interests, the deal was cut by understanding Pombo's interests in securing a set of water agreements that were being held up in the Senate.  According to one respondent, "At the end of the day, the most critical thing was Pombo's feeling of certainty that he could get packages of things he wanted through the legislative process. It had a lot less to do with this bill being something that he wanted to get done.  Rather, this bill was part of the tools that he needed to achieve his overall goals."

While it is challenging to disaggregate the role of RLFF staff and PWC-funded grantees from those of many other players in the wilderness policy debates of the last six years, it appears likely that by occupying the center of the debates, bridging interests, forming strategic networks and alliances, and helping to midwife deals, PWC can claim considerable credit for the reality that deals did get done: additional wilderness was designated, and more is in the pipeline.  Indeed, some respondents felt that the most important effect of the momentum created by passage of the Thompson bill and the early momentum on the Bono and McKeon bills is that it changed lawmakers' perspectives to believe that wilderness could be a positive political issue.  In doing so, this change may have provided the platform for the more sizeable legislative accomplishments achieved in the Omnibus Public Lands bill.  Political compromises had been crafted which could then be acted upon when the Congress and administration changed in early 2009.

## *Coupling Short Term Wins with Strategies for Long Term Change*

*7.5 Short term wins matched with investments in long term change are needed for successful wildlands conservation. PWC investments in the Sierra Nevada Forest Protection Campaign helped maintain hard-fought gains captured in the 2001 Sierra Nevada Framework while building a long term community-based constituency for ecologically-sustainable forest management.*

Policy victories are only as resilient as the coalitions that underlie them.  If the base coalition is weak, victories in one time period can be rolled back or undercut as conditions change.  PWC activities in the Sierra Nevada suggest the power of simultaneous strategies to secure administrative and judicial gains while doing the hard work of building a broader-based, grounded constituency for more effective resource management.  PWC invested several million dollars in the Sierra Nevada Forest Protection Campaign (SNFPC), a broad-based coalition of environmental groups which eventually became Sierra Forest Legacy (SFL).  According to several respondents, SNFPC/SFL's opposition to Bush Administration changes in the Framework and their parallel efforts to build community capacity for fire safety and alternative wood products have been critically important to shifting forest management in the Sierra to a more ecologically-sustainable course.

While many of the Campaign's member groups had been working on Sierra Nevada issues for many years, SNFPC was formed in 1996 with "the primary goal of protecting and restoring Sierra Nevada national forests and to coordinate and focus the efforts of its member groups and maximize their effectiveness. The Sierra Nevada Forest Protection Campaign became a part of the California Wild Heritage Campaign in 1999, but in 2002 was reestablished as an independent coalition focused exclusively on Sierra Nevada national forest issues." It currently lists 98 member groups, including national and statewide groups like Sierra Club, The Wilderness Society and Friends of the River, as well as more localized land trusts, advocacy groups and political organizations. It takes the lead role in advocating for responsible management of the 11.5 million acres of national forest land in the Sierra Nevada.

RLFF's support of the SNFPC started early in the PWC program, with an overriding early focus on protecting what were perceived as hard-fought gains secured in a 2001 USDA-Forest Service Record of Decision and Final Environmental Impact Statement that created a planning framework for the 11 national forests in the 430-mile-long Sierra Nevada mountain range. Signed in the waning days of the Clinton Administration, the "Framework" was the result of roughly 14 years of planning, research and major battles. It included commitments to protection of 4.1 million acres of old growth, key core area protections for the California spotted owl and goshawk, protection of all trees greater than 20" diameter on 96% of the USFS lands, and a 300 foot stream buffer system with 460,000 acres of aquatic refuges. In one respondent's terms, "It was the most profound change the Forest Service has ever done in terms of who they think they are. The best decision they ever made at that scale anywhere."

Policy decisions are only as good as the science, legal arguments and politics underlying them, and undoubtedly part of the reason that the Framework was adopted came through the science-based advocacy adopted by the SNFPC, and the leadership of Clinton Administration officials. However, the interests that fought against the changes in prescriptions contained in the 2001 Framework were given a huge opportunity as the Bush Administration took office and a new Regional Forester was put into place. In December 2001, he announced a review of the Framework, which culminated in March 2003 with recommendations to eliminate ancient forest reserves and allow more intensive logging of trees larger than 20" in diameter for wildfire risk reduction. The argument made in subsequent legal battles was that it was valid to allow timber sales of large trees in order to pay for removal of smaller trees and brush to reduce the potential for wildfires. Ironically, the US Fish and Wildlife Service declined to list the California spotted owl as an endangered species in February 2003 based on the protections contained in the original Framework.

From the perspective of forest protection advocates, the change in political direction and its impact on the overarching framework achieved through years of work was "a stunning thing to witness and be part of," said one interviewee. "There was the tragedy of having Bush steal the election, and then see the Framework begin to get stripped away. It was depressing to realize that we're going to be in the trenches for four years – eight years as it turned out – and that's when RLFF came on the scene. … RLFF gave us the most profound thing: the ability to play the land management game at a very sophisticated broad level. Where we had the staff capabilities and the funding we needed to bring in outside consulting support if we needed it. They helped us build a very powerful strategic approach to our work that in some ways overwhelmed the Forest Service. … RLFF made it possible for us to participate in media communications, science advice. We could travel to meet with experts. Every single thing we did was done at a level that the Forest Service was not prepared for."

The overall campaign included work to stop specific timber sales while challenging the revision of the Framework. Conservation groups argued that the 2004 revision broke federal law by failing to protect habitat of the California spotted owl and two small carnivores, the Pacific fisher and American marten. They also claimed that it was adopted without adequate disclosure of its impact and with no attention to reasonable alternatives. The campaign was made possible by large PWC grants to Friends of the River Foundation, the fiscal sponsor of SNFPC/SFL – at least $3.2 million over 5 years by our count. "We could keep the staff lawyers, science and policy experts fully engaged at the policy level to stop the overall aggressive treatments, and then have the legal team build the legal arguments to defeat them and keep the resource damage to a minimum without vaporizing ourselves through overwork. … Understanding the modeling algorithms, having the time to read the research and their references, building trust with people, going out on the ground to research sites… takes huge amounts of time and effort. To be able to play at that level we were at takes resources. They saw and trusted our ability to use resources wisely."

What were the outcomes of these investments? Ultimately, it is hard to know since these are long running policy battles. However, the legal challenge of the revised Framework appears to have been successful. On May 14, 2008, the Ninth Circuit Court of Appeals effectively overturned the Framework revision and remanded the decision of the Forest Service back to the district court. The State of California filed an amicus brief in support of the environmentalists' position, and the court ruled that selling large trees to finance fire protection efforts without considering reasonable alternatives was not acceptable policy. The judges ordered a halt to three major logging projects in the Plumas National Forest until an environmental impact assessment was completed that conformed to the Clinton administration's 2001 Framework. Conservation groups believe that all logging projects approved under the 2004 framework will face significant reevaluation. Given the change in administration, it is likely that this court decision will significantly influence the course of forest management in the Sierra.

Just as important as this legal backstop has been PWC-funded work by Sierra Forest Legacy to lay out their vision of how rural communities and environmental groups can work together to allow management to go forward. As one respondent put it, "Environmental groups are masters of the word 'no.' But we've been struggling to lay out our vision for what "yes" is. Of what ecologically-sound resource management would be." PWC helped in this endeavor by funding a strategic planning process by SNFPC. RLFF consultants La Piana Associates helped with organizational development and Resources Media helped with media communications. As a result, the Sierra Nevada Forest Protection Campaign changed its name to Sierra Forest Legacy in 2007 to better reflect its expanded mission and vision of protecting Sierra Nevada forests and communities. "Sierra Campaign had a war tone and a short term feel to it, and we wanted to broaden our work," said one.

Critical to this mission has been a community forest program that involves developing alternative wood products and helping communities reduce their fire risk. SFL hired a Fire Protection Coordinator and has worked with a number of Sierra communities, including Grizzly Flats, Lake Wildwood, Volcanoville and Alpine Meadows, to help them become certified as Firewise USA Communities. They also partnered on a biomass heating project with the Lake Tahoe Unified School District when they needed to replace the South Tahoe High School's diesel boiler. SFL and the School District successfully wrote a $243,500 grant application for a USFS program to help in the installation of a biofuel boiler at the high school. Similarly, they have worked with Cedar Mill Eco-Farm, a greenhouse operating under the trade name Sierra Fresh Organics, based in an abandoned sawmill site in the small Sierra town of Pioneer. The project will use low-value forest thinning from the nearby community of West Point in Calaveras County to heat the greenhouse, ultimately converting low-value forest thinning into organic tomatoes and cucumbers.

By all accounts, this shift to a more proactive strategy was rocky at first. According to one respondent, "It was a huge step for us. When we walked into that world, the first comment was, 'You work for that environmental group. What the hell are you doing here?' Now the comment is, 'Thank God you're here.' A lot of sophisticated social work has to happen in those venues. And that takes training and expertise to handle the tension and convergence of the two programs [litigation/administrative process and community forestry]."

This individual viewed RLFF as unusual in that they were more willing to take risks than other funders. "RLFF had the trust and foresight to believe we could do it. … We were talking about touching some trees, and many funders wouldn't go there. But RLFF saw that this was an important thing to do and they believed in us and funded us. And it has been profoundly effective in enabling us to talk to nontraditional folks. And it hasn't been easy in terms of support without our own coalition. But it has been very successful, a real debate-changing experience for everybody. We've been able to bust through all that tension and ill-will that can be generated from people with opposing viewpoints."

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Change in attitudes and relationships at the local level may result in changes in the politics of wildlands conservation in local communities. If so, it may well create opportunities for more significant federal and state policy change in the future. Even without considering those changes, it is clear that the PWC program shifted the political balance point at all levels of government on a number of key wildlands issues. Wilderness designations, new sources of conservation funding, and shifts in public land management are all significant products of those changes. As Section 10 points out, not all areas of wildlands-relevant policy received attention by the program, including working lands, private lands and growth management policies, but these were largely taken off the table by the relatively "pure" definition of wildlands established at the start of the program.

# - 8 -

# BUILDING LONG TERM CONSTITUENCIES FOR WILDLANDS PROTECTION

***To what extent did PWC promote long-term political and constituency changes that make wildlands protection more likely in the future?***

PWC's achievements in its six years of grantmaking provide a solid foundation for future accomplishments. For example, passing the North Coast, Riverside and eastern Sierra wilderness bills makes wilderness more politically palatable in other regions. New funding streams provided by Proposition 84 and the Sierra Nevada Conservancy create incentives and opportunities for additional acquisitions. Having more capable conservation organizations also increases the likelihood of additional protection. In its 2004 Strategy Book, RLFF also identified the need to broaden the base of support for wildlands conservation in California, since traditional wilderness constituencies increasingly would be a smaller fraction of the California population. Hence one of the overarching goals of the program was to "build new constituencies that will sustain support for wildlands preservation over the next generation."

> *"The biggest lesson is that it takes time and it can't be done in isolation of other issues."*
>
> *"It has changed our organizational culture and awareness and outlook about how to engage other communities."*
>
> *"It's not just shooting an e-mail a few times. It's more about having a constancy and a presence and really building up a true and sustained network."*

The Strategy Book envisioned outreach to nontraditional groups such as business leaders, Republicans and anglers aimed at influencing specific policy battles, as well as work focused on influencing the attitudes, understanding and engagement of the region's growing Latino communities which "support conservation at higher rates than the general population," according to the Strategy Book. In particular, grantmaking was envisioned for Latino outreach work in the Central Valley and the South Coast, a direction that was restated and developed further in PWC strategy memos produced in mid-2006. One respondent highlighted the importance of this work: "In twenty to thirty years, Californians will be majority Latino. The leadership in the state is already shifting to be increasingly Latino. The current Assembly speaker is Latino, a former Assembly Speaker, the mayor of LA, is Latino. And these urban rivers run right through their districts. These connections will become increasingly politically important over the next few years."

PWC invested significant funding and time in a variety of constituency-building activities. Some of the work involved campaign-directed outreach aimed at recruiting nontraditional supporters for specific pieces of legislation. This work *may* have long term benefits depending on whether these same groups are engaged in conservation projects of relevance to them in the future. PWC's investments in Latino constituency-building generated a number of specific laudable programs that involved Latino organizations, opinion leaders, youth and community members. Whether these will have a significant effect on long-term support for wildlands conservation cannot be assessed at this time. Constituency building among nontraditional groups requires a long-term process of relationship- and trust-building involving work on projects of mutual interest. For several reasons, this process is out-of-synch with the five-year, wilderness-focused, outcome-orientation of the PWC Program. There is no doubt that most of the specific projects funded by PWC in this area were valued, and they provided good strategic insights to PWC staff and others interested in building support in the Latino community. But they have produced less tangible conservation outcomes in the short-term than other areas of the PWC program.

## *Mobilizing Traditional and Nontraditional Groups*

*8.1 PWC's policy work involved outreach to mobilize traditional and nontraditional constituencies in support of arguments made to elected officials. Some of these outreach efforts should bear fruit over the long term, particularly if they are reinforced through future activities.*

Many of the policy campaigns described in section 7 included PWC-funded work organizing local constituencies in support of protection legislation, and grantees would not have been as successful without clear evidence of this support. For example, the California Wilderness Coalition conducted outreach in targeted congressional districts to encourage a variety of groups to support wilderness bills, oppose new RS 2477 routes, poorly sited power lines and wind power construction, and promote ordinances curbing ORV abuse.

In a number of cases, this work involved activities to engage nontraditional groups. For example, the California Wild Heritage Campaign successfully engaged local Republican officials, winemakers and sportsmen in the North Coast wilderness campaign. In CWC's case, development and distribution of a glossy PWC-supported desert guide, *Desert Legacy: Guide to the Wild Mojave*, helped build support for wilderness among local commercial interests. Chambers of Commerce expressed admiration for the guide, and the Barstow Chamber of Commerce Executive Director unexpectedly stated in a press release for the guide that "wilderness is good for the local economy." As one respondent noted, "the soft approach to talking about wilderness was definitely a success." CWC continued to distribute the guide and sought letters of support from those businesses and chambers of commerce with which they have built relationships through the guide.

These activities are important short-term, campaign-directed activities that sought to influence the direction of a specific piece of legislation. Some of these engagements may lead to ongoing mobilization of nontraditional groups, including Republicans and sportsmen, but mostly if these groups continue to be engaged in conservation issues. This involves working on issues of mutual interest, and establishing longer term presences in the places that nontraditional constituencies are located. It may involve more community-based restoration and stewardship activities along with engagement in sustainable economic activity than has been the norm for many traditional environmental groups.

Long term support is not just a matter of building awareness of wilderness values in target audiences, but of understanding their issues and modifying protection proposals accordingly. For example, Trout Unlimited received PWC funding to organize sportsmen across the state and hired two field staff in "mission-critical" locations, Truckee and Salinas. In their final grant report, they note that "Long-term diplomacy and education at the grassroots level are necessary to address the concern among some sportsmen that enhancing protection for roadless areas will not mean a loss of access for hunting and fishing, and that motorized access, if currently allowed in a backcountry area, will likely be continued under new management paradigms." While sportsmen may support protection for areas with popular fisheries, TU noted that a logical way to engage them was through the designation process for off-highway vehicle use in California's national forests. In this issue, however, anglers may well oppose more restrictive forms of wildlands protection.

Even more powerful for long-term success than outside groups coming into communities to engage nontraditional constituencies have been the efforts of community-based groups whose work has softened the opposition to environmental concerns at the local level. As discussed in section 6, the community-based work of the Smith River Alliance, the Mojave Desert Land Trust and the Friends of the Inyo has helped shift the nature of the dialogue about wildland protection in their communities. Similarly, Sierra Forest Legacy's wildfire management work in rural, fire-prone Sierra communities may engage those communities in a way that creates long term benefits for wildlands protection that was not possible with SFL's traditional advocacy approach.

Most of this work involves a long-term process of transformation, so we should not expect significant change in a matter of a few years. This is particularly true when constituency-building activities are aimed at changing the positions of elected officials, who have established interests and agendas. For example, National Parks Conservation Association received PWC funding to recruit and train conservation advocates in the Central Valley, with the goal of influencing Congressional leaders including Rep. Richard Pombo. NPCA staff were successful in "engaging prominent community leaders in public actions that called upon decision makers to change position on an issue or show support for something that they had yet to take position on. Examples of this include the Mineral King Cabin issue at Sequoia and Kings Canyon national parks as well as air quality and park funding issues. With all of these issues, NPCA staff worked with an impressive list of local leaders, many of whom know key federal elected officials personally or who have donated to their campaigns, to garner media, submit letters, and make phone calls to or meet with the federally elected targets."

While successful at engaging local leaders, the entrenched nature of existing elected officials meant that NPCA's impact was ultimately limited, at the least in the short term. In their view, members of Congress targeted for constituent pressure, "have proven resistant to supporting pro-environment stances. They even turned hostile toward NPCA staff after feeling the heat of media pressure in their local papers asserted by local leaders, which made developing a positive working relationship with them incredibly challenging. … In an effort to build positive working relationships, we therefore decided to pick conservation issues that were 'safe' or less controversial to approach the congressmen with, while staying out of the public eye on more high-profile conservation fights. Although this tactic was not successful with the congressmen, it proved to be very positive in terms of building relationships with local leaders."

## ***Outreach to Latino Populations***

*8.2 A significant amount of funding was spent on outreach and constituency building among the California Latino population, and was carried out by environmental, Latino and faith-based groups.*

Approximately 27 grants were made to 15 organizations with the primary purpose of constituency building among the Latino communities in California. Over $1.5 million was spent in the South Coast, funding both traditional environmental groups such as Audubon California and Latino groups such as Consejo de Federaciones Mexicanas en Norte America. However, work in the South Coast relied primarily on existing Latino groups, including groups focused mostly on social justice and environmental education. Efforts were carried out in the greater Los Angeles area, particularly in communities living near the Los Angeles and San Gabriel Rivers. Grantees reflected some of the heterogeneity within the Latino communities of the Los Angeles region, including diverse socioeconomic groups and age groups, and had significant prior experience engaging Latino constituents.

Over $2 million was spent in the Central Valley, which covers seventeen counties with a population of about 7 million people and approximately 1.8 million registered voters. Latinos are approximately 32% of the Central Valley population and 46% of the South San Joaquin Valley region, and are expected to constitute a majority of Valley residents within the next two decades. Seven grantees worked on constituency-building. Three of these groups were local, including the Catholic Charities Diocese of Stockton and the San Joaquin River Parkway and Conservation Trust. The other four groups – including Defenders of Wildlife and the National Parks Conservation Association – were national environmental groups which used grant funds to establish bases of operations in the Central Valley cities of Fresno, Modesto and Stockton. Overall, grantees in the Central Valley were less grounded than those in the South Coast in the Latino community or issues associated with Latino populations, such as public health or environmental justice.

PWC funded a variety of activities whose broad goal, while not often clearly stated as such in project proposals, was to develop an awareness of wildlands values and engagement in environmental issues in targeted populations. These activities included:

- **Research on attitudes.** For example, Centaur North Communications, Inc., a consultant working under four contracts with RLFF, conducted focus groups and telephone surveys of low-income and middle-class Latinos to understand how they perceive wilderness, open space and related conservation issues. Similarly, Fairbank, Maslin, Maullin & Associates, an opinion research firm, conducted surveys and focus groups to better understand distinctions among groups of Latino voters, and to determine which messages about forest management and protection resonated with Latino voters. The San Joaquin River Parkway and Conservation Trust used focus groups and community-wide public opinion polling to focus on the specific perspectives of the Latino population in their two counties. "We learned some unique things about the Latino community and how they view the river," one respondent observed. "They don't see it as a neat, healthy place to be; they see it as a dirty unsafe place to be. They also perceived it as a safety issue when swimming was mentioned; water safety was a barrier to getting them engaged. And they don't see the San Joaquin River as necessarily a place where they are welcome. It is perceived to be for the well-off because of the big homes on the bluffs overlooking the river. So we knew what messages that we needed to talk about and work on."

- **Outreach and community education.** Grantees hired outreach coordinators, and conducted a variety of outreach activities. For example, the National Parks Conservation Association staffed information tables at: five community events celebrating Earth Day in Pleasanton, Stockton, and Fresno; Labor Day weekend in Yosemite National Park; and the Central Valley Hispanic Chamber of Commerce Business Exposition.

