



As we enter the final quarter of 2018, it is already clear that this year has been notably productive. The Board's focus on resolving internal communications issues and improving governance practices has been sustained, with energized board committees and significant progress in addressing issues raised in the Board Self-Assessment. This includes framing a more intentional board recruitment and nominations process and the development of a comprehensive Board Manual, with a Bylaws update and other improvements anticipated in early 2019. The planned Board Retreat in 2019 will offer another opportunity for the Board to remain focused on good governance and effective leadership for the future.

The Conservancy's commitment to increased community outreach and engagement which began in 2017 through a greatly expanded event schedule, new outreach materials and meetings with community members has accelerated in 2018, with the arrival of a Conservation Program Manager (Lindsay Cope) and investment in professional communications support through a contract with Angela Hains and Adam White in June of this year. In addition to an already ambitious community outreach and event calendar, the Board and staff teamed up to hold two extraordinary community events, both hosted by Jim and Ginger Andrasick, which were well attended and offered valuable insights and opportunities to reconnect with Preserve residents. The feedback I am hearing from our communications liaison, Kathy Siegel, and other Community Board Members and Preserve residents has been positive, and while this work continues to be essential, it appears we are on the right track.

Programmatically, 2018 has also been productive and rewarding. Monthly highlights providing updates and 'shareable stories' is a new innovation and has been well-received by Board members. The September Highlights are attached for your convenience. Consistent with the June 2017 Strategic Framework and our 2018 Workplan, the Conservancy staff continues to focus on sustaining and strengthening our partnerships with Preserve community members and staff and engaging the community in our efforts to steward the land and waters of The Preserve. Key focal areas have included fuel management, invasive weed control and assisting landowner-initiated Openlands enhancement projects. The Conservancy team supported the installation of fiber-optic cable throughout the Preserve with no issues (thanks in large part to terrific leadership and preparation by Forrest Arthur) and Forrest and I are now working together in pursuit of improved cell coverage for the community. In many ways, an outstanding year of productive partnerships.

That said, challenges remain. In support of our November discussions and at the suggestion of Ron Eastman and Rick Werner, I am also including a candid assessment of several key challenges we continue to face, and how we propose to address them. I hope you will treat this assessment as sensitive Board information, provided in the spirit of collaboration and problem-solving. As always, your feedback and thoughtful insights are not just welcome, but essential. Please do not hesitate to call me or drop me a note any time.

Community Outreach, Events and Communications

Hacienda Talks, Saunters and Hosted Events: The Conservancy is on track to hold 20 events in 2018, with approximately 350 participants overall. These break out as: 7 Hacienda talks, 2 member-hosted events, and 11 outdoor-based events, including natural history walks, restoration events and related activities. In addition to ~60 'Conservancy Friends' who frequent our events, this year has seen an increase in new members and less frequent visitors, especially at wildlife-related and fuel management presentations. Jeff Langholz has participated in many of these events, providing a welcome opportunity to introduce him to Preserve members and staff. I would like to encourage all local board members to join us as frequently as possible, as these events offer terrific opportunities to support the staff, identify prospective board members and inspire engagement in our work.

Challenges in 2019:

1. **Continued limited engagement outside our “Friends’ Circle:”** Despite recent increases in new /non-traditional member participation and improved coverage of Conservancy events through ‘The Preserve Life’ newsletter, we are still not reaching and engaging a large portion of the Preserve memberships in our events. Every event requires substantial staff investment and the ‘ROI’ to date is limited in terms of meeting our broader outreach and engagement goals.
2. **Concerns related to use of the Hacienda as a venue:** While the Hacienda Lecture Series remains the most popular and effective element of our outreach program, Preserve CEO Karen Baxter has raised serious concerns that the Conservancy’s ~bi-monthly events delay dinner seating, triggering a series of internal issues relating to customer service that unacceptably impacts Ranch Club staff. In 2018, at Karen’s request we shifted start times and dates to alleviate these issues, to no avail. The unfamiliar timing sharply reduced our event attendance and did not resolve the Ranch Club’s issues.

What We Are Doing: To address both issues, in 2019 we are shifting a significant portion of our event program to a more targeted, neighborhood gathering format at Preserve members’ homes. If successful, these events will allow us to invite new participants and to focus on engaging members directly in our work, for example through Openlands partnerships. This approach includes reducing the number of Hacienda talks to 4 times per year. This is still in excess of Karen’s preference, but seems a reasonable compromise until another suitable venue becomes available.