- **Media work.** Grantees used print, television and radio to build awareness of conservation issues in nontraditional communities. For example, Centaur North wrote an op-ed article that was published in *La Opinion*, the most widely read newspaper in Los Angeles, which may have built constituent awareness to increase pressure on Congressman David Dreier (R-CA-26) to remove provisions promoting offshore drilling for oil and gas from the Budget Reconciliation Package. The National Parks Conservation Association was successful at airing a public service announcement on three radio stations, which starred Cristina Saralegui, a nationally well-known talk-show host. Audubon at Debs Park's Spanish-speaking bird watch program was featured in a *Los Angeles Times* article, which may have sparked greater interest in the park's programs. With PWC funding, the SJRPCT developed a 16-page supplement in *The Fresno Bee* entitled "A San Joaquin River Journey," with a Spanish language version published in *Vida en el Valle*, the weekly Spanish-language edition of *The Fresno Bee*. *Vida en el Valle* was named the country's best Latino newspaper by the National Association of Hispanic Publications and is also the country's largest Latino newspaper, having a distribution of 167,000.

- **Convening of Latino leaders.** For example, PWC funded the William C. Velasquez Institute to hold a one-day discussion of issues affecting the environment and healthy communities during the 2006 National Latino Congreso. This convening resulted in the adoption of a strong national Latino conservation agenda and included four environmental resolutions that endorsed wilderness designation in California and the protection of South Coast wildlands from a proposed highway (discussed below), among others. The Congreso also included wildlands and urban river workshops that educated attendees about the importance of protecting wildland areas.

- **Voter registration.** Since PWC believed, based on polling, that Latinos were more likely to support wilderness designations and wildlands protection, they funded grantees to conduct voter registration drives targeted at Latinos. The Southwest Voter Registration Education Program (SVREP) conducted get-out-the-vote drives and multimedia outreach (radio, print and television interviews, public service announcements) with the goal of increasing Latino civic participation. Initial goals in the effort included registering and turning out 12,500 Latino voters. While, SVREP's voter registration goals were not achieved (approximately 1,600 were registered), SVREP GOTV goals were exceeded (approximately 18,000). This GOTV success represents an historic high for SVREP in many of these communities.

- **Job training.** For example, Project Amiga received a grant to develop and implement a Green Careers Training program aimed at increasing participants' environmental stewardship, activism and job skills. Project Amiga is respected in the Latino community, and was recommended by RLFF contractor Centaur North as an organization supported by Representative Hilda Solís. The organization works primarily with low-income and disadvantaged Latinos and prepares them for jobs through job training and education.

## *Innovative Ideas; Significant but Limited Accomplishments*

*8.3 While it is too soon to judge whether or not new constituencies for wildlands protection will emerge, PWC grants for constituency-building nonetheless sparked some innovative activities, produced a number of notable accomplishments and revealed some important lessons for future constituency-building work.*

While the non-traditional constituency-building portion of the PWC program was perceived by some staff and observers to be "wildly unsuccessful," our assessment revealed some notable accomplishments and valuable insights for future work in this area. Constituency building was a small portion of the PWC program, representing 2.4% of total project funds. Nonetheless, PWC grants appear to have begun "breaking-the-ice" of an important strategy area by providing models, challenging some preconceptions, and providing a springboard for future strategy development within the broader conservation community. PWC-funded projects generated significant understanding, engaged Latino youth, and ultimately had an impact on several specific policy battles. Perhaps the most significant impact of the program's investments, however, was in the way it encouraged mainstream environmental groups to experiment with new strategies, and Latino groups to become more familiar with conservation issues and their relevance to their specific concerns.

### Encouraged Innovative Thinking and Experimentation

Building support for wildlands protection by engaging nontraditional constituencies by definition requires nontraditional behavior, and RLFF's investments encouraged grantees to "think outside the box." PWC funding enabled several well-established organizations to experiment with new ways to reach new constituencies. One grantee commented, "They gave us funding to try some things. … We started to build new partnerships in a new way." Another respondent noted that the PWC funding gave his group "a chance to try something new." It also has "taken some Board members to the next level ... This program has given their work a 'global nature' and a 'new focus' in which they look for more non-traditional opportunities. It also has made their work more exciting because of this new focus."

Another grantee commented that "We have come to appreciate that you can't just parachute in with all of the old messages. You can't talk about polar bears." Instead, outreach activities need to be local and tailored in a way that is relevant to each specific community. "RLFF has been very innovative," commented one grantee. "They are willing to try new things." In fact, one of the biggest concerns of this grantee now that the PWC program is coming to a close is less the loss of a funding source and more the loss of an innovative partner: "We might not see that level of innovation and creativity" from other funders.

- **San Joaquin River Trust.** PWC enabled San Joaquin River Parkway and Conservation Trust (SJRPCT) to conduct a focus group with Latino participants in order to better understand their perspectives on conservation issues. “We learned a tremendous amount,” said one respondent from that organization, “both about the basics of communicating and the other groups that we needed to be talking to, one of which was the Hispanic Chamber of Commerce which became a door-opener for us.” Several activities were triggered by the PWC support: “Our partnerships and connections with the Hispanic Chamber of Commerce and other groups would not be happening without the PWC funding. We took the entire staff of *Vida en el Valle* on a canoe trip that sparked an entirely new program. What happened was that one of our program managers on this trip had the idea of creating a bilingual canoe trip. What we did was create a network of people who could bring friends along on canoe trips; we had the infrastructure to do the trips, they had the friends. Now there is a program in place where those that are bilingual who want to help us lead these trips get trained in doing canoe trips. It was just something that bubbled up. … That is an example of a program that is not like the usual ‘go do a project and then move on to the next one’. We’ve got an ongoing program and a constituency for it.” Twenty-five guides have been trained and a dozen trips have been taken so far this season, serving 150 people.

- **Defenders of Wildlife.** The PWC funding enabled some grantees to seize emergent opportunities for constituency-building. For example, as one grantee recalled, “We recognized that the success of unseating Richard Pombo is in part due to the fact that the area is changing so we thought ‘let’s get someone on the ground to work on getting the conservation message out and see what happens.’ RLFF contacted us and I jumped on it because it was something I’d been thinking about for a long time.” The PWC funding enabled Defenders of Wildlife, a national environmental organization, to hire someone to staff a new office in Stockton. While not Latino himself, this individual is bilingual, married to a Latina and a long-time resident of Stockton with ties throughout the community from prior organizing experience. Only time will tell whether a sustained constituency develops from this new presence and activity in the community, but one respondent commented “it’s going pretty well; we’ve been surprised at how engaged and enthusiastic people are; it’s like there is an untapped well of interest.” This new position is notable as well because, in the respondent’s words and emphasis, “this is *the first time* our organization has dedicated a staff person where this [constituency building among Latino and Asian communities] is their thing to do. Our headquarters is in DC, so this need isn’t as much on the organization’s radar screen as it should be.”

- **Catholic Charities.** Similarly, another respondent who works with the Catholic Charities Diocese of Stockton saw an opportunity inherent in the Bishop’s apparent environmental concern. “He had a tiny grant from the US Council of Catholic Bishops and wanted to do something about the sacredness of the Central Valley. He approached two other Bishops in the valley but they said ‘we’re not interested,’ so he said ‘I’ll do it myself’.” His interest is enabling this grantee to weave conservation objectives into several activities in the diocese, using PWC funding to partially support two social justice coordinators who are Latina and who include environmental topics in their one-on-one conversations with parishioners. They are also hosting an environmental justice retreat for all priests, deacons and their wives from the diocese. Thirty-two parishes and 100-120 individuals will participate in this retreat in October 2008. As this grantee noted, "If you get buy-in from the guy who is standing in the pulpit, it unlocks a lot of doors and also gives a lot of legitimacy to the folks working for the church on environmental issues. …This is all thanks to PWC. Without the PWC funding we would never have come up with that idea nor had the resources to do it."

## Direct Impacts on Policy and Management Choices

Some grants directly affected important policy and management decisions; these included campaigns run by PWC grantees Center for Law in the Public Interest (CLIPI – now The City Project) and Centaur North, and an effort to stop highway construction at the San Onofre State Beach that appears to be succeeding.

- **National Forest management planning in Southern California.** The work by CLIPI and Centaur North to increase public participation in the development of the four Southern California national forest management plans and draft Environmental Impact Statements was one of the most successful PWC-funded campaigns. Both organizations were responsible for engaging thousands of residents in the Los Angeles area, particularly in communities of color. Through CLIPI's "Ecology of Hope" program, the organization and its partners built a diverse coalition around public participation in National Forest management plans; engaged hundreds to thousands of citizens of color in participating in the management plans through the development of bilingual outreach materials; wrote 35 pages of comments to the National Forest Service concerning its management plans for the four Los Angeles area national forests; wrote legal and white paper documents concerning access and availability of green and open space in urban Los Angeles; co-authored an op-ed in the *San Gabriel Valley Tribune* expressing dismay with the final forest management plans, and conducted studies concerning transportation to local national forests. Centaur North conducted similar activities, including mailing 25,000 letters and organizing meetings to assist other environmental organizations working on the campaign.

  The most significant short-term outcomes resulting from CLIPI, Centaur North, and other environmental organizations' efforts was the Forest Service's willingness to work with and address the coalition's concerns. The Forest Service expanded public participation by holding six additional public open houses in communities of color and low-income communities. The Forest Service also invited CLIPI Executive Director Robert García to speak at a USFS regional forum about meeting the needs of a culturally diverse society. Following publication of the *San Gabriel Valley Tribune* article, CLIPI and allies met with the four Forest Supervisors to express its concerns and recommendations for diversifying access to and support for the national forests. Some of these recommendations include increasing public education and involvement in the forests; funding community programs that connect inner-city residents to the forests; maintain and protect the biological diversity of the forests; promote low-impact recreational use of the forests; distribute the benefits of the forests, such as job and volunteer opportunities equitably; and provide and support public transit alternatives to the forests.

While judging the ultimate impact of a group's comments on enigmatic Forest Service decision-making is always a challenge, these efforts nonetheless raised awareness and fostered engagement of Latino communities in national forest issues. If this involvement is sustained, a constituency for these issues may become rooted in place.

- **Foothills South Toll Road.** CLIPI (now known as The City Project - TCP) also worked with a broad coalition of conservation, Latino and Native American groups to oppose construction of a proposed toll road that would link the 241 Toll Road to Interstate 5 near the coast at the boundary between Orange and San Diego Counties. The proposed road would bisect the San Onofre State Beach, the 5th most visited park in the California Park System, affect a dozen endangered or threatened coastal species, threaten sacred Native American sites, and force closure of a campground, among other impacts. According to one respondent, "it was the state's ANWR. The most prominent visible controversy in the state for the last couple of years having to do with protecting a state park."

  The City Project's work (supported by RLFF funding and staff, building on the groundwork laid by PWC) to organize a broad-based coalition of Native American and environmental groups in opposition to the project helped to undercut road proponents' framing of the issue as one of racism. According to one interviewee, "The proponents tried to turn it into a racial issue of white surfers trying to exclude Latinos and others from the Inland Empire from getting to the beach, which was ludicrous." But through the connections developed through PWC and other RLFF programs, "We were able to supplant that argument. Latino organizations working with Native American groups provided key testimony and key coalitions. Even the Anahuak Youth Soccer Association from LA participated in the hearing. We wouldn't have had that connection without the RLFF-funded programs." In response the California Coastal Commission voted 8-2 in February 2008 to oppose the project. Newspaper and Internet coverage of the outcome identified TCP and RLF as important members of the tribal-Latino-conservation alliance against the project, and the mapping and demographics work of TCP and GreenInfo Network on who uses San Onofre as important inputs to the Commission's decision.

  The Foothill-Eastern Transportation Corridor Agency appealed to the U.S. Department of Commerce to overturn the commission's decision. A public hearing on the appeal was held at the Del Mar Fairgrounds in September 2008. Six thousand people attended a raucous hearing. The City Project's Robert Garcia and several Native Americans testified in opposition to the toll road and signed onto the opposition letter that included signatures of the coalition of conservation groups opposed to the road.

  On December 18, 2008, the U.S. Department of Commerce rejected an appeal by the Transportation Corridor Agencies (TCA) of the California Coastal Commission's February 2008 decision. RLFF staff viewed the decision as "a significant victory for the PWC-supported Southern California State Park Defense Project," the coalition of conservation and community organizations led by PWC consultants and PWC grantee, the California State Parks Foundation. Despite the victory, TCA members appear intent upon continuing their pursuit of the project.

## Significant Understanding or Infrastructure for Change

Other projects produced important knowledge about the strategic focus of constituency-building work that may bear fruit in the future, if this information is published and linked to others' grantmaking and action priorities.

- **Faith-based organizations in the Central Valley.** For example, Betsy Reifsnider, a consultant who worked with the Catholic Charities Diocese of Stockton, assessed the potential for engaging faith-based organizations in PWC. She conducted one-on-one interviews with existing environmental and land stewardship programs of faith-based organizations at the national and state-level. A key product was a report gauging the extent to which environmentally-supportive, faith-based constituencies could be activated in key Congressional districts. She noted some key things that should be applicable to conservation organizations working with non-traditional audiences: build personal relationships, ask how you can fit into a faith group's priorities, do your homework, and look for links in each other's work. To RLFF, she suggested providing interested secular environmental groups with the tools to work with faith groups, funding the organizations that have the contacts and institutional support to outreach to faith communities, and supporting interfaith groups that provide religious leaders with training on environmental issues.

- **Latino attitudes about open space and wilderness preservation.** Centaur North's Family Forest Project research results are valuable for understanding Latino attitudes about open space and wilderness preservation, and related environmental issues. This information can be used by both traditional and non-traditional environmental and Latino organizations to develop environmental messages, programs, and policies that promote the values, concerns, and perspectives Latinos care most about, and to ultimately build long-term constituencies and support for wilderness and open space issues.

  Some of the key findings were: (1) Latino voters relate conservation issues to public health issues and understand that protecting local forests enhances air and water quality. (2) Public health issues trump economic development, but Latinos still care about the latter. (3) Latinos are most stirred by poignant messages about trans-generational responsibility and leaving a better world for future generations. (4) Latinos value family and community more than the individual. (5) Latinos do not identify as traditional environmentalists, but are committed to environmental issues and public spending bonds for environmental preservation and improvement. (6) Latinos are more likely to act to protect National Forests and wildlands if symbolic values are threatened. For example, if the spotted owl was threatened, Latinos might be concerned, but they might be more moved to act if the spotted owl was considered sacred to Native Americans. (6) Latinos, particularly active Catholics, will commit to environmental issues if they are faith-based.

  Centaur North presented these findings and recommendations to traditional environmental groups at a seminar at the University of Southern California. The organization conveyed the importance of reframing traditional environmental goals to make them more meaningful to Latinos.

## Outreach to Latino Youth

Given the age demographics of the Latino populations in California and the interest in building a long-term constituency for wildlands conservation, it was important to reach out to Latino youth, and PWC utilized existing organizational infrastructure to do so. For example, the Tuolumne River Preservation Trust (TRPT) made an important connection with the Hispanic Leadership Council, as they are the parent organization of the Hispanic Youth Leadership Council, which has clubs in many high schools in the Modesto area. TreePeople and Los Angeles Conservation Corps (LACC) successfully engaged large numbers of Latino youth and families in their environmental education programs.

- **TreePeople's Natural Connections program.** This PWC-funded effort engaged over 17,000 K-6 students through Eco-tours, which provided them with a hands-on environmental education experience and a nature tour; nearly 1,900 adults planted or cared for 20,126 trees; nearly 6,400 students helped transform urban environments by planting 1,023 trees on Los Angeles school campuses; and over 1,500 students and families participated in multiple environmental education and tree-planting events. TreePeople evaluations revealed that participants' environmental awareness increased significantly, particularly through hands-on, service-oriented activities and repeated program exposure. For example, in one Natural Connections activity, students learned how water carries trash through a watershed and impacts urban environments. Post-program evaluations indicated that, "many participants made specific connections to their own family's waste disposal methods, and pledged to reduce littering in the future."

- **Los Angeles Conservation Corps Wilderness Awareness Program.** Similarly, a significant number of LACC youth, "most of whom have not been out of the city – even to the beach or nearby nature areas," according to one respondent, participated in the organization's Wilderness Awareness Program, including environmental lectures, lab, demonstrations, and discussions, interpretive hikes, and overnight camping trips. "We didn't have a program like this before," the respondent commented. "It was not structured and more informal…we just went on hikes." "With this program, we got to take kids to Joshua Tree," for example, "where they did rock-climbing." "They would have never had these types of opportunities before…because financially we did not have the opportunity." "We were able to dedicate a staff member to educate and build capacity to do [the program]…and do it safely. That's huge."

  In reflecting on the program, another grantee respondent remarked that, "It's unheard of these days just to dedicate that kind of money to a program like ours. The kids loved it. It was life-changing for many of them." She added that outdoor experiences like the Wilderness Awareness Program "changes their outlook, gives them motivation…opens up their minds to career paths…that typically…they would not have had the opportunity to think about." Further, she believes corpsmembers will "absolutely visit local wildlands, like Azusa Canyon [because] they have been amazed by the beauty of these places and will return with their families to these areas. The program has helped them conquer their fears because they lacked education. It provided them with a unique opportunity in a safe setting with supervisors who are mentors."

At bottom, simply the sheer numbers of people who were reached by these projects has to be seen as a significant accomplishment. TreePeople engaged nearly 27,000 individuals in the Natural Connections Program; the LACC Wilderness Awareness Program involved 4,200 corpsmembers. While not reaching its enrollment targets, the Southwest Voter Registration Enrollment Project still registered 1,600 new voters and reached 18,000 in its GOTV drive.

It is difficult to determine the exact impact of these levels of participation on future constituent support. But there is at least a significant chance that some of the participants will take positive actions on conservation issues in the future, and some may have been motivated to become leaders on environmental issues, should their nascent interest be developed through further opportunities. Indeed, as spotlighted by one respondent, the first Latino member of California's Congressional delegation during the 20th century, Ed Roybal, was reported to explain his progressive stand on social issues and his 100% voting record on environmental causes by saying, "I worked for the Civilian Conservation Corps and it saved my life and I have never forgotten it."

## *Mismatch between Wildlands and Latinos?*

*8.4 While the program's grantees created projects of real value, the starting frame of the PWC program – a focus on wildlands – was not one that was well-matched to the more immediate needs and opportunities associated with outreach to Latino groups.*

There is no doubt that Latinos are an important constituency for most political issues in California's future, but the environmental issues that Latinos currently care most about are less in the wildlands and wilderness area and more in the realm of water quality, clean drinking water, air quality and access to parks and recreation areas. Hence, the PWC program's focus on wildlands and wilderness may have had intrinsic difficulties when trying to use the program to recruit Latinos into roles as political supporters of land protection. The National Parks and Conservation Association, a PWC grantee, noted that although the Central Valley is approaching 40 percent Latino population, only about six percent of the visitors to Yosemite are Latino, and that the pattern holds true for the Golden Gate National Recreation Area. As one respondent noted, "Many Latinos do enjoy rivers and value nature, but may not see them through the lenses of 'preservation' that mainstream environmental organizations use. … Latinos may care, but they just may care differently, and in relationship to other social and economic factors, and it is important to take that into account" when undertaking constituency-building work.

### Cultural Lenses

Latinos may well not see wildlands issues through the same cultural lens. For example, studies show that Latinos use national parks differently than other ethnic groups. They are more likely to relax, have family barbeques, and sit in the water, whereas other groups are more likely to engage in traditional national park activities such as hiking. The San Joaquin River Parkway and Conservation Trust (SJRPCT) recognized through its focus group study that Latino use of the San Joaquin River is much more oriented to family picnicking than it is to hiking on trails and other traditional uses. That realization "affects our Parkway Planning," a respondent from that organization commented. "Now we are planning facilities -- in particular large family picnic spots -- that we otherwise wouldn't have thought of."

One respondent commented that in many Latino cultures, land is more closely associated with a sense of livelihood, and environmental careers are often not perceived as desirable because they are associated with backbreaking labor. Indeed, many participants in Project Amiga's Green Careers job-training program were somewhat resistant to learn about the environmental sciences and jobs associated with the field because they held negative perceptions about them. Many participants associated jobs in the environmental field with backbreaking crop-picking and landscaping work that is carried out in the scalding sun. They have been exposed to media messages that Latino immigrants and other farm laborers take jobs that Americans will not take. Landscape architect and landscape contractor work is synonymous with farm labor work. This PWC grantee concluded that future programs aimed at promoting green collar jobs need to think clearly about the framing of their messages.

## The Importance of Framing and Local Relevancy

Framing is important to constituency-building work, as is a connection to issues of local relevance. Connecting with urban river conservation, environmental justice or public health concerns might be more successful in achieving long-term mobilization of the Latino community than the wildlands frame associated with the PWC program. A number of respondents questioned the traditional outlook of mainstream environmental groups which tries to get "them" aligned with "our" objectives. The PWC grantees suggested that a more appropriate path is the opposite: to help nontraditional communities achieve their own objectives and meet their own needs, and in doing so, to begin building the relationships, understanding and trust that facilitate partnerships on shared or compatible issues. As one grantee put it, "It's fine to ask people to go to Sacramento and be involved in advocacy, but the folks just aren't there yet. They have been so put down and so ignored and the idea that their voice actually matters isn't there. So it's a pretty big jump to get from where folks are now to where people actually advocate about the environment." Another grantee commented that "For us, the biggest lesson learned is that it takes time and it can't be done in isolation of other issues. The environment is just one aspect of a larger program and some people will be interested and some people won't be."

Almost all respondents emphasized how critical it is to work on issues and places that are of direct interest to targeted groups. As one grantee put it, "you have to make it relevant to their lives and their culture." One respondent explained, "The headwaters of the Los Angeles River are in Forest Service lands. But you aren't going to immediately get a Latino group in the heart of LA to want to comment on a forest plan. Instead, you need to work with them on a project that mattered to them in LA on the LA River. Ultimately, you could get them to understand the connections with the headwaters in the forest."

Similarly, Defenders of Wildlife has identified two local areas of wildlife value for their constituency-building outreach program, the Lower Calaveras River, which runs through poor Hmong and Latino communities in Stockton, and the San Luis National Wildlife Refuge located adjacent to a primarily Latino community. "These two areas are a good organizing point," a respondent explained. "We have endangered species on the refuge -- the only Tule elk herd left in the Central Valley. We want to get folks to focus and know what a resource they have; to link the concept of conservation to something in their own community." "The idea," this respondent continued, "is to get folks to understand that they have these great places in their backyard -- this habitat and wildlife -- to understand these places, and that they are special and benefit them; to have clean-up days, to form 'friends of' groups."

Another way to build relationships is by serving as a resource or providing a service to a potential constituent group but that may have little immediate return to the environmental organization itself. As one grantee put it, "as environmental organizations, we have forgotten to give gifts; to ask ourselves, is there something we can do to become a gift *for them*, no strings attached; to ask 'how can we be of service to them?'" An example was provided of the LA Conservation Corps partnership with the Mono Lake Committee that was born during the aftermath of the Rodney King riots in Los Angeles when leaders of the Mono Lake Committee asked themselves if there was anything that they could do to help. They initiated the now well-established trips to Mono Lake "where kids get to go canoeing on the lake, hike, have a campfire, and talk to Park Service rangers." This program has been in place for over 20 years now and has touched hundreds of individuals, but its genesis was purely community service.

Through its social justice coordinators, funded partly by a PWC grant, the Catholic Charities Diocese of Stockton has encouraged parishioners to form committees that have an environmental focus. The framing of the focus and purpose of the group that formed in the Sierra Foothills reflected the political sensitivity of the region. As one respondent described, "They decided not to call themselves the 'environmental justice' committee because both of those words are just not going to make it; forget that right now. So, it's called the 'Care for God's Creation Committee'." This group is focused on "the practical things that people can do to care for creation. They initiated a series of recycling, water conservation, and energy conservation tips in the weekly church bulletins. "So, that's where they are right now; if you can just establish something that people can agree on you can then take it to the next step and then to the next step." Slightly more than half of this committee's members have Spanish surnames, evidence that the approach is resonating with the Latino community there.

At bottom, constituency-building requires linkages between people's sense of self-interest and the issues that one seeks to advance. In this case, it was less clear that the objectives of PWC were viewed by targeted communities as in their compelling self-interest. PWC staff appears to have understood these connections quite well, along with the need to work in a stepwise fashion, but felt constrained by the program's definition of wildlands. In one staff respondent's terms, "There were a whole set of strategies involving Latinos in California, with the explicit direction of seeing that this was a really important political constituency to start to cultivate. And it wasn't going to solely be just a matter to having them sign up to work on our issues, but a matter of having them work on issues of importance to them, and then to engage them over time in issues that were more front-and-center to PWC. And we started down that path … and realized that this was about urban projects … and wasn't going to produce short term wins for wildlands protection. ... RLFF consequently raised funds from other sources to pursue these more urban projects." [Two urban river grant programs were created to provide more than $4.5 million to assist Latino and other underserved communities in establishing urban river parkways in Los Angeles and San Diego Counties and the Central Valley. The programs built organizational capacity and helped build alliances between Latino and conservation groups by funding efforts to expand green spaces in low-income communities.]

Adherence to a strict wildlands connection frustrated some grantees. As one respondent lamented, “our lands were not wild enough to meet the PWC classification but in terms of being able to implement constituency-building programs it might be that acquiring a piece of property and getting public access to the river near an urban community is a critical step in constituency-building. I had wished that their guidelines were a little broader in that area.” Complained another, “There was a lot of back and forth – more so than with other funders to get it just right.” According to a staff respondent, “We were much more restrictive in how we made those grants. We forced onto them an explicit tie to wildlands conservation, when the initial concept was to take an issue that was important to the constituency and go from there. But because of the limitations, we really started adding so many additional restrictions to how we originally envisioned making those grants that we did get in our own way.”

### Mismatch between Time Frame and Long Term Needs?

*8.5 The timeframe for success of the PWC program – a five-year funding cycle showing tangible impacts with most grants focused on 1-2 year periods of accomplishments – was not well matched to the need to build long term understanding, trust and relationships, or the magnitude of effort required given the size of nontraditional constituent groups.*

While PWC was created as a five-year program with multiyear grants to many grantees, ultimately, its time frame and focus on short term wins might have been mismatched to what is needed to advance wildlands constituency-building significantly, particularly with nontraditional groups like faith-based groups and Latinos. “It’s all about relationships,” said one respondent, in a message echoed by many others. PWC grantee Betsy Reifsnider in her work analyzing outreach needs to the faith-based community highlighted this same theme. Her key walk-away messages were to: 1) develop personal, face-to-face relationships, 2) fit into the community’s existing priorities and structure, not the other way around, and 3) provide sufficient time, space, and patience for trust and relationships to be built and sustained, don’t begin with policy.

One-time outreach is valuable, but ultimately is not likely to have significant long term impact in terms of developing environmental awareness, concern, knowledge, skills, and overall capacity to engage in conservation issues. Many of the funded organizations appear to have engaged participants on a one- or few-time basis. For example, 1,500 young people participated only one time in the Los Angeles Conservation Corps’ Wilderness Awareness Program. Environmental education literature shows that young people require repeated experiences in nature with a mentor to develop environmental sensitivity or appreciation for nature. They need additional procedural and knowledge-based skills to take action on behalf the environment. This all takes a much longer time frame for action than is often associated with a single or even multi-year grant.

Several grantees felt that their experience has reinforced the need to build momentum and stability. They worry that projects that have short time frames, or "episodic events" as one grantee put it, will not sustain the involvement, awareness and relationships necessary for successful long-term constituency-building. This respondent emphasized that "the biggest barrier is building within *our organization* the sustained ability to do these outreach projects." Another grantee echoed the same sentiment, "We have a grant this year but we're scrambling next year. If we run out of funding, we'll have to stop the program for a year. Even if it's not a lot of funding, having one staff person whose sole focus is consistently on this initiative is so important." Yet another respondent commented, "We need to keep the momentum going. Sometimes people get excited about something and spend money on it, and then after 5 years it's not as exciting so they stop spending money. But we can't make this change in just a few years; it requires a consistent attention. It's all about making connections with people in ways that resonate with them and that start to change the way they view the world. It's not just shooting an e-mail a few times. It's more about having a constancy and a presence and really building up a true and sustained network."

It is the case that the size and dispersal of nontraditional constituent groups targeted for outreach, including various segments of the Latino population, requires a much longer and deeper type of campaign to make significant inroads. Size alone makes this challenging work. Indeed, in the South Coast region alone, Los Angeles, Orange County and San Diego have a combined population of over 16 million people, including more than 6.5 million Latinos. Adding Riverside and San Bernardino Counties, yields a targeted Latino population of roughly 8 million.

To work at this scale and build the kinds of long term relationships needed to change attitudes and behavior requires multiple types of long term investments. It was not surprising that the National Parks Conservation Association (NPCA) working in the Central Valley and SVREP working in the South Coast both reported underachievement of their outreach objectives. In NPCA's words in a final grant report, "Our first challenge centered on the relatively large and diverse number of constituent groups and individuals that we originally decided to target. In suggesting outreach would occur to hunting and fishing groups, labor, businesses, local elected officials, Latinos, religious leaders, grassroots/mass individuals, seniors, conservationists, agribusiness, teachers, Rotarians and key donors to federally elected officials, NPCA took on an unsustainable number and diversity of entities and leaders to effectively engage with. This is especially true given that the region was largely unaccustomed to organizing activities prior to our arrival and because of the lack of existing infrastructure with which to run the campaign."

The timing of the Latino outreach work was also problematic. The same political forces that affected policy achievements (as described in Section 7) "made the push to have Latino grantees take positions on short-term wilderness issues now even less strategic given that the conservative Republican members ... were not likely to respond positively to the positions of these grantees," according to one respondent.

## *Clarity of Project Goals*

*8.6 Unlike many PWC projects, constituency-building grants often lacked clarity about specific intended outcomes, and hence were somewhat fuzzy about their logic of action and accomplishments.*

Constituency-building for wildlands conservation can seldom be undertaken in isolation from other issues of concern, and most grantees found it necessary to work in ways that were tangential to the wildlands objective. This reality, compounded by the long time frame for success, challenged some grantees' ability to identify clear project goals and report back substantive outcomes. Although grantees were provided with the "Project Outcomes" matrix, many did not utilize them in their interim or final reports. Further, some grantees reported on their organizations' full range of activities and outcomes that were not part of the PWC program. Overall, it was harder for us to determine what was accomplished as a result of this area of grantmaking and part of that had to do with the clarity of intended outcomes and the reporting of actual outcomes. Some of this may have to do with the capacity of community-level groups to identify clear outcomes and measure them, and future grantmaking might want to include capacity-building assistance as was provided to land trusts in the state.

Part of the problem, though, probably lies in the clarity of the goals of the projects themselves, and how they connect to wildlands conservation. Were the outcomes sought by these projects changes in understanding and awareness of environmental issues, understanding of ways to engage in decision making processes (such as by voting), development of attitudes and values, mobilization of youth, support for short term policy battles, relationship building, engagement and empowerment, job training, or some combination of all of these? All are legitimate ends as well as means to other ends.

Grantees were focused on different aspects of the awareness-engagement spectrum. SVREP believed that the critical need was not awareness or caring, but rather the procedural knowledge or support to know how to translate caring into action (in this case: voting). SJRPCT noted how after conducting its focus groups, they found that Latinos had very low levels of engagement with the San Joaquin River, but an overall interest in attending and participating in river-related programs and events. However, the work of other organizations seemed to be focused more on awareness, with the notion that Latinos may not "know about the issue." Both sides may be correct and both kinds of work are undoubtedly needed. But it would help to have a clearer logic of action built into each project, with measures of accomplishments defined accordingly. A clearer distinction between awareness and engagement in the objectives may help, since not all methods and strategies for awareness lead directly (if at all) to action or behavior change. And this may help in answering the question of how the work makes wildlands protection more likely.

### *Recognizing Diversity within the Latino Population*

*8.7 Many PWC projects recognized the Latino population as diverse, with numerous subgroups arrayed geographically, economically and culturally. In grantmaking, the population should not be viewed as monolithic.*

Respondents highlighted the need to view the Latino population as comprised of multiple diverse segments. New immigrants, Latino youth, Latino college students, the Latino and Hispanic middle class, farm workers, mothers, and other subpopulations may all relate to different issues, messages and intermediary organizations. For example, Latino college students may be accessed through Movimiento Estudiantil Chicano de Aztlán (MEChA) and other college Latino groups. For others, community-based, grassroots, faith-based, and Latino organizations and small businesses might be valuable partners. One PWC grantee, the Southwest Voter Registration Education Project, did a good job at identifying subgroups that it would target -- new voters, young voters, and foreign-born voters -- and identified approaches and limitations for each. For example, many Latinos needed procedural knowledge on how to vote from someone with whom they were familiar; other Latinos are supportive of efforts but may be ineligible to vote.

Overall, PWC did a pretty good job at selecting grantee organizations in the South Coast which reflected the heterogeneity within Los Angeles Latino communities. Nearly all of the organizations were led by or significantly staffed by Latinos (CLIPI, Project Amiga, Consejo, Audubon, Los Angeles Conservation Corps) and/or had significant prior experience engaging Latino constituents (Amigos de los Rios, Centaur North). All organizations connected with a wide range of Latinos comprising diverse socioeconomic groups throughout Los Angeles County: Consejo and TreePeople worked directly with Latino immigrants; Centaur North, CLIPI, and TreePeople engaged low- and moderate-income Latinos; Audubon, Project Amiga, and Los Angeles Conservation Corps engaged predominately low-income Latinos. Grantees engaged a range of age groups as well; TreePeople and Audubon worked with K-6 students; Project Amiga and LACC worked with young people ages 17 to 24; CLIPI, Centaur North, and Consejo all appeared to work with adults; and Amigos regularly works with a variety of young people and adults.

We were less aware of constituency building work in the South Coast outside of Los Angeles County, where significant Latino populations are located. RLFF distributed grants primarily to Los Angeles-based organizations, most of which carried out their programs in the Los Angeles area. Few organizations appeared to have been selected from or performed outreach activities in South Los Angeles, including the South Bay and greater Long Beach area, which are home to sizeable Latino populations. Centaur North and CLIPI crossed nearby county lines to engage Latino residents, but this work was limited.

## *Working in Culturally-Sensitive Ways*

*8.8 Culturally-sensitive outreach activities have led grantees to carry out work in very different ways than traditional environmental outreach.*

Respondents highlighted the importance of culture in devising outreach strategies to Latinos and other nontraditional constituent groups. Latino-led organizations are instrumental in building support for conservation measures within Latino communities. Latino leaders and staff members can provide credibility, promote cultural sensitivity, and gain access to Latino constituents that non-Latinos might not necessarily be able to. PWC was more successful working with Latino-led organizations in the South Coast than in the Central Valley. Indeed, nearly all of the PWC South Coast grantees were led by or significantly staffed by Latinos (CLIPI, Project Amiga, Consejo, Audubon, Los Angeles Conservation Corps, Centaur North) and/or had significant prior experience engaging Latino constituents (Amigos de los Rios). In the Central Valley, environmental groups were funded more than existing Latino groups, though some recruited Latino staff. One environmental group respondent noted, “We need to diversify our staff. That’s more important than working through existing Latino groups.”

Using Latinos to reach out to Latinos certainly starts the conversation in a more grounded place. For example, CLIPI/TCP Executive Director Robert García met with Speaker Emeritus of the California State Assembly, Fabian Núñez, to build support for urban park funding in the state’s 2006 infrastructure bill. Consejo is perhaps one of the only organizations that consistently works with Latino immigrants and can influence their environmental awareness and build their capacity to engage in conservation issues. As a result of PWC funding, the organization adopted environmental health as one of its three priority issues. They worked with community leaders, immigrants and health advisors to identify key environmental health issues affecting immigrants and then developed an Environmental Health Program Plan that addressed the issues. Organizations that hire Spanish-speaking staff are also able to access exclusively Spanish-speaking Latinos who otherwise would be excluded from environmental education and advocacy programming. For example, TreePeople hired additional Spanish-speaking staff to expand the Natural Connections program to Spanish-speaking families.

### ***Promotoras* and Community Networks**

Consejo and Audubon also relied on a *Promotora* model of organizing, based on a Latin-American style of community outreach in which community members educate, advocate, mentor, translate, and liaise with other community members about issues important to their community. Widely used in the public health community, *Promotoras* regularly connect with and target community members through door-to-door discussions, family gatherings, and community forums and meetings. *Promotoras* are usually extensively trained and play a critical role in disseminating important information. Consejo developed the Community Conservationist Model that trained 48 Latino *Promotoras*. Audubon’s new constituency building model employs the *Promotoras* model, which will train neighborhood leaders to engage and educate their neighbors about local nature and Debs Park. Audubon’s change to this outreach model is likely a result of Director Elva Yanez’s leadership, given her past experience in the public health field. [Indeed, according to one RLFF respondent, PWC funding of Audubon's work was in part to "support and help build a base for the Latina leader at the Center who was viewed as an emerging leader on natural resources issues."]

According to several respondents, Latinos are more inclined to learn about programs and get involved in them through people they know and are familiar with, such as local community and business leaders. For example, word of mouth was invaluable in recruiting participants into TreePeople's Natural Connections program. TreePeople attributed the near doubling of participants in the program's second year to past participants' sharing their experiences with family, friends, and neighbors. In their words, "Once constituent groups spoke with their friends and neighbors about the program, they invariably found its no-cost, bilingual educational structure both convenient and accessible. Word of mouth thus became central to enrollment: the majority of new participant sign-ups have indicated that they heard about the program through other people in their communities." TreePeople credited past participants for recruiting new participants from all over Los Angeles County, such as Pacoima (far northeast) and Long Beach (far south), where TreePeople did not actively recruit.

## Culturally-Sensitive Project Designs

Designing culturally-sensitive projects always makes sense whether one is working in the Modoc or the South Coast, but is perhaps particularly important when attempting to bridge largely urban Latino populations with wildlands issues. For example, the San Joaquin River Parkway and Conservation Trust (SJRPCT) noted that though several school classes participated in its youth program, Latino students could not afford its costs and were not participating. SJRPCT also found that the lack of available transportation was hampering some educational outreach efforts. According to one respondent, "A big barrier is transportation and distance to the river. Getting kids to the river is difficult because schools don't have money for field trips. We could use vans after school but trust is a big issue; people are reluctant [to entrust their kids to us]. And Fresno area public transit is very weak." SJRPCT is exploring different partnership possibilities that might help overcome this barrier.

TreePeople's Natural Connections Program faced similar challenges in event scheduling and logistics, which created obstacles to participation for some family and school groups. Originally, the program planned to conduct weekday events in less accessible wildland locations. However, many participants did not have the time or ability to travel to those locations during the week. TreePeople modified the program by scheduling more weekend activities and provided venues in local parklands closer to participants' homes.

- **Tailoring voter registration to the Latino community**. A final example comes from PWC-funded efforts to expand Latino voter registration. In its work in the Central Valley, SVREP worked at identifying the best locations for setting up and reaching out to the community. They identified places that Latinos are more likely to visit and be present, such as community service centers that mothers visit for WIC (Women, Infants, Children), or local bakeries and stores that cater to the Latino community (tortillerias, panaderias and taquerias and carnicerias). While larger locations such as Wal-Mart receive higher traffic and hence might have been seen as the place to work, SVREP found that the local small establishments had a larger Latino density and were the most successful locations. SVREP also established MOU's with the community centers, legitimizing their presence there and serving as a means to support each other. With the small businesses, the owners also worked as partners, explaining to their customers how the registration process worked and hanging up signs outside that stated "Register to Vote Here." Among other benefits of this approach, it serves to reinforce interactions among potential voters with people they know.

## *Organizational Impacts and Challenges*

*8.9 While PWC engaged in a relatively limited amount of capacity-building work aimed at building long term outreach and engagement capabilities, grantees engaged in these activities reported significant organizational impacts and challenges.*

PWC invested in a moderate amount of organizational capacity-building to support its constituency-building goals, though less so than it did in other program areas. The San Joaquin River Parkway & Conservation Trust (SJRPCT) and the Tuolumne River Preservation Trust (TRPT) both received assessments by La Piana Associates and both received capacity-building grants. SJRPCT received funding to hire an operations director, work on a capital campaign and marketing and outreach plan, and develop a Latino and Asian constituency building plan. TRPT received funding to hire a deputy director for programs, implement its fund development plan and major donor campaign, expand local community outreach with the aim of reaching diverse communities, and improve its financial management and administrative systems. Amigos and Friends of the Los Angeles River both received small grants in support of strategic planning and from these investments; FoLAR produced an attractive and clear plan.