Outreach Resources and Materials: Our 2018 communications priorities include improving members’ access to information and sharing stories that help the Preserve Community understand the Conservancy’s mission, vision and programs and how they can participate and support our work. In addition to the new Conservancy website (an important vehicle for disseminating information), this has resulted in five substantial new resources:

- Monthly ‘highlights’ to assist Board members in storytelling and serving as ambassadors for our work
- The Conservancy Brochure
- The Preserve Owners’ Guide to Weed Management
- An Openlands Restoration Plan template, providing an easy framework for partnership activities
- A beautiful Book of Homes and Habitats for prospective and new members, in partnership with SLPA

Challenges in 2019:

1. **Delivering quality information, consistently:** Preserve members are diverse in their interests, their consumption of information, and the frequency of their presence, and the Conservancy has not yet found a winning strategy for broad, effective outreach. This audience diversity increases the degree of difficulty of ensuring quality communications, including striking the right ‘tone’ across the membership and among our staff and other Preserve teams.
2. **Ensuring positive messaging by partners:** Preserve staff do not consistently characterize the Conservancy in an accurate and positive manner. Strengthening our relationships and improving our understanding and engagement with Preserve staff needs to be elevated as a priority.

What We Are Doing:

1. Angela and Adam are well along in the development of an Outreach and Communications Strategy that will guide and focus our efforts in 2019. At my request, they will include strategies and recommendations for improving ‘internal’ communications and relationships among Conservancy and Preserve staff members. Our 2019 budget includes funding for a new Preserve Design brochure and additional materials to ensure continued momentum and improved communications through 2019.
2. Karen, Forrest and I meet regularly and share a desire to resolve these issues collaboratively. For our part, Conservancy staff training regarding key messages, effective tone and other communications skills has already begun and will be a priority in early 2019.

Conservancy Programs

Fire Risk and Fuel Management:

In late June, both Forrest and I were contacted by insurance brokers alerting us to the potential for wide-spread cancellations and/or rate hikes in communities such as the Preserve as a result of catastrophic fires across the state. This led a rapidly assembled 'war council' comprised of Karen B, Forrest and myself, along with Kelly Dyer and other SLPA staff and a Regional Fire District representative to determine how best to serve the community. As a result of that meeting, the Conservancy stepped up to an ambitious goal: finalize the update of the Preserve-Wide Fuel Management Standards with support from regional fire experts and the CSD, secure Regional Fire District and Conservancy Board approval, and present the new Standards to the Preserve Joint Board meeting and subsequently to the Preserve Community by the first week of September, in advance of anticipated insurance company site inspections. The team recognized that the effort did not stop there, but that immediately following a successful update, Conservancy staff would then take the lead in outreach and support for approximately 40 Preserve members who did not have a Lot-Specific Fuel Management Plan on file.

We accomplished these goals fully and on schedule, culminating in a very well-attended Hacienda presentation by Forrest, fuel management expert Carol Rice, deputy Fire Chief Llewelling and myself. The new Fuel Management Standards have been characterized as the 'new gold standard' for wildland-urban fuel management by Regional Fire Chief Urquides and community response has been positive.

Challenges in 2019:

1. Insurance concerns and member anxiety will remain high in 2019, requiring a high level of engagement by Conservancy staff in updating Lot-Specific Plans, guiding implementation, and joining members at insurance inspections or meetings when requested.
2. Many Preserve members have 'gotten ahead' of their fuel management consultants and cleared native vegetation in Openlands well in excess of standard or approved prescriptions.
3. Concerns have been raised about what level of effort/expense the Conservancy should be directing to fuel reduction in the Wildlands, especially in terms of woodland areas and large weed infestations.

What We Are Doing:

1. Lindsay Cope has taken the lead in the member-outreach effort for the Conservancy and is spending more than 50% of her time on carrying this forward. Given the importance of this effort for both community safety and the protection of the Protected Values, this level of effort is appropriate and will continue well into 2019.
2. The Conservancy does not intend to take any action on 'over-implementation' of fuel management plans this year and instead is directing our energy towards educating landowners on the value of following the Lot-Specific Plans, and ensuring that our most sensitive habitat and archeological areas are protected through proactive conversations. I anticipate that as Preserve members and staff become more familiar and comfortable with the process, these issues will largely abate.
3. The 2018 Fuel Management Standards focus on the importance of working "from the structures outward and from the ground up." This directs the Conservancy to work closely with landowners and the CSD to coordinate on Wildlands Fuel Management in proximity to roads, CSD infrastructure and homes. Broad-scale fuel and weed management in Wildlands outside of these areas is a lower priority according to the experts, and is also beyond our existing resources and capacity, other than through expanded targeted grazing and prescribed fire, as noted below.