SJRPCT received a capacity-building grant that is enabling them to conduct a two-day planning session with its Board of Directors that will focus explicitly on outreach to non-traditional communities. As one respondent described, "We are going to involve the entire Board in mapping their individual diverse journey. This work is helping our organization as a whole. What new things should we do; what existing things should we do?" It will be considered a long-term success "if it becomes a natural part of what our programs do which is to include diverse communities within our program almost to the point at which it is no longer something special; it is just what we do. I think we are going to get pretty close to it. It has already made a difference in our hiring practices in terms of the type of individuals we are looking for, particularly program managers. It makes a clear difference in who we are able to partner with." This respondent described the difference that has been made within their organization after a Hispanic staff member was hired: "Just the day-to-day interactions on projects and the hallway conversations help people have a better understanding of what we might do in terms of program offerings that might engage that community better."

PWC helped these organizations in other ways. As mentioned above, several PWC grants funded existing environmental groups to establish offices and create outreach programs in new areas of operation, including offices in the Central Valley. PWC-funded consultants also worked with other PWC grantees to increase their effectiveness. For example, TreePeople worked with Centaur North Strategic Communications, and used their experience and skills with urban communities to shape the program's recruitment, outreach, and education.

Grantees in this program area faced a number of the organizational challenges seen by other PWC-funded organizations, including lack of resources and staff, changes in leadership, financial difficulties, participant recruitment, and program logistics. These factors affected some of the organizations' ability to carry out programs and ultimately, strengthen environmental awareness and advocacy among Latino constituents. Nonetheless, some of the organizations designed creative solutions to circumvent these difficulties.

Staffing and volunteer recruitment issues plagued some of the grantees. At least two of the organizations were relatively young, had small staffs, and yet were growing rapidly. Amigos de los Rio mentioned that staff felt constantly "in over [their] heads, but…ready to make mistakes and respond honestly and with alacrity to them." Audubon at Debs Park experienced a change in leadership mid-way through the grant cycle, which could explain the organization's shift to a different program model and its inability to meet its intended goals and objectives. Recruiting participants has been challenging for a few of the organizations. Consejo was constrained in fully developing its *Promotoras* program because it could not recruit enough qualified immigrant leader candidates.

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At bottom, PWC did not make major inroads into establishing a new constituent base for wildlands protection in California. That goal cannot realistically be achieved in such a short time period and with such limited investments among a handful of organizations in two regions of a large state. The constituency-building program area was somewhat mismatched to PWC's wildlands focus, and is different from traditional environmental strategies. However, the PWC investments in this area were not without important returns as described above. To make more significant gains would require a longer and more flexible approach to grantmaking that is grounded in a robust logic model and set of strategic, coordinated, multiyear investments. RLFF's approach to grantmaking is actually a very good match to this need if it had greater degrees of freedom to act beyond that provided in the PWC program.

Perhaps the most notable short-term outcome may not be the difference that was made within nontraditional communities but rather the learning that occurred within some of the traditional environmental groups. As one grantee commented to us: "What the grants have done for us is build internal capacity and awareness, and have moved a general goal of ours into a specific set of actions and directions. The grants have put us on a path where we can point to specific things that we've done and new partnerships, as outlined in the grant reports. But the real take away is that it has positioned our organization and changed our culture and awareness and outlook about how to engage other communities." PWC has jump-started a valuable learning process by providing funding, flexibility, and the encouragement to simply try new outreach strategies.

Constituency-building is a slow process that takes time and sustained commitment. And precisely because it takes time, one respondent emphasized that now is the time to be investing as the demographics of California shift. "As the old saying goes," this grantee commented, "the best time to plant a tree is 20 years ago but the next best time is today."

# - 9 -

# SUPPORTING SCIENCE AND PLANNING TO GUIDE FUTURE PROTECTION

***To what extent did PWC generate new science and tools, an expanded set of plans, and new public processes that will guide future protection?***

PWC helped lay a foundation for future wildlands protection by creating new scientific information, helping to build visions of needed direction, and supporting ongoing planning processes that may make wildlands protection more likely. Scientific research and analysis was not a prominent goal of the PWC program. The Strategy Book recognized that there was “a lack of information regarding Modoc wildland conservation priorities, management needs and strategies,” and prioritized research as a funding need. It also identified a particular need to develop scientific understanding about mechanisms to protect and restore native oaks and grasslands in the Central Coast. Several early grants responded to both of these needs.

*“That work really set a framework for the conservation vision for that property.”*

*“It gave everybody this incredible ammunition to say this place was important.”*

In many other project areas, however, RLFF staff recognized that information was needed as a precondition to future action, and their own grantmaking ability required information to assess priorities. They referred to their investments in science as “apply-able” science. Activists were limited by the state of knowledge of species, landscapes and ecological processes in a number of key areas in California; managers were constrained by current knowledge in areas like fire ecology in the Sierra and the hydrology of rivers in the Desert. Critical corridors and landscape linkages needed scientific definition to enable acquisition and other protective action.

Climate change adds to these informational challenges significantly. While climate change was not recognized in the 2004 Strategy Book, a number of PWC grants implicitly provide room for adaptation. Following the three-year assessment, somewhat more attention was made on creating the science base to understand the implications of climate change for conservation management and protection.

New plans and better planning processes were identified in the Strategy Book as an important area for investment, and planning was one of the five overarching strategies by which RLFF coded grants. Planning was seen as a priority for the North Coast, South Coast and Desert areas. While a relatively modest area of activity for the program – receiving roughly four percent of all funding – seventy-seven projects were identified as planning projects and, in a number of places, plans were created that provide important guidance for future action. Indeed, some – like a set of reserve designs and corridor studies in the Desert and South Coast regions – may have been transformative in influencing people to think at a landscape scale. Many of these plans were produced through multiparty dialogues, which helped to create a shared image of a conservation-friendly future. Some of these processes are still ongoing, and provide a mechanism for guiding and motivating a range of organizations and citizens.

Most of the grants in the area of science and planning contained an explicit link from information to action. That is, grantmakers appeared to understand the need to begin a chain of interconnected activities, moving from creating new understanding to changing people's awareness of needed action, followed by mobilization of groups to engage in planning or political arenas leading ultimately to policy change or acquisition. While it may be easier to see success in terms of numbers of acres acquired or designated, creating the seedbed for future activity by investing in knowledge generation and the development of shared images of a sustainable future are equally important. These may have been byproducts of a number of grants, but they are important outcomes in and of themselves.

## *New Science; Expanded Tools*

*9.1 PWC invested in scientific research and analysis to assess conservation potential and the costs of development. PWC also underwrote new spatial and data management tools that enhanced the ability of the conservation community to use scientific information.*

PWC grants aimed at generating new scientific information were somewhat front-loaded in the five years of the program, and spanned the gamut of projects from the biology of key species to assessment of the conservation value of an important landscape. They also included work on understanding the costs of sprawl and other threats to wildlands values, such as groundwater pumping, and developing spatial tools that could be used by activists and policymakers to advocate and make better choices. Many of the scientific investments were targeted on specific policy questions or campaigns, which makes sense given the action-orientation of the program. Some of these investments helped to significantly change the likelihood of action; others should provide understanding and support for future actions.

### Conservation Assessments

Several projects assessed the conservation value of particular landscapes. These grants funded activities such as inventorying landscape conservation amenities, classifying vegetation and habitats, or analyzing parcel level data. Assessments of landscape-level conservation potential helped conservation organizations better understand the value of nearby lands. In some cases, they used that understanding as leverage to push for protection.

- **Tejon Ranch.** The 270,000-acre Tejon Ranch property is the largest contiguous, privately-owned land parcel in California, and an ecological keystone, sitting at the confluence of the Central Valley, Sierra-Nevada, Desert and South Coast Regions. The ranch, a PWC special opportunity area, is an important link between roadless lands in the Los Padres and Sequoia National Forests (Figure 9.1). Although property negotiations are still underway, an agreement reached in May 2008 between a coalition of five environmental organizations and Tejon Ranch Company substantially advances conservation goals in the region, including the permanent protection of 178,000 acres through conservation easements and designated open space areas. The agreement lays the groundwork for the public purchase of an additional 62,000 acres of the property. The ultimate protection of 240,000 acres would meet regional connectivity goals, according to PWC grantees Endangered Habitats League and South Coast Wildlands.

While RLFF used PWC funds to help move the negotiations along, their investment in a high quality conservation assessment was one of the catalytic events leading to protection. In 2003, PWC funded Conservation Biology Institute (CBI) to produce *A Conservation Assessment of Tejon Ranch*, refining previous CBI and South Coast Wildlands publications to develop reserve designs that conserve under-protected and potential habitats and key linkages across the ranch. The report identified lands that should be targeted for acquisition. In 2006, PWC funded a subsequent map-based reserve design, *Proposed Reserve Design for Tejon Ranch*, developed by CBI with South Coast Wildlands.

One respondent who worked on the Tejon Ranch negotiations credited these scientifically-credible plans and landscape designs with moving ranch conservation forward: “That work really set a framework for the conservation vision for that property.” Another agreed, “It gave everybody this incredible ammunition to say this place was important,” he said. “It really publicized the existence of resources that people just didn’t know about. It was a black hole on the map and these books just brought it to everybody’s attention.”

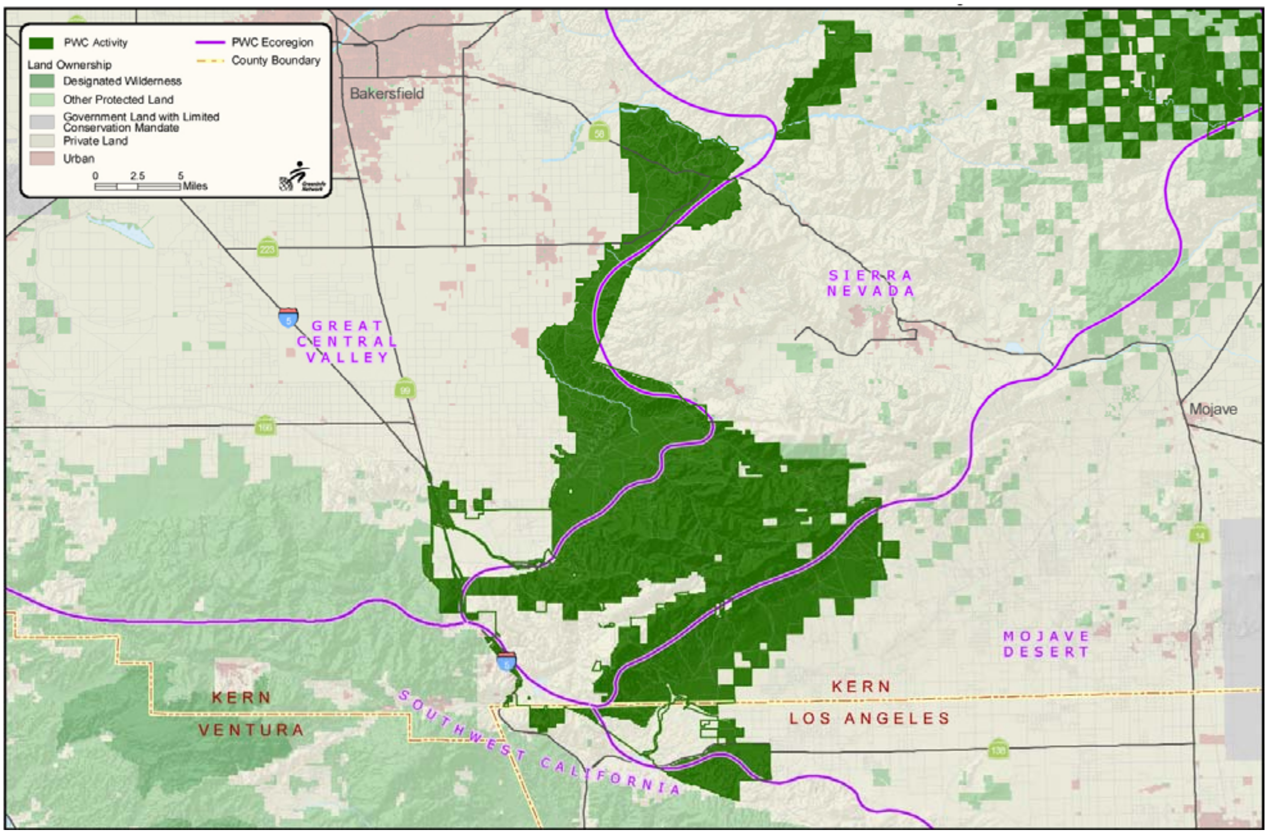


***Figure 9.1: PWC-funded science and negotiations helped protect the Tejon Ranch***

- **Conservation opportunities in Surprise Valley, Modoc County.** Surprise Valley provides an example of a conservation assessment whose impact has been much more limited because of the interaction between science-directed need, organizational capacity and political will. PWC funded two assessments of conservation opportunities in Modoc County, with a special focus on Surprise Valley, a PWC special opportunity area that is home to the highest density of breeding greater sandhill cranes in California. The assessments were motivated in part by the limited success that the program had in finding appropriate projects in the Modoc region.

  Peter Brussard and Elizabeth Peacock of the University of Nevada, Reno were funded to provide a "scientifically accurate account" of Surprise Valley's biological resources and their conservation potential. In their 2007 report, the researchers identified specific parcels of land that would be valuable acquisitions for conservation purposes. But they also noted that "valley residents in general are very conservative, and most landowners are unwilling to give up any rights at all. Furthermore, staff members in local agencies such as the Natural Resources Conservation Service (NRCS) are not supportive of conservation easements because of the loss of property rights."

  In the researchers' view, "The lack of a land conservancy in the area makes presenting the advantages of easements difficult, however. … Very few people in the valley see the need for additional conservation, and there is no 'fine old ranching family' that is willing to take the lead in land conservation—at least not yet." They recommended the best strategy would be to "watch for any properties coming onto the market that have high potential conservation value, contract for a rapid ecological assessment, and use the results of the assessment to make the decision on whether or not to purchase."

## Costs in the Absence of Conservation

Besides documenting the conservation value of particular landscapes, PWC was also effective at funding grantees to document the economic, social, and environmental costs of continuing without conservation. Documentation of threats became "credible-science based evidence for a whole lot of groups to use in the activism," according to one respondent. This work included studies of the impact of both suburban and rural sprawl, clearly one of the dominant sources of land conversion in California.

- **Impact of sprawl on Bay Area farmland and natural areas.** The Greenbelt Alliance received funding to update its marquee report, *At Risk: The Bay Area Greenbelt*. Since its first publication in 1989, the *At-Risk* report provides a snapshot of the condition of the Bay Area's farmlands, open spaces, parks, and other undeveloped areas. Developed with GIS data from PWC consultant GreenInfo Network, the *At Risk* report used parcel-level data to develop a more accurate estimate and map of high risk areas. The major finding of the report was that 401,500 acres of natural areas and working farmlands are at risk of being converted to sprawl development over the next ten to thirty years. Regionally, nearly 1 out of every 10 acres of land is at risk of sprawl, and in Solano and Contra Costa counties, that risk was twice as high. PWC's investments in the Greenbelt Alliance went beyond the report, however. It funded a "Green Vision Group" which was to craft a regional open space strategy drawing on the analysis in the report.

- **<u>Effect of rural subdivisions on wildlands.</u>** The Endangered Habitats League received funding to compile research and make recommendations about "rural sprawl," i.e., the impact of thousands of small-scale estate lot subdivisions between 2 and 40 acres in size. The study suggested that rural sprawl is "fragmenting the California countryside in a far more damaging way than the suburban housing tracts commonly blamed for California's environmental and fiscal crises."

- **<u>Amargosa River and ground water pumping.</u>** One PWC-funded project analyzed data on the Amargosa River's hydrology and detailed the effects ground water pumping can have on river flow. The Amargosa River is especially threatened by communities in Nevada pumping increasing quantities of groundwater from the aquifers that supply the river. Written by Greg James, a consultant under contract with PWC, the report synthesized and analyzed existing information regarding the Amargosa River's hydrology and discussed how ground water pumping affects river flow. It also examined threats to the basin and analyzed the history, legal issues, and implications of designating the Amargosa River as a Wild and Scenic River.

## <u>Research on Key Species and Management-Relevant Ecological Relationships</u>

PWC funded some scientific studies that sought to clarify biological and ecological behavior, though for the most part, these ecosystem and species-specific research projects appear to be embedded within larger projects or linked to other projects with goals identified in the Strategy Book.

- **<u>California spotted owl use of burned landscapes in the Sierra Nevada</u>**. The California spotted owl is a key indicator of old growth forests, and a primary goal of the 2001 Sierra Nevada Framework (which PWC grantees fought to protect) was to conserve the owl and other old forest species. PWC funded research by the Institute for Bird Populations (IBP) to assess whether spotted owls forage and roost in areas burned by wildfires. IBP studied a 150,696-acre area in the Sequoia and Inyo National Forests in the southern Sierra Nevada that had burned in the summer of 2002. U.S. Forest Service managers often have assumed that spotted owls do not utilize burned forests and have proposed post-fire salvage logging within burned owl habitat. The IBP study was the first to document how California spotted owls utilize habitat within burned landscapes. Indeed, the researchers found that California spotted owls not only can persist but actually *prefer* to forage in forests burned at varying degrees, and also can nest and roost in burned habitats. In their final report, they suggested that "our published results will be used when needed during the public review process on future post-fire salvage logging projects throughout the range of the California spotted owl, to ensure that critical burned habitats remain intact." Hence, the study was used to support a key PWC strategy for the Sierra region -- developing effective strategies to address wildfire in the Sierra and return forests to a more natural fire regime.

- **<u>Scientific basis for conserving native forests of Monterey pine</u>**. PWC funded conservation biologists Deborah Rogers of the University of California's Genetic Resources Conservation Program to study the threats facing the rare and threatened Monterey pine forests of California's Central Coast. The forests are a unique natural assemblage that is restricted to the region. Approximately 50 percent of this habitat has been lost and the Monterey pine is included on the International Union for Conservation of Nature and Natural Resources (IUCN) World List of Threatened Species. The grant supported research which led to publication of a peer-reviewed article in *Forest Ecology and Management*, a good quality international forest science journal.

  As with most other investments in science by PWC, the grant also supported outreach to translate scientific understanding into practice. The grantees organized three symposia that brought together researchers and more than 30 agencies, land trusts, private landowners and companies. According to one, "As a local government project planner working with a number of important projects which impact the Monterey Pine Forest it is important to hear of the latest scientific research related to the resource. It is also extremely valuable to network with those working on this research." The funding also underwrote Dr. Rogers' work commenting on draft plans for projects within the forests considered by the California Coastal Commission and Monterey County.

## <u>Spatial Tools</u>

PWC grants also funded the development of spatial tools and data sharing to improve the quality of information and provide a clearer picture of the type and location of acquisition and restoration projects occurring throughout the state. PWC consultant GreenInfo Network provided geographic information systems (GIS) mapping and information systems assistance to more than 42 grantees. In addition, GreenInfo Network hosted a conference in November 2005 with more than 30 users from non-profit and public agencies to assess conservation data and needs for California, and created a new GIS data set of protected lands in California, developing a framework for tracking the availability of ownership/parcel information in California counties.

Additional spatial and data sharing projects included the following:

- **<u>Update and expansion of the California Digital Conservation Atlas.</u>** The Mountains Recreation and Conservation Authority received funding for its Great Places program, which contributed to development and maintenance of the California Digital Conservation Atlas. The grantee updated the statewide public and conservation land ownership data in the Atlas and increased the use of the Atlas by 78% over the previous year. This grant was viewed as bridge funding by RLFF. Indeed, their grant write-up noted that "After the first year of operation, state agencies will support the entire project budget. RLFF funding will help ensure the program's success in its first year." Grantmakers also viewed the effort as enabling "PWC staff and GreenInfo Network to inject PWC priorities into this effort."

- **<u>Maps and models for Lassen Foothills fire management planning</u>.** The Tehama County Resource Conservation District received funding to develop spatial tools to enable them to develop a fire management plan on 100,000 acres of lower elevation land in the Lassen Foothills. TCRCD contracted with the California Native Plant Society to create a detailed vegetation map and a fire condition class map for the entire area. This includes analyzing existing data and conducting field surveys, with Aerial Information Systems, Inc. providing expertise on technical mapping. They also contracted with The Nature Conservancy to produce vegetation state and transition models that identify areas where a lack of fire is leading to ecological degradation and where the risk of severe fire is great. According to the PWC staff report, "The ultimate goal of this project is to provide detailed information regarding fire-based ecosystems that are no longer operating under natural environmental conditions, with the aim of directing improvement and restoration projects to such areas. Thus the results of this study—as they are incorporated into county fire plans—will provide necessary tools for agency land managers to improve their stewardship of wildlands in this region."

- **<u>Maps of Important Bird Areas of California.</u>** Audubon California published a 2004 report that identified 148 sites that provide critical bird habitat for one or more species of birds during breeding, wintering and/or migratory seasons. The report was one of the first systematic efforts to identify a network of important conservation sites for birds in the state and led to efforts to prioritize the areas for conservation action. PWC provided a small grant to Audubon California to enable them to work with GreenInfo Network to develop presentation quality GIS-based maps for ten Important Bird Areas, which will be used to describe the projects to landowners, partners such as Audubon chapters and government agencies, and funders.

## *Acquisition Strategies and Land Management Plans*

*9.2 PWC helped create scientifically-credible strategies for acquisition of key conservation parcels and management of those parcels once they were in conservation ownership. These strategies provided significant guidance to RLFF and its grantees, and created innovative models for landscape-scale protection of wildlands.*

Improved scientific understanding fostered the development of acquisition priorities, strategies for protecting key parcels, and management plans for acquired lands. PWC's investments in a number of projects led to better guidance for grantees and partner organizations about which landscapes to invest in and how to protect conservation values by mitigating threats. Some of these guidance documents built on science that was created with PWC support, and others relied on pre-existing data. Many of these products were helpful to RLFF itself in prioritizing grantmaking. For example, early in the program, PWC funded the Wilderness Land Trust to prioritize the state's designated wilderness areas and areas proposed for designation. This landscape analysis became part of the formula for determining where PWC would concentrate its acquisition efforts.

Grantees commented about the critical linkage between the quality of scientific information and the credibility of the strategies and plans that relied on it. Investments in conservation biology, planning, law and real estate expertise paid off, in part by enhancing credibility and trust with key partner organizations. RLFF's inducements to grantees to translate their technical information into accessible management implications were also an important element of the PWC grantmaking. According to one respondent who credited RLFF staff with successfully guiding them to produce accessible reports, "You need to be dealing in facts. But if those facts are too dry … no one will read them, and they won't use it."

## Landscape-Level Acquisition and Protection Strategies

Some of the PWC projects resulted in identification of land conservation priorities which enabled grantees to choose key parcels for acquisition and to justify their choices to others. Two sets of funded activities provide examples from the far northern and far southern parts of the state.

- **Landscape-level acquisition and protection strategy for the Smith River Watershed.** The Smith River Alliance (SRA) received six separate grants from the PWC program, and as described in Section 6, was "profoundly affected" by the program. One mid-term grant helped to prioritize and justify a major land acquisition project within the Smith River National Recreation Area, an area within the Six Rivers National Forest in the far northwest corner of the state. The SRNRA includes 450 square miles of the Smith River watershed, a portion of the Siskiyou Wilderness, and 315 miles of the river system that has been designated wild and scenic. Scattered throughout these areas are over 10,000 acres of private in-holdings, which if developed or subdivided, would have the potential to degrade adjacent protected lands and sensitive resources within the watershed.

  PWC funded SRA to prepare a land acquisition plan for the SRNRA, using existing planning documents to identify key conservation values and then apply the values to the private parcels to assemble top tier properties. As a respondent described, "PWC funded us to look at all lands in the watershed to prepare a list of what would be the priority projects for acquisition." From that assessment, they started working on a purchase agreement for Hurdygurdy Creek, which is, noted this respondent, "the last big inholding in the heart of the NRA. There are 12 miles of anadromy on Hurdygurdy. It supports spawning and rearing for coho, Federally and State listed salmonid species, as well as Chinook, steelhead and coastal cutthroat trout. It's considered refugia for salmon on its own right... As soon as we negotiated the purchase agreement, it went right to the top of the list for the Region 5 Forest Service for appropriations from LWCF funds."

- **Las Californias Binational Conservation Initiative.** PWC supported Conservation Biology Institute's involvement in the Las Californias Binational Conservation Initiative with The Nature Conservancy and Pronatura to identify land conservation priorities linking San Diego County and northern Baja California in Mexico. The goal of the project was to describe the unique natural resources and biogeographic importance of the border region, identify threats to maintaining an interconnected regional biodiversity conservation network and identify a binational conservation network that is representative of biodiversity in the most intact areas of the border region. Ultimately the effort seeks to lay the foundation for a binational park system that connects the Parque Constitucion de 1857 in Mexico to wilderness areas, forests and parkland in the U.S.

This piece of the South Coast Missing Linkages initiative led to multiple PWC-supported acquisitions, including the 1,080-acre Jacumba Corridor that will link the Bureau of Land Management land to California State Park land by adding acres to the tip of the Anza-Borrego Desert State Park. (Currently, the land is still being held by The Nature Conservancy, until the Park can acquire it.) Another 1,001 acres in this Las Californias region was acquired through the Back Country Land Trust, all through the support of PWC.

## Management Plans for Key Conservation Parcels

Wildlands protection is partly a matter of ownership and partly a matter of how a property is managed after it is acquired. Many of the land acquisition projects involved deed restrictions and donation agreements that specified monitoring work to check on the long term viability of the properties. Others – particularly larger properties -- require more active management. While RLFF invested more in land acquisition and building the capacity of organizations that were involved in their acquisition and eventual management, some grants led to the development of management plans that should help in maintaining key conservation values.

- **Management plan for the Ireland Ranch adjacent to Berryessa Peak.** Tuleyome received significant funding from PWC to acquire the Ireland Ranch adjacent to the BLM's Berryessa Peak parcel in western Yolo County. While the BLM owned 9100 acres around the Peak, it was inaccessible because adjacent landowners restricted access. In addition to its recreational value, the region has significant biological importance with oak woodlands, chaparral, and serpentine soils that provide habitat for hundreds of plant and animal species. The Blue Ridge itself is a corridor connector between Putah and Cache Creeks and the region is part of the California biodiversity "hot spot."

  Once purchased, Tuleyome began development of a management plan for the 640-acre parcel. "We intend to participate in regional decisions as land owners and stakeholders to fulfill our dual mission," commented the grantee. "Current land uses will continue while we develop a management plan, and we hope to be friends and good neighbors with other Blue Ridge landowners." The Ireland Ranch is currently grazed and seeking organic certification. "One of our first tasks was to develop a management plan for the ranch to address conservation, agricultural, cultural and recreational issues. The Ranch and the region offer important and unique educational and recreational opportunities as well as a place for unique scientific studies that we look forward to developing." A draft management plan was completed in December 2006.

## *Identifying Landscape-Scale Linkages*

*9.3 One of the more significant impacts of PWC's grantmaking was the identification of important landscape-level linkages needed to secure functional connections between existing wildland reserves to maintain landscape level ecosystem processes, including movements of wide-ranging species.*

While it is important to protect wildlands as areas of open space and repositories of spiritual values and recreational opportunities, an equally important role of wildlands is to maintain ecosystem processes that are vital to the current production of services such as clean water, critical to the survival of important species of plants and animals, and needed in order to facilitate adaptation to climate change. One of the best ways to assure protection is to think and act at a landscape-scale, and one of the more valuable components of PWC projects were their focus on landscape-level linkages between existing wildlands reserves. Protecting corridors also strengthens the integrity of existing conservation areas by reducing urban and suburban encroachment and minimizing fragmentation and edge effects.

RLFF invested in efforts to map important corridors and linkages across California, which in some places has provided guidance for creating reserves and re-crafting General Plans for urban areas. Identification of key corridors has also helped unite disparate land protection activities and has provided spatial images that are compelling and mediagenic.

- **Missing Linkages in the South Coast.** PWC supported completion of five habitat linkage designs in the South Coast region as part of a collaborative South Coast Missing Linkages initiative. PWC funded South Coast Wildlands (SCW) to complete linkage designs which draw on spatial analysis and identify recommendations for freeway crossings and management prescriptions for adjacent lands. These linkages were viewed as forming "the backbone of a conservation strategy for southern California where the whole would be greater than the sum of the parts," according to an SCW report.

  These SCW linkage designs (Figure 9.1) were developed through a series of workshops involving 126 agencies, academic institutions, planners, conservation groups and community groups. The designs were shared with agencies and organizations in each linkage area, and have since been incorporated into a number of state and county planning efforts, including the California State Wildlife Action Plan, the Southern California Association of Governments regional comprehensive plan, the Riverside and San Diego county general plans, and Los Angeles and Ventura county planning efforts. "The more people know about it, the more it will get implemented, and that's exactly what we saw happen," one respondent explained.

  The linkage designs were viewed by a number of respondents as an important and credible source of planning guidance for conservationists and agencies working in the area. A U.S. Geological Survey ecologist referred to the PWC-supported San Gabriel-San Bernandino linkage design report in his letter to a to U.S. Forest Service ranger regarding a road widening project within the San Bernandino National Forest. He cited its "excellent discussion about the effects of roads and wildlife and recommendations for mitigation" and concurs with the studies' assessment of proposed mitigations. As a result of partnerships formed during the planning and implementation of this and other PWC-supported linkage designs, South Coast Wildlands has committed to working with the Department of Defense, the National Park Service, and the Fish and Wildlife Service on future conservation planning initiatives in California and nearby states.

SCW was funded to develop an interactive online digital mapping application. Over time, SCW hopes the tool will help the organization overcome one of its most significant challenges: "Even though there is activity happening, everybody doesn't know what everybody else is doing, so it's kind of harder to strategically plan for acquisitions and conservation when you don't know what your neighbors are doing." When complete, the online mapping guide will allow registered users from agencies and conservation organizations to conduct custom queries, download and print data and maps, and track acquisitions and linkage protections. In this way, the project will enable coordination and collaboration among the many organizations involved in landscape-scale protection.

In many ways, SCW provides a great model of the kind of organization that was a good investment for PWC: committed to on-the-ground change that secures landscape-scale protection yet grounded in good quality scientific expertise and the ability to communicate this information. And RLFF used its multi-year and multi-strategy approach in working with SCW by providing three project grants and one capacity-building grant to enable them to fine tune their organizational direction, launch a marketing strategy and develop a broader customer base for conservation analysis.


***Figure 9.2: Missing Linkages as articulated by PWC-grantee South Coast Wildlands***

## *Enabling Participation in Public Planning Processes*

*9.4 PWC also enabled wildlands advocates to participate in important public planning processes at the county and federal levels. By helping to keep wildlands interests "at the table," PWC made it more likely that conservation objectives will be codified in these plans. Most planning processes take a long time to reach a conclusion, however. As a result, ongoing advocacy is critical to future conservation success but somewhat mismatched to PWC's need to demonstrate short term wins.*

PWC supported a number of conservation organizations to provide input to public plans, by participating in forums, comment periods, and appeals processes. This engagement enabled grantee ideas to be integrated into public plans, not just organizational ones. "Allowing groups the ability to participate in public planning processes, as opposed to just doing their own plans, is important," one respondent explained. PWC supported organizations to participate in county-level public planning processes, as well as public lands management planning.

### County Planning Processes

The Strategy Book noted a significant challenge in terms of county-level attention to conservation goals. "Throughout California's rural counties, elected officials are decidedly anti-conservation, which creates barriers for organizations seeking to secure increased wildlands conservation in rural areas." Respondents echoed this sentiment, acknowledging that where county plans can be improved, conservation success is more likely. "Unfortunately, most of these plans are county-wide or portions of counties and they don't always look outside their planning boundaries. So the intent of the act isn't always met, in terms of regional planning," explained one respondent.

Over time, the PWC program gave increased attention to county planning by funding organizations to participate by developing alternative visions or alternative pieces of the plans. With early work in Humboldt County, the program ultimately became involved in planning initiatives in Amador, Calaveras, Orange, San Diego, and targeted counties in the Sierras. All of these processes have taken a very long time and require ongoing investment by conservation advocates.

- **Humboldt County General Plan Update.** PWC made five grants to organizations and consultants working to inject wildlands considerations into the Humboldt General Plan Update. In 2003, PWC funded Michael Smith and Steven Steinberg at Humboldt State University to analyze existing infill potential of vacant and underutilized lands in Humboldt County, develop alternative growth scenarios and conduct a public education campaign. The expectation was that the infill analysis would show that the county could continue to grow, without consuming its open space. PWC also funded the Humboldt Watershed Council and consultant Terry Watt to carry out analysis and outreach so as to have more effect on the outcomes of the planning process. HWC helped to create a Healthy Humboldt Coalition involving conservation, affordable housing and healthy lifestyle groups.

While the General Plan Update is still not complete, the Board of Supervisors selected an alternative that allowed new development at urban densities and only in areas served by sewer and water, thereby protecting 10,000 acres of resource lands from development. According to the HWC, "This has been an excellent achievement for the Healthy Humboldt Coalition, as all of the worst-case development scenarios have effectively been taken off the table. Though certain provisions of Plan B still require attention, we now have the opportunity to continue working to achieve the best-possible general plan, rather than just fighting to prevent the worst."

- **<u>Calaveras County Growth Planning.</u>** Similarly, PWC has funded the Ebbetts Pass Forest Watch (EPFW) to organize citizens and advocate for a General Plan Update in Calaveras County that includes preservation of open space and wildland habitat. Calaveras County is one of the fastest growing counties in the Sierra Nevada, having seen a doubling of population since 1980. Oak woodlands and forests are being converted to residential use. Habitat is being destroyed, and the buffer between developed areas and wildlands is shrinking. Formed to oppose clearcutting by Sierra Pacific Industries, EPFW has evolved into a broader set of strategies to protect and restore healthy forests and watersheds to maintain a high quality of life in the Sierra Nevada.

  In mid-2005, EBFW launched a Community Action Project (CAP) to address county land use issues and to provide Calaveras County citizens with an organized and coordinated way to become involved in the general plan update. They received PWC grants in 2006 and 2007 to support the work of a coordinator, sponsor regional town hall meetings to increase public understanding of the general plan, and conduct opinion surveys to better understand the interests of citizens. They also proposed to develop a database that tracks private, industrial, and commercial development plans in the county. EPFW and the CAP have partnered with the local newspaper to advocate for the general plan update, and gained the support of several county supervisors. The Update process was scheduled to run from mid-2007 through mid-2009, and a draft baseline assessment has been completed. While it is difficult to know the impact of the CAP on the process, in the initial community workshops, "open space" and "natural resources" were rated highly by most participants as community assets.

- **<u>San Diego County General Plan and TransNet Implementation.</u>** Following passage of the TransNet sales tax in 2004 [described in Section 7], PWC grants to the Endangered Habitats League (EHL) shifted to ensuring that TransNet dollars were invested in appropriate wildlands conservation projects. They did this in two primary ways. First, they worked to strengthen San Diego County's General Plan update with an emphasis on conservation of wildlands. Second, they leveraged TransNet funding toward purchasing open space. According to one respondent, "The TransNet provides the money to buy the land. And the General Plan gives you an underlying land use plan so that you can do more effective conservation. … That general plan is going to transform planning in San Diego." To what extent has PWC support been critical to this change? "The fact that the General Plan is going to be such an improvement is because we've been at the table. We've had more of a role to play in that than practically any other stakeholder, and PWC provided most of our support to do that."

## Federal Public Lands Planning Processes

Public land management agencies set direction for lands they control through an extensive set of planning processes, which increasingly are set up as fairly open and collaborative. However, the degree to which these processes produce gains for conservation depend on the degree to which informed and effective wildlands advocates are engaged. Hence, public lands planning processes present a huge opportunity for conservation interests to influence direction, but only if they can sustain their participation over long planning horizons. PWC supported several groups to provide input in federal lands management planning processes. While few of these are conclusive, the engagement of informed groups can produce real changes in direction that would not come about without their involvement.

- **Lake Tahoe Basin Management Planning.** PWC funded the Snowlands Network to participate in several Forest Service planning processes. Based in Nevada City, California, Snowlands advocates for non-motorized winter recreational use in the greater Lake Tahoe area and the northern Sierra. PWC funds were used to hire the organization's first paid employee and purchase equipment. These investments enabled the group to participate in the Lake Tahoe Basin Management Unit's "Pathway 2007" Plan, including recommendations for limiting snowmobile noise. They also supported work on the Calaveras (Bear Valley) Winter Recreation Plan, Tahoe National Forest's OHV rule-making, and the Hope Valley Alpine County Winter Recreation Plan. They also worked toward a winter use policy for 11,000 acres adjacent to the proposed Hoover Wilderness Addition.

## *Building Multiparty Partnerships*

*9.5 Landscape-scale conservation requires partnerships among diverse agencies and groups. PWC investments helped build some of these multiparty collaborative groups which provide structures for landscape-scale decision making and action.*

As discussed in Section 6, PWC grantmaking helped to build valuable networks of organizations through coalitions like the CWHC and the CCLT. In some places, PWC funded efforts to build multiparty place-based partnerships. In most cases, these were informal networks developed to advance a specific conservation objective and funded through a lead organization. They can be viewed as efforts to mobilize a broad constituency as an indication of public interest in conservation activity; alternatively, they can be seen as alternative governance processes, where decisions can be developed which cut across the geographic, political and organizational fragmentation which characterize most conservation areas. Ultimately, these kinds of public-private partnerships are necessary to implement a landscape approach to conservation

- **Blue Ridge Berryessa Natural Area Conservation Partnership.** The Blue Ridge Berryessa Natural Area (BRBNA) spans five counties and two watersheds and includes 600,000 acres of ecologically diverse wildlands, rangelands, and aquatic habitat. More than 290,000 acres of the region is public land, primarily owned by BLM. The other 310,000 acres are privately owned, and most are in the form of large ranches. The Nature Conservancy identified the BRBNA as an extremely important area for biological diversity, with key ecological community types, including blue oak woodlands, valley oak woodlands, northern mixed chaparral, serpentine bunchgrass, northern cypress forest, and vernal pools. The region includes over 220 miles of rivers and waterways, including Cache Creek, a PWC special opportunity area.

PWC funding enabled several key acquisitions in the BRBNA; equally valuable was their support of the BRBNA Conservation Partnership, a voluntary, collaborative group comprised of 75 partner organizations including non-profit organizations, private landowners, public land managers and residents. The mission of the Partnership is to promote the conservation and enhancement of the BRBNA landscape by encouraging the sensitive management of its wild, agricultural, recreational, archeological, and historical resources. Six of the ten grants given by PWC in the BRBNA were to organizations that were members of the partnership.

One of the grants was made to the Land Trust of Napa County (LTNC) to build the capacity of the BRBNA partnership through development of a science-based regional conservation framework. LTNC also conducted workshops around the region to introduce and gain feedback on the findings. The underlying goal of the work was to ensure broad participation through a collaboration of many different stakeholders and create effective relationships and collaborative partnerships. Over 400 individuals participated in meetings, workshops, and outreach activities. These individuals represented a wide variety of stakeholders, including agency personnel, environmentalists, residents, recreational users, and landowners.

According to one respondent, the PWC funding of the framework's development was "catalytic" to the partnership. "It's basically a monthly opportunity for the Bureau of Land Management, the Bureau of Reclamation, State Fish and Game, County officials, private landowners and nonprofits all to get together. [The funding] enabled us to focus more on priorities. We went from a coffee klatch where the whole intent was to get together once a month to something that had a mission and had priorities for biodiversity preservation, recreation access and working landscapes. It's been instrumental to focusing the group."

The work of organizing the partnership and developing a collaborative framework was challenging. It was a slow, iterative process that often resulted in conflict between various groups. LTNC found that the more specific the recommendations in the framework and the identification of priorities, the higher the chance of differing opinions. Simply getting people to the table was a long, labor-intensive process that was especially difficult to sustain with volunteers. Landowners were the most challenging stakeholders to reach, and required a well-thought out, tailored approach; the involvement of other participating landowners provided incentive. Public agencies were also difficult to engage, and LTNC found that they needed strong incentives for involvement. The interdisciplinary nature of the activities required a large range of expertise. Upon reflection, LTNC pointed out that it would have been preferable to set up peer review panels earlier in the process to guide the framework.

Collaborative efforts often take longer to produce results because relationships need to be built and the interests of so many parties need to be accounted for; hence, these kinds of efforts may not have been the best match to the five-year focus of PWC. Nevertheless, according to some respondents, the partnership is helping to advance voluntary, collaborative conservation strategies, partly by "giving us some credibility in Sacramento at the state level," and partly by providing a scientifically-credible structure for landscape-scale decision making.

## *From Science to Plans to Action*

*9.6 In understanding the strategic connections between good information, well-articulated plans and the ability to secure protective action, PWC recognized that conservation results require a multi-year and stepwise commitment.*

While conservation action does not result directly from investments in science, plans or processes, all three of these activities are part of a stepwise movement that can ultimately result in protective action. Information enables the development of strategies and plans; planning mobilizes supporters and funding; and ultimately, the implementation of plans can create wildlands protections. By being able to support multi-year grants and linked activities, PWC helped to fuel this process. All indications are that grantmakers understood the strategic connections between a variety of activities, organizations and conservation outcomes, and how they link through time to produce protection.