Easement Stewardship:

Preserve Lands Committee: One area of coordination that continues to go well is the 'Preserve Lands Committee,' initiated in 2018. The CSD, SLPA, and SLC (Forrest A., Kelly D. and Christy F.) have met on several occasions to address concerns relating to Openlands impacts, with positive results. No new issues have come to our attention in the past 3 months.

Conservancy/Design Construction Services (DCS) Coordination: At Kelly Dyer's request, the Conservancy and DCS are reconfiguring their shared duties regarding the monitoring of residential construction sites, with DCS taking the lead on any compliance requirements and the Conservancy focusing its monitoring efforts on Openlands protections and directing any substantive concerns to DCS rather than directly to landowners/contractors. While the initial roll-out of this has been a little rocky in terms of internal communications, this system has merit and Kelly and I are working out the issues with our teams.

Design Review Board: The matter of how the Conservancy will engage with the DRB and who will cover the cost remains unresolved. I anticipate Board re-engagement in this matter will be needed.

Invasive Weed Management: One of the most pressing and vexing issues facing the both the natural and human communities of the Preserve is the continued expansion of nearly a dozen species of invasive non-native weeds, as well as the advance of aggressive native shrubs into grasslands areas. The Conservancy flagged this concern as a top priority in 2015 and has dedicated extensive resources, including over \$100,000 in grant funds, to direct weed eradication as well as working in partnership with Preserve owners and the CSD. In the last year, owners have initiated over a dozen new weed management and grasslands restoration projects with Conservancy and CSD support, and the Conservancy is providing technical guidance and 'loaner' equipment to support these efforts. Jenna Allred, a weed management specialist, has joined the Conservancy team, and with her leadership and the support of Rodrigo Sierra, our grasslands ecologist, the Conservancy will continue to manage weeds in Wildlands and assist landowners on Openlands projects throughout 2018 and 2019.

Challenges in 2019:

1. Many landowners are out of patience with this issue, and want immediate, dramatic results. The CSD, Ranch and Golf Clubs are also under pressure to manage weeds and are looking to the Conservancy for leadership and material support.
2. The Conservancy must continue to play a leadership role in weed management, but we will not succeed without broad support and engagement. Every Preserve team with land management duties has a role to play, with the potential to be a valuable part of the solution, or alternatively to contribute to the problem, whether through the timing of mowing, use of blowers in high weed-seed areas, or other routine activities that may have unintended consequences. This is a very sensitive issue for all involved, with potential to lead to mis-communication or friction among our teams.
3. The preliminary results of using of grazing to help control weeds and brush encroachment are promising, but we are not there yet. By broadly expanding the grazing area without increasing herd size over the past 2 years, we appear to have diminished its effects: early positive results in grazed areas have been muted, slowing our momentum and risking the faith of the community in this approach. To be successful, we need to restrict our grazing to smaller areas, or expand the program.

What We Are Doing:

1. Since her arrival this summer, Jenna has already conducted a 'rapid assessment' of immediate priorities and addressed a number of stands of emergent and highly threatening weeds. This 'early detection/rapid response' approach will remain critical, and Jenna will be reaching out over the winter to develop partnerships with the CSD and Clubs to engage them in this effort. She is also identifying options for labor through the California Conservation Corps, Sheriffs' 'Honor Crews' or other resources to help address the scale and scope of our need and has purchased a mower that will

increase our ability to directly address brush in priority areas including along Rancho San Carlos.

2. As a next step, Jenna and Rodrigo will be tasked in early 2019 with the development of a weed management plan for the Preserve that will identify strategies, priorities and partnership approaches for weed control. Special attention will be directed to sensitive habitat, recreational areas and scenic corridors. The CSD, SLPA and Clubs will be invited to participate, and a collaborative, integrated approach will be proposed, with resource needs and potential funding sources identified. The planned update of our Conservation Blueprint, (also called the Biodiversity Management Needs Assessment or BMNA) will help put this weed effort in perspective relative to other resource threats and needs, allowing us to ensure appropriate resource allocation and understand opportunity costs.
3. The Conservation Grazing Team has presented a proposal for expanding the cattle herd in a step-wise fashion over the next five years to increase the scale and intensity of grazing to meet ecological goals and abate weeds and brush. Grazing alone will not be sufficient to fully control grasslands weeds, but is almost certainly the core essential tool for any sustainable grasslands management effort. This proposal is detailed elsewhere in the Board Packet and will be presented at the meeting.
4. Dr. Christy is leading an effort to prepare the Preserve and Conservancy teams for reestablishing prescribed fire on the Preserve. Christy, Kyle and Rodrigo have received intensive fire training, and Jenna will be trained in the summer of 2019. While the scope will be limited, prescribed fire can be a valuable and cost-effective tool for weed management and habitat restoration where appropriate.