Perhaps one of the best examples of these strategic, stepwise connections comes in the work leading to protection of the Tejon Ranch, described at the beginning of this chapter. The PWC-funded scientific assessment of the Ranch by the Conservation Biology Institute enabled development of a subsequent PWC-funded reserve design by CBI and South Coast Wildlands. As described by one respondent, "It was the early support that we got from PWC that really allowed us to produce products that got people excited about it. And so it began to take on a life of its own."

That momentum included a variety of negotiations involving PWC-funded organizations and RLFF staff with the Tejon Ranch Company. RLFF refused to support earlier "bad negotiated efforts," convened differing groups interested in or working on protecting the ranch, actively engaged in the negotiations and helped draft agreements. They supported the Endangered Habitats League, Audubon, Terry Watt of Terrell Watt Planning Consultants and David Myerson of the Resource Opportunity Group to provide scientific, economic and legal input to the negotiations. "When a settlement is reached, it will be the product of an analysis and negotiation process – supported at several points by PWC – that has been far more efficient than the alternative scenario of environmental impact report comment, legal action, and public relationships campaigns," described one grantee. Another noted, "That might be something to look at as a model [for future projects] where you do some basic scientific work, and then it takes off."

In this case, the science and negotiations ultimately led to the deal to protect most of the Ranch property, which links the southern Sequoias and Sierras to the Los Padres National Forest. "There is still more to do in terms of conservation in that linkage, but essentially at least the backbone of the connection is done," said one respondent. RLFF is continuing to work to secure public funding for the property along with creation of a nonprofit organization capable of protecting the Ranch's resources while ensuring appropriate public and scientific access.

Similarly, multiple linked investments in scientific research, litigation, advocacy and community forest management in the wildlands-urban interface areas of the Sierra enabled the Sierra Nevada Forest Protection Campaign (now Sierra Forest Legacy) to generate and organize credible scientific arguments, develop media and outreach campaigns and push back on unscientific and politically-motivated rulemaking changes. These actions led to judicial victories that give SFL and others time to wait for Federal political shifts and build a case for more sustainable community-based forest management. That work includes promoting alternative economic activities and working with homeowners on wildfire safety measures. The campaign orientation of RLFF staff served them well in understanding these step-wise linkages between a range of activities at different scales and levels of government. The opportunity to invest over five or more years certainly supported this strategic perspective.

Another example of this long-term, multi-prong approach can be seen in PWC investments in the Puente-Chino wildlife corridor, which extends from the Santa Ana Mountains to the San Gabriel Rivera. PWC first funded a CBI assessment of the property in which they conducted spatial analysis and identified high priority areas for connectivity and the impediments to maintaining it. PWC also funded CBI's involvement in a county-wide transportation tax which successfully sequestered more than $243 million for open space protection, and it is expected that a significant chunk of these funds will be used in the Puente-Chino Hills corridor. "There's this circularity to it," a grantee explained. "There's a study that lays the basis for conserving land in this landscape. There are funds that have been generated – partially because of PWC support for remaining active in that regulatory process. Now we can synergistically go out and protect land."

Critical to these stepwise strategic moves are the transitions between activities, and RLFF appears to have helped promote these connections. For example, most science and tool development grants included funding for distribution of reports to target audiences, such as local organizations working toward land conservation and local elected officials. In many cases, getting the information in the target audience hands was just as important as having completed science in the first place.

Given the stepwise nature of these sets of activities, it is unreasonable to expect that many of the PWC investments in science and planning would produce significant changes within a five-year project life. Alternatively, greater levels of impact from a number of grants should be evident over time. For example, in the San Joaquin Valley, PWC supported Great Valley Center's work with eight councils of government on a sustainable regional development plan, most prominently the San Joaquin Blueprint, which focused on regional patterns of land use and transportation. Unfortunately, as of June 2008, the wildlands conservation information is "not being incorporated in any major way into the [regional] planning process," a respondent said. "The wildlands part of the work doesn't have any advocates right now." To the grantee's knowledge, the regional planning process has not resulted in any new open space protections. However, she was hopeful that as the project moves to a larger scale, the information will be useful. “Having it on the record is an important part of what we accomplished, and that’s the first step.”

Funding for long term planning and implementation of key strategies is clearly important to realize the full benefits of investments in science and plans. Implementation activities are particularly challenging to fund, according to several grantees. “Implementing is diffuse and nebulous. It’s not one thing that you can go to somebody and say, hey, I want to do this. It’s really just staff time to go to meetings, talk on the phone, to do all the stuff that goes into making conservation happen,” explained one respondent. “It’s hard to even describe it in a grant, particularly for our organization, since we are not out buying property…So it’s this multi-prong approach when we get to the implementation phase, and it’s difficult for us to fundraise for those implementation activities.”

## *What about Climate Change?*

*9.7 Although climate change was not identified as an explicit threat to wildlands in the 2004 Strategy Book, several climate change projects were funded later in the program and other funded activities will help in adapting to climate change.*

Although climate change science was not an explicit focus of the early PWC program, several climate change-related projects appeared in the second half of the program. These grants included scoping projects by PWC consultants to better understand the linkages between climate change and wildlands. A few additional projects focused on the science that links wildlands management to greenhouse gas emissions, with others targeted on planning and policy analyses and conferences that expose decision makers to current thinking about climate change.

- **A Regional Approach to Hydropower Relicensing Considering the Impacts of Climate Change.** Through several grants starting in 2006, PWC funded the University of California at Davis Watershed Center in cooperation with the PWC-supported California Hydropower Reform Coalition to explore ways to update the way that hydropower dams in the Sierra are regulated. Currently, dams are relicensed by the Federal Energy Regulatory Commission on a facility-by-facility basis for 30-50 years in duration, neglecting the fact that dam operations have regional-scale impacts and conditions will change significantly in the future. The Watershed Center undertook legal and institutional analyses to understand how a regional (system-wide) and more adaptive process could be employed. Researchers at the Center also developed and applied physical and biological models to analyze the impact of hydropower operations on ecosystem health, and to forecast changing river conditions caused by climate change. A series of workshops are anticipated to share the results and tools with NGOs and agencies. The researchers expect that the project will help “reform dam relicensing in the Sierra to maintain and enhance native aquatic systems, wildlands, and broader watersheds in the face of climate change.” The forecasting tools may also help land trusts determine which parcels of land are most critical to acquire to protect watershed health in the future.

- **<u>Wildlands Fire Management and Carbon Sequestration.</u>** In a 2008 study funded by PWC, Scott Stephens at the University of California Berkeley is examining the connection between fire, fire management and carbon sequestration. Some people have argued that the best way to sequester carbon for greenhouse gas reduction purposes is to plant trees at high density, grow them for 40-80 years, harvest them and make wood products and then plant and do it again. This is very similar to the management regime that was used on federal lands in the 1980's, with significant environmental and human costs. This study examines how both fire and fuel reduction treatments affect total carbon storage, in relation to changes in wild fire behavior. Its goal is to determine which combinations maximize carbon storage and lower wildfire risk as guidelines to future forest management for carbon sequestration purposes.

- **<u>Land Use Planning and Greenhouse Gas Reductions.</u>** In late 2006, Gov. Arnold Schwarzenegger signed Assembly Bill 32, which set a target for reducing the state's greenhouse gas emissions back to 1990 levels by 2020 – a reduction of approximately 25%. The bill specifically calls upon California's executive branch to use market-based mechanisms. One of the most contentious aspects of AB 32 implementation is its application to land use. The governor's Climate Action Team report concluded that 18 million tons of the planned reductions in emissions, or about 12% of the total by 2020, will have to come from changes in California's land-use patterns. Most experts have suggested that it is difficult, if not impossible, to integrate land use change into a "cap-and-trade" system. Developed through a PWC grant to the Solimar Research Group of Ventura CA in the last quarter of 2007, this white paper explores a scheme for integrating land use into the air pollution regulatory system for the purpose of reducing greenhouse gas emissions. As the authors note, "Some of the ideas in this paper may be unrealistic; some may be unwieldy; and some may not be economically feasible. … It is simply our intent to put some new ideas on the table for discussion."

- **<u>Informing Judges about Models Used to Link Climate Change with Water.</u>** PWC funded a training carried out by Tucson-based Dividing the Waters, a collaboration of judges, special masters and referees who preside over western water cases. Dividing the Waters ran a two-day workshop in Boulder, Colorado in May 2007, which reviewed Western climate trends and the models that can be used to link climate and hydrological changes. The goal of the workshop was to help judges understand the nature of the evidence and the testimony of experts that may be presented in future Western water cases, with the expectation that more informed adjudicatory processes would lead to better protected aquatic systems and wildlands.

Other activities funded by PWC should help deal with climate change adaptation. Changes will exacerbate wildfire and drought problems, and some of the projects that are dealing with these issues (such as the work by Sierra Forest Legacy on community wildfire planning) should help with a future with higher risks of catastrophic fires and water shortages.

As discussed earlier in this chapter, projects that promote landscape-scale planning help to move the discussions of conservation and development into the right scale of thinking. As one respondent noted, "I think inherent in a lot of these landscape-scale conservation planning efforts that we've been involved in is that it's going to facilitate adaptation to climate change by protecting these big hunks of open space." Assemblages of large contiguous blocks of landscape and corridors between blocks of protected lands are also clearly needed as adaptation strategies, and many of the acquisitions that PWC supported create movement toward these assemblages. As another respondent indicated, "The reserve systems that we're putting together were not designed with climate change in mind at the outset. But now people realize that if you have interconnected systems that have a range of elevations, those are the same things you would do if you were trying to help wildlife through climate change."

While the explicit attention to climate change mitigation and adaptation might have been somewhat late in the PWC grantmaking cycle, the approach taken by RLFF of funding research, white papers and trainings/dialogues seems to be the right strategy as a transition out of the PWC funding. Hopefully, by exploring and clarifying the link between climate change, greenhouse gas reductions policy, and wildlands conservation, PWC will create a foundation for more aggressive work in the future. Future acquisition projects that protect large blocks of habitat and key linkages between those blocks can use climate change adaptation as a lever for prioritizing wildlands protection. It is also possible that carbon markets may generate significant funding for carbon sequestration and restoration activities with significant implications for wildlands management. Finally, the move to renewable energy production is placing new pressures on undeveloped lands, and may well pit environmental groups against each other.

Investments in science, tools, plans and planning processes are in some ways less visible products of the PWC program, and at times their conservation outcomes are less evident. However, they created a foundation for success by some of the other program strategies, including land acquisitions and policy work. They may well be a "gift that keeps on giving," because credible information and visionary, inclusive plans can fine tune the approaches of wildlands protection advocates and bolster their arguments.

# - 10 -

# TOWARD FUTURE WILDLANDS PROTECTION

***What do the experience with PWC and the perspectives of PWC grantees suggest about future programs for wildlands conservation and protection?***

While the bulk of our work involved looking back at the history and accomplishments of PWC, we had the opportunity to ask respondents about their perspectives and advice about future wildlands conservation programs, in particular, what they perceived as the most pressing needs and opportunities. We asked them to imagine they were a philanthropist interested in funding a comparable program: In what would they invest? The overwhelming initial response was "more of the same." Some identified specific elements of the PWC program as particularly important. Others simply pointed to the breadth of objectives of the program and indicated that five years of work was just a start on achieving many necessary outcomes. Most respondents pointed to a handful of potential program refinements and expansions; few of these conflicted with the overall directions taken by PWC.

*"I'd do an awful lot the same."*

*"I've seen instances where lands are 'protected," but at the end of the day, our ability to manage them becomes really difficult."*

*"It makes a huge difference having good people. … We need more boots on the ground."*

In this section, we summarize their advice. Embedded in many of these suggested strategies are subtle shifts in an exclusive focus on wildlands per se to work on many of the stresses or problems that threaten the integrity of wildlands – in particular, changes in land use, water, energy production and climate change.

## *Strategies and Activities*

### Overall Objectives

1. Do "more of the same." Almost all of our respondents felt that *all* of the strategies employed by PWC were important, and simply continuing the program in its current form was needed.

2. Continue to focus on wildlands. Some respondents felt that the PWC focus on wildlands was a unique and important niche that is not well covered by other foundations. According to several, the PWC emphasis on wildlands protection was more effective at achieving landscape-scale conservation than open space or smart growth initiatives, which seek to minimize the spread of sprawl rather than protect undeveloped land. Others disagreed with an exclusive focus on wildlands, as noted below.

## Land Acquisitions

1. Keep targeting land acquisitions.

   While there is only so much land that is likely to be bought for conservation purposes, it makes sense to continue to acquire land that is strategically-located in terms of its ecological value. Several respondents noted that there is a 5- to 10-year window for conservation acquisitions in California. Much longer than that and the population, growth and development pressures will have fragmented most key areas.

   - Keep purchasing small parcels ripe for development. Interviewees particularly noted those parcels that are inholdings within or adjacent to protected areas or potentially protected areas. "Cleaning up" wilderness study areas will facilitate passage of future wilderness bills and make management of blocks of protected area much easier.

   - Keep expanding the amount of lands in public ownership. One respondent felt that the focus in land conservation has shifted to private lands, yet it is still important to expand the public land estate.

   - Continue work with the BLM and the Desert lands it controls. Several respondents felt that it was a critical time for publicly-owned Desert lands, given the pressures for renewable energy development and the location of solar and wind resources on public lands.

   - Focus on conservation linkage areas. PWC acquisition strategies increasingly focused on key corridors and linkage areas within California, and several interviewees commented that those are exactly the areas on which to focus. Several linked corridor protection to the opportunity for adaptation to climate change. One commented that "we need to have breathing room to expand."

   - Create long term human capacity and financial endowments to ensure that land acquisitions reach closure. Building relationships to seek out willing landowners and having funding available when they are ready to sell are critical to the success of a long term acquisition program.

2. Expand areas and types of land acquisition projects.

   While respondents were pleased that wildlands were protected under the PWC program, most pointed to the wave of development occurring across California and shifts in the management of less-pristine lands that will heavily affect wild spaces. They argued that protected areas are only protected on paper: that air pollution, traffic and habitat loss affects the integrity of the protected areas in higher elevation land. It was felt that an expanded program should focus on these transitional areas to provide better functional protection to wildlands.

   - Undertake more work on the areas that buffer wildlands from the impacts of development. Some commented about the importance of controlling growth in the Central Valley and the Sierra Foothills to ensure the integrity of public lands in the

Sierra. Creating Purchase of Development Rights or Transfer of Development Rights programs that incentivize protection, providing tax relief for undeveloped lands, and purchasing grazing or water rights as a means of controlling development are important options for influencing the threats to wildlands from these areas.

- Influence the character of working lands as valuable transition areas and buffers. In some areas, working timberlands and agriculture provide important ecosystem services and buffer impacts of more intensive development on wildlands. Purchasing the larger blocks of industrial timberlands as they come on the market is a priority, as are acquisitions of partial rights to land which may allow for some use in exchange for reductions in the kinds of development that truly threaten wildlands.

- Look for targeted acquisitions within urban areas. Several respondents pointed to the value of conservation acquisitions within urban areas in southern California, the Central Valley and elsewhere. Work on urban river corridors in particular was an evolving focus area for PWC constituency-building work, and using targeted acquisitions of park land and open space along urban rivers may help create a longer term constituency for wildlands protection by building connections to Latinos and inner-city residents

## Restoration and Stewardship

1. Expand work in the area of restoration and stewardship of lands.

   PWC did have a restoration component, but according to program officers, it was hard to find grantees that could do the work, and harder to place boundaries on what work was most important. Nevertheless, many respondents noted that placing land in protected status does not assure functioning wildlands, and that protected lands may require restoration and a more active form of stewardship than is usually associated with the concept of wilderness. A common refrain was that "it is important to invest in acquired lands, not just buy them."

   - Fund active restoration projects. Projects that reduce erosion, deal with off-road vehicle damage, and work to diminish populations of invasive species are all appropriate for enhancing the ecological values of protected wildlands. Many of these projects can be carried out in ways that involve volunteers and job training that create capacity for on-the-ground, community-based stewardship.

   - Ensure that public land management focuses on protecting ecological integrity and key ecosystem processes. Most public land units have planning processes that govern management direction. Ensuring that those plans protect key functions and, over time, create larger blocks of wildlands is important, as is ensuring that land managers have the resources to manage lands properly.

   - Focus more on community-based restoration work. Several respondents highlighted the importance of place-based projects. Such work provides a basis for local conservation organizations to develop relationships with members of the community, and to develop understanding of community needs. Such work can demonstrate respect for local culture and build support for future protection activities.

- Demonstrate good behavior and the successes that it can engender. Several people pointed to the power of projects that provide proof-of-concept and demonstrate more sustainable ways of managing and using land. One argued that it was important to "show, not just say, how we want public land management to take place." Another underscored the need to proactively develop templates and guidance for effective public land management, particularly in response to threats posed by climate change, rather than just waiting and then finding fault with agency directions.

2. Invest in more systematic monitoring of wildland areas, and the landscapes and natural and human forces that influence them.

## Science and Planning

1. Expand investments in the creation of new "apply-able science" and tools.

   While not a major component of the PWC program, grants that developed new knowledge and disseminated it strategically to decision makers and advocates had a significant impact in framing acquisitions and policy work. Some respondents argued that policy advocacy work should be coupled to the creation of new knowledge that provides direction and builds support. A couple of areas highlighted by interviews were to:

   - Fund work on landscape change. One respondent asked for the development of better models linked to spatial imagery that describe how landscapes will change over time, particularly as climate patterns shift. In his view, such information would be important for choosing future wildlands protection strategies and would contribute to compelling advocacy campaigns.

   - Develop models of more sustainable resource management. These can be used to inform and empower public and private land managers.

2. Invest in local and regional planning as well as the local politics that determines land use decisions.

   Smart growth policies, zoning ordinances and other local-level policies affect the density of development in urban and exurban areas, and can promote higher density and lower sprawl patterns of development. Ultimately these reduce habitat conversion and fragmentation, but they require engagement in local level planning processes.

   - Fund environmental groups to participate in county-level planning processes. As one respondent noted, "Major land use decisions in wildland areas are done by county governments, and they are enormously powerful. Yet the conservation community has very little political activity at that level."

   - "Get political." Invest in strategies that result in change in elected leaders in key counties, said one interviewee. Another pointed to a need to encourage donations that include a taxable increment that would support political activity.

## Capacity-Building

1. Continue investing in organizational capacity-building.

   Many respondents noted the unique role that PWC played in supporting the core organizational activities of many conservation organizations across California. Few philanthropic organizations do this, and government respondents noted that it was hard for agencies to invest in NGO capacity-building, even though they are often dependent on NGOs as working partners. In particular:

   - Invest in people. A number of respondents reminded us that "talent matters." Having high functioning teams of people engaged in policy change and land acquisition requires high functioning people. For NGOs, that means having management and development skills similar to those that PWC's capacity-building grants helped provide. Some pointed to the need to expand technical capabilities so that conservationists have a better understanding of land and ecosystems as dynamic entities, with a more sophisticated understanding of ecological processes. Others pointed to the need to build the pool of professional capabilities, particularly in rural areas, that will enable conservation groups to weather transitions in staff and leadership positions.

   - Provide unrestricted core funding. Many grantees were afraid that their efforts to run after project-level support would undermine their ability to spend time on long term sustainability, and would control their agendas too much.

   - Invest in local-level land trusts. PWC had considerable success in seeding the development of land trusts in key localities. Local connections, along with "more boots on the ground," help build capacity and the relationships needed to achieve conservation outcomes. One respondent, however, noted that this kind of work should be done carefully, as you do not want to overbuild the land trust movement by creating small competing organizations that cannot support themselves.

2. Expand capacity-building strategies

   - Provide more training opportunities. Mainstream environmental organizations and community groups need skills in being more effective at outreach, media work, communications and negotiation strategies. Mentoring and coaching opportunities for executive directors engaged in strategic planning and fundraising were also seen as important.

   - Help to create endowment funds for key organizations or certain acquisitions. A number of respondents highlighted the value of consistent, sustained funding for core functions, and suggested that the creation of endowments would help to assure the sustainability of some organizations. Others noted the need for ongoing monitoring and stewardship work associated with certain land parcels and suggested that donations include set-aside funding for long-term maintenance.

- Support more community building and shared learning among grantees. Many of our interviewees indicated that they would benefit from more peer-to-peer learning opportunities, and that the experience from PWC should be shared broadly.

## Public Policy Changes

1. Continue work on wilderness and wildlands policy.

   A number of respondents noted a range of continuing opportunities for expanding federal and state wilderness areas, along with the management of greater areas of public lands as wildlands.

   - Support more work at passing district-level bills. Some respondents felt that the successes in the North Coast and Riverside County create a window for legislative successes in other districts. They felt that members of Congress that feared wilderness issues have been influenced by the demonstrations of constituent interest associated with recent district-level bills.

   - More work to set up a statewide bill. Others pointed to the need to keep teeing up a statewide wilderness bill so that it would be available if a political window opens, for example, by Senator Boxer concluding it would be a legacy item for her, and/or through changes in the Administration.

   - Continue RLFF's deal-making role. Several respondent familiar with the political environment credited RLFF's deal-making, connections with politically- and financially-influential individuals and investments in Republican lobbyists in the wilderness policy battles with many of the positive outcomes associated with the PWC program. They argued that a number of the RLFF contacts were beyond the reach of regular conservation groups and that having intermediary organizations like RLFF was critical to their effectiveness.

2. Expand work on related policy issues, in particular, energy development, water and climate change.

   Wildlands are not islands of protection but are affected by a range of threats and problems that in turn are regulated by a diverse set of policy instruments. Many respondents noted that the key threat to California wildlands is the rate and pace of development. Much development is taking place on private lands in close proximity to public lands or in urban areas where demands for water, energy and recreational opportunities threaten wildland areas. Hence work on a range of policy topics is needed to assure long term protection of undeveloped lands.

   - Support policy work related to energy development and renewable energy planning. A number of respondents in the Desert areas pointed to the pressures for development of BLM lands due to the changing economics of energy. They feared the "glassification of the desert" and felt that there is a critical window of time to act to offset these pressures.

- Support policy work on water availability and its connections to watershed areas. A number of respondents suggested that water supply was a burgeoning issue in California and would place pressure on areas that store and regulate the flow of water.

- Support policy work on land use and growth management. Smart growth policies, zoning ordinances and other local-level policies affect the density of development in urban and exurban areas, and can promote higher density and lower sprawl patterns of development. Ultimately these reduce habitat conversion and fragmentation that threaten wildlands. One respondent also pointed to the importance of transportation and transit policies to future development patterns.

- Focus on climate change, greenhouse gases and their connections to wildlands. There are many opportunities and liabilities facing wildlands conservation associated with changes in climate. Creation of carbon markets will result in new opportunities for wildlands protection as funds are generated to support carbon sequestration, but as one respondent cautioned, the devil is in the details as to whether these climate policies are good or bad for wildlands. For example, he questioned whether old-growth forests sequestered more carbon than younger plantations and warned of a confluence of interest between timber management interests and carbon markets. Another interviewee suggested that work on the connections between greenhouse gases and land use at the state level might lead to a whole new set of General Plan Updates throughout the state that will provide an opportunity for environmental group involvement at the local level.

## Constituency-Building

1. Expand work aimed at building long-term constituencies for wildlands conservation.

   RLFF got it right when they saw the need to expand support for conservation work from nontraditional groups such as Latino populations. While the PWC program might not have been well-matched to this need, it seems clear that the balance of political power in the future will change.

   - Invest in the long-term relationship-building needed to engage and empower nontraditional groups to be more involved in conservation activities. This means following the advice contained within Section 8, including pursuing work on urban rivers and parks issues, on environmental education and youth engagement, and on framing the connections between environmental health and justice and wildlands protection more compellingly. Investing in capacity-building in community groups within the Central Valley and the South Coast regions would also be valuable.

   - Expand Latino outreach activities to other areas in southern California. A couple of respondents involved in the constituency-building work noted the diverse array of Latino populations located in multiple places in California and suggested that a process of broader, more sustained outreach be used to reach these populations. These include Orange, Riverside, San Bernardino, Ventura, and San Diego Counties, all of which contain significant Latino populations. Further, most of these counties face similar land use issues, including habitat conservation plans, local funding measures, land use initiatives, significant biological diversity, urban-wildland pressures, and development threats.

- Recognize and deal with the "demographic crisis" within the wilderness movement. Several long term wilderness advocates lamented the aging of the wilderness advocacy movement. "It's all 70 and 80 year olds at Sierra Club meetings," noted one.

- Provide funding to enable existing environmental groups to hire staff from communities targeted for outreach. Representatives from environmental groups that we interviewed suggested the need for their own organizations to evolve to include a broader, more diverse staff. Providing core funding for these hires might help these organizations become more effective at long-term environmental advocacy.

- Connect people – particularly young people -- with nature through environmental education and volunteer stewardship programs. Numerous respondents pointed to the declining exposure of average citizens to wilderness and open space, and viewed the isolation of people from nature as a fundamental problem needing work. In one grantee's terms, "We're losing the next generation of wilderness advocates. We should be fostering use of these areas. We need to get people out there and off of video games." Public programs that expose inner city and suburban children to natural areas and environmental issues provide one vehicle; public service programs like the California Conservation Corps help as well.

## *Grantmaking Style and Process*

1. Maintain the overall approach.

   We heard very few complaints about the RLFF grantmaking style. Indeed, most lauded it as unusually effective and engaged. In particular, the focus on conservation outcomes, being pragmatic and strategic, being respectful and collaborative were all valued highly by grantees.

2. Consider funding a program with a longer time frame.

   Some felt that the five-year time frame was not quite long enough to ensure effective planning and ramp-up activities, and more importantly, the ability to transition organizations off the funding. They suggested a seven-year time frame might be more effective.

3. Fine tune the approach in several ways.

   Respondent suggested several ways to fine tune the RLFF grantmaking approach to ensure its effectiveness. In particular:

   - Consider whether decisionmaking can be streamlined. We heard several concerns about the centralization of decisionmaking authority in the administration of PWC; most were concerned about delays involved in making decisions. Some additional delegation of authority might be appropriate for a future program.

- Increase staffing and find ways to ensure its sustainability. At noted in Section 4, the PWC program was implemented with a remarkably limited set of program officer staffing. The efficiencies that this represents are laudable, but there may be need for greater staffing in the future. Also of concern is the centralization of knowledge that is evident in RLFF staff, and the key role that funder coaching played in achieving successful outcomes. While one cannot clone an Ed Hastey or Michael Mantell, finding ways to transfer some of the kinds of knowledge that they hold into other program officers would be a challenging but important endeavor to build a long term grantmaking function along the lines of a PWC.

- Provide more opportunities for coordination and sharing among grantees. As noted above, we were surprised by how few grantees had any concept of the overall PWC program. The desire to ensure that grantees receive credit for the work is laudable, but somewhat more visibility about funded activities and the lessons that are emerging from them might be desirable. Creating opportunities for regional or activity-specific learning among grantees – at least at the end of the program – would be a reasonable way to build some “double-loop” learning into the conservation community.

- Pay somewhat more attention to the end-of-grant reporting and evaluation. It was challenging to assess some outcomes because the grants database was set up more for accountability and fiduciary purposes than for evaluation purposes. Clarifying some of the key pieces of information needed to assess outcomes by looking at the data items we used in the report might lead to additional data fields that would facilitate reporting and evaluation. Greater inducement to grantees to develop clearer project logic models might also help, which may mean funding project-level evaluation as a component of grants.

# - APPENDIX A -
# STATUS OF POLICIES INFLUENCED BY PWC ACTIVITIES[1]

## *Wilderness Designation*

- **California Wild Heritage Act (Solis/Boxer bill)**
  - *What it would do*: Omnibus, statewide wilderness bill that would designate roughly 2.1 million acres of U.S. Forest Service and Bureau of Land Management lands in California as components of the National Wilderness Preservation System.
  - *PWC-funded work:* In its role as the primary desert organizer for California Wild Heritage Campaign (CWHC), the California Wilderness Coalition (CWC) worked with the National Park Service, the BLM, and desert activists to successfully add 15,000 acres to the act.
  - *Status:* In subcommittee. First introduced in the Senate in 2002 and reintroduced in every subsequent Congress, introduced most recently in the House and Senate in 2007. While this bill has been repeatedly reintroduced, Boxer and PWC grantees began taking a congressional district-by-district approach to wilderness designation, as represented by the following three district-level bills.

- **Northern California Coastal Wild Heritage Wilderness Act (Thompson bill)**
  - *What it did*: Designated 275,830 acres of land in Mendocino and Six Rivers National Forests and in Humboldt, Lake, Mendocino, and Napa Counties as wilderness areas. Included in this legislation is the King Range – the longest undeveloped stretch of coastline in the lower 48 states.
  - *PWC-funded work*: Through multiple RLFF contracts, PACE Capstone worked to advance the bill through both houses of Congress. Specifically, Republican lobbyist Scott Dacey helped coordinate and encourage the bill's sponsors, discussed and negotiated for the bills progress with committee staffers, and communicated with other PWC-funded organizations working on this issue. CWHC, through a grant for which FOR acted as fiscal sponsor, worked to build local support for the legislation and coordinated a successful campaign advocating for Gov. Schwarzenegger to endorse the Act. They also brought stakeholders to the Hill to give testimony and attend educational events directed at the California delegation. The Campaign for America's Wilderness provided strategic support and DC based outreach to enhance support for the Act. Trout Unlimited put the support of their member sportsmen behind the legislation. PWC grantees also worked to secure resolutions from County Supervisors in Napa and Mendocino Counties in support of the Thompson bill. Napa and Mendocino counties both passed resolutions supporting the bill.
  - *Status:* Became Public Law 109-362 on 10/17/2006.

[1] This list of policy issues influenced by PWC grantees is based on a scan of the grant database, interviews and feedback from RLFF staff. It should be viewed as illustrative and not necessarily comprehensive in terms of all issues that PWC grantees and RLFF staff worked on with PWC funding.

- **California Desert and Mountain Heritage Act (Bono bill)**
  - *What it did*: Designated 198,491 acres as wilderness in four new areas and seven existing areas in Riverside County.
  - *PWC-funded work*: Through several PWC contracts, PACE representative Scott Dacey assessed the challenges associated with developing wilderness designations in Representative Mary Bono's district and then worked with her to develop and introduce legislation. The PACE consultant has worked to advance this bill since it was introduced. Through three PWC contracts, Nestande and Associates have worked to build local support for the bill in Bono's district. Photographer Doug Steakley was contracted with to produce compelling photographic images of potential wilderness areas in the 45th Congressional District. The Wilderness Society received funding in 2007 to build constituencies and conduct outreach to promote wilderness in Riverside County. Friends of the River also worked with congressional staff and grassroots organizers to build support for this bill. PWC also supported the efforts of the Wilderness Land Trust and the Conservation Fund to acquire strategic inholdings near Beauty Mountain, on the border of Riverside and San Diego counties, which helped remove potential obstacles to regional political support for the bill.
  - *Status*: Signed into law on 3/30/2009 as part of the Omnibus Public Lands Management Act (Public Law 111-11).

- **Eastern Sierra and Northern San Gabriel Wild Heritage Act (McKeon bill)**
  - *What it did:* Designated 472,805 acres of public federal lands in Mono and Inyo Counties as wilderness, a significant increase from 40,000 acres in earlier bills.
  - *PWC-funded work:* PWC staff, consultants and grantees undertook a variety of activities to advance wilderness protection in the Eastern Sierra. For example, PACE representative Scott Dacey assessed the challenges associated with developing wilderness designations in McKeon's district and then worked with McKeon's staff and with committee staff to advance the bill in 2005-2006. Through several grants, the California Wilderness Campaign was funded to build local support for wilderness designations and to coordinate various efforts at strengthening current wildlands management. CWC was specifically working towards the designation of WSAs in San Bernardino County, which are not actually included in McKeon's legislation. Building local support for wilderness in McKeon's district may have had an effect on public perceptions of his bill however. Randle Communications received a contract from PWC to conduct polling in Rep. McKeon's district to assess support for additional wilderness designations. This polling data was used to craft a mailing for residents of the 25th district. This did not specifically pertain to the lands considered in McKeon's legislation, but, as with the grant above, may have helped build support for wilderness in general among his constituents. Friends of the River worked with congressional staff and grassroots organizers to build support for this act. Trout Unlimited was funded to build support for roadless area protection and wilderness conservation among hunters and anglers. The new designation would apparently protect significant mule deer habitat. Friends of the Inyo were funded to develop maps and graphics in support of the designation.
  - *Status:* Signed into law on 3/30/2009 as part of the Omnibus Public Lands Management Act (Public Law 111-11).

- **Sequoia-Kings Canyon National Park Wilderness Act (Costa bill)**
  - *What it did*: Designated 114,686 acres of the existing national park as wilderness.
  - *PWC-funded work*: PWC supported the groups involved in the California Wild Heritage Campaign joined by Gordon Johnson of the California Wilderness Legacy project (supported by a grant to the Trees Foundation as fiscal sponsor). Grantees engaged in local constituency building and advocacy for designation of existing national park acreage into wilderness status.
  - *Status*: Enacted into law on 3/30/2009 as part of the Omnibus Public Lands Management Act (Public Law 111-11).

- **Designation of a portion of Limekiln State Park as state wilderness (Assembly Bill 2945)**
  - *What it did*: Designated 413 acres as state wilderness within Limekiln State Park on the southern Big Sur coast. The park is adjacent to the Ventana Wilderness in the Los Padres National forest creating a state-federal linked set of wilderness areas. This designation was the first new legislatively-designated wilderness in the state system in more than 30 years.
  - *PWC-funded work*: CHECK: A coalition of groups including PWC grantees Ventana Wilderness Alliance, the California Wilderness Coalition and the California Wilderness Project worked on the bill with Assemblymember John Laird. The designation was a portion of a larger bill aimed at limiting management actions within state wilderness areas [see discussion below].
    *Status*: Signed into law by the Governor on September 30, 2008.

## *Wild and Scenic Rivers Protection*

- **Northern California Coastal Wild Heritage Wilderness Act (Thompson bill)**
  - *What it did:* Designated 21 miles of the Black Butte River as a wild and scenic river.
  - *PWC-funded work:* See above
  - *Status*: Signed into law October 17, 2006.

- **California Desert and Mountain Heritage Act (Bono bill)**
  - *What it did:* Designated 31 miles of rivers as wild and scenic, including the North Fork of San Jacinto, Bautista Creek and Palm Canyon.
  - *PWC-funded work*: See above
  - *Status*: Signed into law on 3/30/2009 as part of the Omnibus Public Lands Management Act (Public Law 111-11).

- **Eastern Sierra and Northern San Gabriel Wild Heritage Act (McKeon bill)**
  - *What it did*: Provided Wild and Scenic River status to: 24 miles of the Amargosa River, including portions of the river in Inyo and San Bernardino counties; 19 miles of the Owens River headwaters; and 7.25 miles of Piru Creek in LA County.
  - *PWC-funded work*: See above
  - *Status*: Signed into law on 3/30/2009 as part of the Omnibus Public Lands Management Act (Public Law 111-11).

- **Actions to Designate Portions of the Mokolumne, Clavey, Tuolumne and Arroyo Secoa Rivers as Wild and Scenic**
  - *What it would do*: Would support wild and scenic rivers designation of the North Fork of the Mokelumne River, the Clavey River, the Arroyo Seco River and other key rivers in the Santa Lucia Range of the Los Padres National Forest
  - *PWC-funded work*: The Foothills Conservancy received a grant to lobby local elected officials and enhance the constituency for designation of the North Fork of the Mokelumne River. Tuolumne River Trust received funding to build support for designation of the Clavey River, and grants to the California Wild Heritage Campaign supported the work of activists in Tuolumne County working for the designation of the Clavey River. This small grant allowed activists to offer tours of the river to local opinion leaders, develop outreach materials, and send mailings. Under a 2006 grant, Friends of the River carried out a Central Coast Wild and Scenic Rivers campaign which sought designation for rivers in the Santa Lucia Range and the Los Padres National Forest. Using PWC funds, FOR hired a coordinator, developed and disseminated outreach materials, and worked with Rep. Farr to develop legislation.
  - *Status:* None of the above designations have occurred.

- **San Joaquin River Restoration Settlement Act**
  - *What It Did:* Authorizes $88 million in funding to launch an effort to restore the San Joaquin River, which has been drained for decades to supply Central Valley farms. More water would be left in the river, and populations of spring-run Chinook salmon would be returned under terms of a legal settlement in a long-running environmental battle over the river.
  - *PWC-funded activities*: PWC supported efforts of consultants PACE, LLP; Agricultural Resources; and Kadesh and Associates, in D.C., working in coordination with the Natural Resources Defense Council (a CCLI grantee, but not a grantee of PWC) on the settlement and federal policy issues. Also, NRDC's efforts in CA were supported by Conservation Strategy Group, a PWC consultant in CA. PWC grants also enabled the San Joaquin River Parkway and Conservation Trust to focus more of its staff time and attention on river restoration and developing a local voice supportive of restoration goals.
  - *Status:* Signed into law on 3/30/2009 as part of the Omnibus Public Lands Management Act (Public Law 111-11).

- **Klamath river dam removal**
  - *What It Could Do*: Creates a process that could lead to demolition of four dams on the Klamath River by 2020.
  - *PWC-funded activities*: Four dams on the Klamath River owned and operated by PacifiCorp under federal contract, have been the focus of a decades-long dispute among environmental groups—including PWC grantees the California Hydropower Reform Coalition, American Rivers, and Natural Heritage Institute—Native American tribes, farm irrigators, and communities. The four dams block salmon migration into the upper reaches of the Klamath River, significantly undermining salmon and other regional fisheries. PWC supported economic and biological analyses of dam removal and restoration. PWC consultants facilitated discussions

with California officials in order to work through remaining impediments to an agreement, which would include millions of dollars paid by PacifiCorp toward the dam removal effort. The California Energy Commission and the U.S. Department of the Interior have estimated that removing the dams could cost PacifiCorp tens of millions of dollars less than would installing fish ladders and making other changes that would be required if the dams remain in place.

- *Status:* Federal officials and private energy company executives signed a nonbinding agreement on November 12, 2008. The agreement in principle would lead to dam removal if a number of conditions are met. These include liability protection for PacifiCorp, a $200 million cap on removal costs, agreement by the state and federal agencies to alter their regulatory processes, commitment from the state to provide $250 million to support dam removal, and commitment by the federal government to fund a $1 billion Klamath Basin settlement. While the agreement potentially provides a process for forward movement on river restoration, conservation groups – including PWC grantees -- were split on the efficacy of the agreement.

- **Cache Creek Wild and Scenic River bill (Assembly Bill 1328)**
  - *What It Did:* Designated 31 miles of Cache Creek as a state wild and scenic river.
  - *PWC-funded activities*: The North Coast organizer hired by CWHC helped to secure a 4:1 Yolo County Board of Supervisors vote endorsing the Cache Creek designation. FOR built upon this effort by leading a campaign directed at mobilizing public support and lobbying key California legislators in support of the Cache Creek bill. FOR organized float trips, developed a media strategy aimed at local and state papers, generated op-eds from non-traditional supporters, and secured endorsements from local officials, businesses, conservation groups, scientists, and area residents. They also lobbied key legislators, committee members, and Governor Schwarzenegger on behalf of the designation. Strong public support eventually overcame opposition from agricultural interests and water districts in Yolo and Lake Counties.
  - *Status:* Signed into law on October 6, 2005.

## *Other Public Lands Protection*

- **Fort Hunter Liggett**
  - *What it did*: Provides the US Forest Service the right of first refusal to negotiate over disposal of any land at Fort Hunter Liggett (FHL) should it be determined through the Base Realignment and Closure process to be not needed for military purposes. FHL occupies 165,000 acres in the Big Sur area adjacent to the Los Padres National Forest.
  - *PWC-funded work*: Photographer Doug Steakley received a contract to photograph the natural, scenic, recreational and cultural resources of FHL to ensure "we have the images we need to educate the public and decision makers about the need to permanently protect this magnificent property." FHL was a priority area for the Central Coast region for PWC protection. In addition, the Ventana Wilderness Alliance was given a capacity-building grant, in part to enhance their ability to participate in the planning process for Fort Hunter Liggett thereby facilitating a transfer of the base to conservation ownership.
  - *Status:* Language granting the right of first refusal was included in the Military Construction Appropriation Bill, 2005 (Senate Report 108-309, Section 129).

- **Sacramento River Bend National Recreation Area**
  - *What it would do:* Would establish a 17,000 acre Sacramento River Bend National Recreation Area on BLM land near the town of Red Bluff
  - *PWC-funded work*: Friends of the River undertook outreach, education, and policy work to build support for this proposed bill, which received broad local support including endorsements from the Boards of Supervisors of both Tehama and Shasta counties and the City of Redding.
  - *Status:* Introduced in the House by Rep. Wally Herger (CA-2) in February of 2007 and in the Senate by Senators Barbara Boxer and Dianne Feinstein in March 2007. Referred to the House Subcommittee on National Parks, Forests and Public Lands.

- **National Landscape Conservation System**
  - *What it did:* Codified the 26-million-acre National Landscape Conservation System, which will provide systematic protection to ecologically and historically valuable lands like the California Desert Conservation Area and the Headwaters Forest Reserve in California.
  - *PWC-funded work*: PWC consultants Ed Hastey and RLG and the California Wilderness Coalition coordinated policy development with federal agencies, and prepared briefing materials and advocated for incluosion of the California Desert Conservation Area in the NLCS.
  - *Status:* Signed into law on 3/30/2009 as part of the Omnibus Public Lands Management Act (Public Law 111-11).

- **Prohibition of road construction in state parks (Assembly Bill 1457)**
  - *What it would do:* Triggered by the proposal to build a toll road through the San Onofre State Beach, this bill would prohibit road construction through state parks, unless the Department of Parks and Recreation gives specific permission
  - *PWC-funded work*: The Conservation Strategy Group lobbied state lawmakers in support of the bill.
  - *Status:* As of January 2008, the bill was stalled in the California legislative process. The decision by the California Coastal Commission to reject plans for an extension of the Foothill South Highway through San Onofre State Beach may have reduced the pressure to get this broader legislation.

- **Prohibition of disposition of state conservation lands (Senate Bill 1701)**
  - *What it did*: Prohibits the state from disposing of state conservation lands unless those lands are deemed unnecessary for conservation
  - *PWC-funded work*: PWC funded the Conservation Strategy Group through several contracts to work with key members of the California legislature and staff of administrative agencies (among other things) to move this bill.
  - *Status:* Signed into law by Governor Schwarzenegger in September, 2004.

- **California Roadless Rule**
  - *What it did:* After President Bush rolled back Clinton era rules protecting a significant amount of roadless areas on federal lands, a campaign was begun in California to reinstate these protections at the state level. In July of 2006, Governor Schwarzenegger petitioned the Secretary of Agriculture for protection of all California roadless areas. A September 2006 court ruling re-extended these protections at the national level and for the time being eased the need for the California roadless rule.
  - *PWC-funded work*: Trout Unlimited received significant support from PWC in 2005 to undertake a variety of surveys and outreach to hunters and anglers, including work to build support for roadless area protection and wilderness conservation. The Bush Administrations' revised Roadless Area Conservation Rule created an 18-month window for governors to petition the federal government. Under this grant, TU rallied sportsmen to encourage Gov. Schwarzenegger to petition the Secretary of Agriculture to request permanent protection of all of California's forest roadless areas. TU also lobbied elected officials and state-level political appointees to support the petition. The California Wilderness Coalition also received funds for the creation of a California Roadless Rule Campaign Plan, which was completed in September 2006.
  - *Status:* By the end of September 2006, the 2001 Roadless Area Rule (the protections from which the California Rule would have emulated) had been reinstated through a court ruling.

- **State wilderness areas management guidelines (Assembly Bill 2945)**
  - *What it did:* Streamlined state wilderness management by allowing state agencies that own designated state wilderness lands to use the same "minimal approach" to management as does the federal government in federal wilderness areas.
  - *PWC-funded work*: The California Wilderness Coalition, the Conservation Strategy Group and RLG consultants were funded to work with the California Department of Parks and Recreation to advocate for a change in state wilderness management rules and establish new state wilderness areas. Work included researching federal rules and identifying opportunities to address state problems that might be created by making state law consistent with the federal approach. Grantees built a conservation coalition that was supportive of the changes.
    *Status*: Signed into law by the Governor on September 30, 2008.

- **California Fish & Game Code Changes; CEQA Fee Increases (Senate Bill 1535)**
  - *What it did*: Adjusts California Fish and Game Commission staffing, conflict of interest, and meeting processes. It also adjusts for inflation the filing fees associated with the California Environmental Quality Act. CDFG estimated that the changes would produce $6.5 million in additional resources to cover its review of projects affecting fish and wildlife resources.
  - *PWC-funded work*: California Trout was funded so that they could hire an advocacy consultant, establish and cultivate relationships with key agencies and develop an action alert system to inform supporters. The consultant worked in Sacramento to ensure that this bill passed.
  - *Status:* Signed by the Governor in September 2006.

- **DPR authorization to acquire land subject to conservation easement (Senate Bill 421)**
  - *What it would do:* Authorizes the California Department of Parks and Recreation to acquire, by donation or purchase, property subject to a conservation easement or deed restriction if the director of the department determines that the conservation easement, deed restriction, or other limitation is consistent with and promotes the purposes for which the property is to be acquired.
  - *PWC-funded work*: As one element of its 2006 contract work for PWC, the Conservation Strategy Group prepared support materials and made lobbying visits to state representatives in support of the bill.
  - *Status:* The bill is in the California Assembly but has not been passed.

- **Sierra Nevada Conservancy (Assembly Bill 2600)**
  - *What it did:* Created the Sierra Nevada Conservancy under the state Resources Agency. Advocacy also focused on securing mechanisms to fund the Conservancy's operations, including fee revenues from sales of a Sierra Nevada license plate.
  - *PWC-funded work*: Numerous PWC consultants and grantees worked to help create the Sierra Nevada Conservancy along with its funding mechanisms. Building on work started under the CCLI program, the Conservation Strategy Group lobbied state senators for the passage of AB 2600. The Sierra Fund mobilized urban and nontraditional constituencies to support the Conservancy, and carried out a series of activities to help the Conservancy's start up, including educational and media campaigns. PWC also funded the Sierra Business Council, which helped to obtain bi-partisan authorship for the legislation and built support from county supervisors, businesses, and trade and industry groups. In 2007, PWC funded the Sierra Nevada Alliance to provide outreach to the Conservancy and develop collaborative projects.
  - *Status*: Signed into law by Gov Schwarzenegger in September 2004, which created the new state agency effective in January 2005.

## *Policies that Increase Funding for Conservation*

- **Proposition 84 – Clean Water, Parks and Coastal Protection Act – and its implementation**
  - *What it did:* Proposition 84 provides $5.4 billion in funding for all of the major natural resource protection and water programs at the state level, including approximately $3 billion for activities that relate closely to wildlands conservation. Since passage of this proposition, numerous bills have been introduced to specifically direct these funds.
  - *PWC-funded work:* PWC funded the Conservation Strategy Group (CSG) to analyze options for raising conservation funds in the bond measures, negotiating and drafting bond amendments, doing outreach to potential supporters, legislators and the Schwarzenegger Administration, who ultimately supported the measure as did a broad coalition of more than 700 environmental groups, water districts, elected officials, local governments, and civic and religious organizations. The Proposition 84 campaign itself was supported and funded by a variety of conservation groups and individuals. RLG staffer Michael Mantell was the Campaign Chairman for the

proposition, and more than a third of the Proposition 84 Executive Committee were PWC grantees. Following passage of the measure, CSG and other grantees worked to influence its implementation to ensure that conservation measures received their fair share of the funds. CSG was funded in 2006 to develop proposals for bills to direct funds towards conservation projects and brief legislative staff and administration officials on conservation opportunities. In their 2007 contract, they were funded to coordinate development of a proposal to secure $400 million for local and regional parks under the proposition. In January 2008, they convened a meeting of organizations interested in supporting the proposal.
  - *Status:* The proposition passed with 53.8% of the vote.

- **Sportfishing license revenues (Assembly Bill 7)**
  - *What it did:* Requires a third of sports fishing license fees to be spent by the California Department of Fish and Game on fish hatchery operations and the Wild and Heritage Trout Program.
  - *PWC-funded work*: California Trout was funded so that they could support an advocacy manager, who lobbied key legislative staff in support of the bill. California Trout also argued that it was instrumental in having nine staff positions added to the Wild and Heritage Trout program.
  - *Status*: Signed into law in May of 2006.

- **Orange County Renewed Measure M**
  - *What it did*: Renewed a one-half cent sales tax to fund transportation projects in Orange County. Measure M renewed the program for 30 years and is estimated to generate $11.8 billion for transportation projects, including $243.5 million for environmental mitigation.
  - *PWC-funded work*: The Endangered Habitats League and the Conservation Biology Institute were funded by PWC to work with approximately thirty other environmental groups to provide a habitat-focused strategy to the Orange County Transportation Authority. They also facilitated discussions between the Transportation Authority and state wildlife agencies to help shape the measure. Normally freeway project mitigation is done on a small scale, piecemeal basis, however, the negotiated direction calls for programmatic mitigation, which allows for acquisition, restoration and management of habitat on a large-scale and biologically-meaningful basis.
  - *Status:* Measure M passed with 69.5% of the voters in conservative, anti-tax Orange County in November 2006. Twenty-nine environmental groups had supported the measure because of the mitigation funding.

- **TransNet -- San Diego County sales tax for transportation**
  - *What it does*: Proposition A on the Nov. 2, 2004 ballot would extend for 40 years a half-percent sales tax approved in 1987 and due to expire in 2008. The $14 billion in projected revenues are earmarked for traffic congestion relief projects along every major corridor in the county, bicycle and pedestrian projects, and the continuation of subsidized transit passes for seniors, youth and disabled passengers. It contained incentives to encourage “smart growth” patterns of regional development in addition to investments in public transit. As a result, environmental groups were split on

whether to support the renewal or not, with Sierra Club and the Center for Biological Diversity opposed.

- *PWC-funded work*: Endangered Habitats League (EHL) was provided early support by PWC which ultimately allowed it to promote the reauthorization of the county bond measures so that it would devote funding for conservation. EHL worked with the San Diego Dialogue to organize an informal coalition of more than 35 civic organizations in support of the measure enabling such funds.
- *Status*: In November 2004, the TransNet tax passed with 67% of votes cast, authorizing $880 million in public expenditures for the acquisition, management, restoration and monitoring of endangered habitats in the County over the next 40 years.

## *Holding the Line against Damaging Policies*

**Federal Level**

- **RS 2477 claims in the California Desert**
  - *What it would have done:* Revised Statute 2477 is legislation enacted in 1866 that reserves rights-of-way for highways across public lands not designated for other purposes. It was repealed in 1976, but preexisting valid claims were grandfathered in. The vagueness of the statute's language has led to considerable controversy, with cities and counties in certain parts of California pressing claims for new routes through wilderness areas and parks based on old logging roads or illegal ORV tracks. A number of California conservation organizations are working to fight these claims, which they feel are not valid exceptions to the 1976 repeal.
  - *PWC-funded work*: PWC consultants and grantees worked at both national and state levels on the RS 2477 issue. The Planning and Conservation League, Conservation Strategy Group, California Wilderness Coalition (CWC) and lobbyist Scott Dacey all received funding to fight RS 2477 claims. CWC tracked RS 2477 route claims and legislation, coordinated opposition to specific RS 2477 claims, and engaged in direct advocacy with elected officials at all levels. CWC is primarily working to combat the following two suits to establish new roads under RS 2477:
    1) In 2006, Inyo County brought suit to build new roads through wilderness areas in Death Valley National Park, 2) in 2007, ORV users brought suit to open routes through the Surprise Valley area of Death Valley. CWC is also working with PWC funded lobbyist Scott Dacey to pass legislation limiting the funding the Department of the Interior can use to process RS 2477 claims. Dacey has been requested to provide strategic guidance for RLFF's approach to combating RS 2477 claims. Part of this work is carried out with the support of the CWC-coordinated Alliance for Responsible Recreation. More recently, the Conservation Strategy Group has been monitoring federal legislation to determine whether any proposed bills will affect the administration of RS 2477 claims.
  - *Status:* In August of 2007, a federal court denied the RS 2477 claim for a new route through the Surprise Canyon area of Death Valley National Park. The claim was thrown out for lack of standing so it would be difficult to directly attribute this victory to CWC's work.

- **Protect integrity of Sierra Nevada Framework** [see discussion in Section 7]
  - *What it did:* The U.S. Forest Service's 2001 Sierra Nevada Framework was developed over the course of more than a decade to address the issues of species decline and catastrophic fire. To the dismay of conservation organizations, the framework was reviewed under pressure from the Bush Administration and in 2004 the majority of its wildlife and habitat protections were removed. Conservation groups used advocacy, appeals, and lawsuits in an attempt to stop the plan revisions from being implemented. The California Attorney General's office also filed suit to stop the revisions.
  - *PWC-funded work:* With Friends of the River Foundation as fiscal sponsor, Sierra Forest Legacy (formerly known as the Sierra Nevada Forest Protection Campaign) was provided roughly $2 million to support the SFL's appeal of the revisions, work assisting the California Attorney General's office in their lawsuit, and outreach effort to generate substantive appeals from residents (they succeeded in generating 7,000). The initial grant also provided funds to intervene in the Quincy Library Group's legal challenge to the framework, which would allow logging beyond the levels proposed in the 2004 revisions. Under this grant SFL apparently also opposed plans to log old growth forest in the Duncan Canyon Roadless Area. Under the second grant, funds were provided to support continuing legal opposition to the revised framework and to appeal particularly damaging logging projects.
  - *Status:* The Ninth Circuit Court of Appeals ruled in favor of the conservation groups on May 14, 2008. Coalition members have succeeded in halting eight logging projects under the framework.

- **Conservation easement tax incentive**
  - *What it would have done:* Donation of conservation easements is facilitated by the ability of donors to deduct the value of the donation as a charitable contribution. Opponents of conservation land restrictions pushed to drastically reduce tax cuts for conservation easements; conservation groups worked to expand tax incentives for easements.
  - *PWC-funded work*: RLFF convened foundations and kept them engaged on this issue, and worked with a variety of consultants including Resource Media to combat efforts aimed at reducing incentives for conservation. These consultants worked with the Land Trust Alliance (LTA) to lobby key members of tax writing committees, IRS employees, and White House officials, held various education events and awards ceremonies for members of Congress and their staffs, engaged 1,200 land trusts in a broad effort to lobby Congress on the issue, trained land trust leaders in media and communications skills, and distributed a grassroots media tool kit to 1,667 land trusts. Representatives of the LTA felt that they helped to turn a hostile situation into one in which there is greater federal understanding and support of conservation easements. The LTA and PWC-grantee the California Council of Land Trusts, with PWC consultant support, also focused on ensuring that the Farm Bill – the Food, Conservation, and Energy Act of 2008 – maintained tax incentive provisions and funded them through the Farmland Protection and Grassland Reserve Programs. Grantees mobilized the land trust community nationally and in California, and

coordinated with sportsmen's, wildlife, conservation, and agricultural organizations to encourage Congress to include the tax incentive and funding in the final bill.

- *Status:* In the end, reforms on this front were modest. Indeed, in 2006 Congress passed a significant expansion of federal tax incentives for land conservation, including donations of conservation easements. These provisions were renewed for two years in 2008, when Congress overrode a Presidential veto to pass the Farm Bill. The bill also allocated $733 million over five years to the Farmland Protection Program and $300 million for the Grassland Reserve Program, both of which provide grants to land trusts for the purchase of conservation easements.

- **Oceans State Options Act of 2005 – Offshore drilling language in the 2005 House Budget Reconciliation bill**
  - *What it would have done:* Congressman Richard Pombo's House Resources Committee attached language to the House Budget Reconciliation Act that would remove the 24-year old moratorium on drilling for oil off of the California coast.
  - *PWC-funded work*: Funding was provided to the National Outer Continental Shelf Coalition to fight to have the language removed. These funds were used to take out ads in key districts and to provide a paid phone bank to facilitate constituent calls to House Rules Committee Chairman David Dreier (R-CA-26). Centaur North, Inc received funds to generate opposing op-eds in the largest Spanish language newspaper in California, as well as to hire organizers to generate opposition calls to Congressman Dreier. RLFF consultants also apparently lobbied state and local California officials to rally against the language. The Pacific Coast Federation of Fishermen's Associations received funding to provide strategic advice to PWC on federal offshore oil drilling policies and to fund outreach on the issue.
  - *Status:* Opposition caused the language to be removed from the act prior to moving out of the House Rules Committee.

- **2005 House Budget Reconciliation bill – Mining claims, Channel Island hunting**
  - *What it would have done:* Two other provisions of this bill were also of concern for California wildlands conservation. First, one provision would have lifted a moratorium on allowing companies and individuals to buy mining claims on public land. Second, a provision would have extended the end date for private hunting business in part of Channel Islands National Park.
  - *PWC-funded work*: PWC consultants worked to defeat both of these provisions. PWC consultants coordinated with Sen. Feinstein and Sen. Bingaman, as well as other environmental organizations, to defeat the former provision. PWC consultants worked with NPS and DOD staff, and the offices of Sen. Feinstein and Rep Capps to stop the latter provision.
  - *Status*: All provisions were removed from the proposed legislation.

**State Level**

- **Rollback of the California Environmental Quality Act**
  - *What it would do*: While modeled after the National Environmental Protection Act, CEQA requires public agencies to avoid or mitigate, rather than merely assess, environmental damage where possible. There has been an ongoing effort to weaken the CEQA in order to reduce hurdles for housing developers.
  - *PWC-funded work*: Among other activities conducted through its PWC-funded Better California Campaign, the Planning and Conservation League Foundation campaigned against a rollback of the CEQA. In partnership with the California League of Conservation Voters, the League spearheaded the CEQA Defense Campaign, which helped to defeat the 2004-2005 attacks on the act. As part of this work the League compiled a report on the positive achievements of the CEQA for use as an outreach tool.
  - *Status:* CEQA remains mostly intact, but campaigns to weaken it are ongoing.

- **Takings compensation and limitations (Proposition 90)**
  - *What it would have done:* This constitutional amendment would have required government to pay property owners if it passes certain new laws or rules that result in substantial economic losses to their property. Also, government would have been more restricted in taking private property for public uses.
  - *PWC-funded work*: Working for the California League of Conservation Voters Education Fund (CLCVEF), the law firm Shute, Mihaly and Weinberger carried out legal, economic and fiscal research to understand the impact of the initiative on environmental law and regulation in the state. CLCVEF then used this research to educate key policymakers, opinion leaders, and other environmental organizations about the importance of this issue. They provided the information to numerous statewide and regional environmental organizations to enable them to inform and mobilize their members.
  - *Status*: Voted down on the November 6, 2006 ballot, with a 48% (yes) to 52% (no) vote.

- **Takings and Eminent Domain Limitations (Propositions 98 and 99)**
  - What it would have done: These proposed constitutional amendments would have limited state and local government's authority to take private property. Both were on the June 2008 ballot and were in essence, competing bills. Proposition 98, promoted by a coalition of landlords, developers, and the Howard Jarvis Taxpayers Association, would have prohibited the use of eminent domain for all but infrastructure projects and would have outlawed rent control. Environmental advocates feared that Proposition 98's takings provisions would undermine conservation-oriented land-use regulation. Proposition 99 was a narrowly targeted reform that applied only to owner-occupied single-family residences, which are most commonly found in developed areas. Hence, it was supported by city and county governments and most groups in the conservation community as a way to offset the potential damage from an affirmative vote on Proposition 98.

- *PWC-funded work:* RLFF funded several organizations to develop nonpartisan studies that analyzed the effects of these propositions. The CLCVEF study of Proposition 90 was extended to examine the impacts of Proposition 98. A second analysis compared the two propositions and their economic and fiscal effects, and was conducted by the California Center for Environmental Law and Policy (CCELP) at the University of California, Berkeley. PWC also contracted with Wilson-Miller Communications, Inc. to support outreach on the eminent domain issues to nontraditional constituencies, including Republicans, business leaders and agricultural community organizations.
- *Status:* Proposition 99 passed with 62.5% of the vote, while Proposition 98 was defeated.

**County Level**

- **Napa County Measure A – Property Rights**
  - *What it would have done:* Measure A was a property rights initiative that, in the words of the American Farmland Trust "would have set a precedent that could have crippled virtually every government effort to protect wildlands, farmland and other open lands in California through land use regulations." In sum, it would have forced local governments to pay landowners for property value lost due to conservation measures.
  - *PWC-funded work:* American Farmland Trust received funding to conduct research to oppose Measure A. AFT used the money to fund legal and polling research to frame the policy debate. In addition to undertaking the research funded by PWC, AFT also partnered with the Greenbelt Alliance to organize opposition to the measure, but kept a low profile. Polling data indicated that opposition would be better accepted if local organizations, such as the Napa Farm Bureau took the lead role.
  - *Status:* The measure was soundly defeated in 2006.