



Big Vision, Bold Plan for the Changing West

The Sonoran Institute Strategic Plan

Adopted June 2007





The Sonoran Institute inspires and enables community decisions and public policies that respect the land and people of Western North America.

From building railroads and dams to conserving public lands, the West has long been the home of big, bold ideas.

Now is the time for another one — an ambitious goal for a West where civil dialogue and collaboration are hallmarks of community decision-making; where clean water, air and energy are assured; and where healthy lands, resilient local economies, and vibrant communities reflect a West, “both prosperous and healthy, with a society to match its scenery,” as the great writer Wallace Stegner envisioned.

Inspired by that vision, the Sonoran Institute has a new strategic plan that sharpens our focus and ensures the best use of our time, skills, funding and passion for the land as we tackle rapid unplanned growth, the role of public lands and many other challenges in the rapidly changing West. This booklet provides a look at that plan.

We are grateful to the Packard Foundation for underwriting the process that produced our new plan. I also want to express sincere appreciation to Steve Yaffee of the University of Michigan for guiding the process and to the Sonoran Institute Board of Directors and staff members for their input and efforts.

Since 1990 the Sonoran Institute has brought together local officials, business people, ranchers, conservation advocates, developers, public-land managers, and engaged citizens to successfully forge effective and enduring conservation solutions.

I continue to believe that we can either be victims of change or we can plan for it, shape it and emerge stronger from it. The Institute is a leader on the latter path.

Luther Propst, Executive Director



The Sonoran Institute worked with community leaders and land managers to establish the 142,000-acre Las Cienegas National Conservation Area in 2001.

Introduction

In June 2006 the Sonoran Institute initiated a year-long process to chart its future growth and consolidation as a leading West-wide conservation organization. Our planning effort was driven by two concerns. First, we realized that western North America (the West) is undergoing profound changes with significant implications for the Sonoran Institute's mission and work. Second, the organization's board and staff leaders placed a priority on better defining and establishing our identity as a West-wide conservation organization.

The strategic plan, adopted by the Board of Directors in June 2007, guides the Institute on where and how to best apply our resources in a West in the grip of rapid growth and change.

Context for the Sonoran Institute's Work

Since 1990 the Institute has carved out a unique niche in the conservation community thanks to four themes that permeate our work:

- We are a community-based organization; that is, the actions we take are informed by and support local conservation efforts.
- We emphasize collaboration that involves multiple stakeholders, such as conservation groups, civic and business leaders, ranchers and other land owners, developers, public land managers, and government officials.
- We approach land conservation with a full range of strategies, from outright protection of land to managing growth to integrating conservation and community values into land development.
- We demonstrate that conservation and land-use planning are key elements of community well-being, quality of life and economic prosperity.

These hallmarks of our work are still relevant — indeed, critical — to the success of conservation efforts in the face of extensive changes that lie ahead for the West. Consider **four key trends** that inform our work and influence the West's health and prosperity:

Land development is occurring at an unprecedented rate and scale as a result of extraordinary population growth and low-density land-use patterns and will continue to generate additional demands for water and energy.

Global climate change is exacerbating these demands by decreasing stream flow and groundwater recharge and intensifying drought-and-flood cycles, and it is accelerating the loss and fragmentation of wildlife habitat.

Energy development has gripped parts of the West providing a temporary spike in high-paying jobs but leaving communities with long-term social and environmental impacts for which they are unprepared.

The West's changing economy, with iconic landscapes, scenery, recreation and large expanses of open space as competitive advantages in a globalizing economy, is fueling much of the growth and development — now and in the future.

“We can either be victims of change or we can plan for it, shape it and emerge stronger from it.”

Luther Propst



With rapid growth and poorly planned development carpeting the West, we are ramping up our work for smart growth and to reform state and federal land-use policies. We work West-wide with the Lincoln Institute of Land Policy to promote smart growth.

Sonoran Institute Values

Respect for land:

- Love of place
- Conservation
- Healthy landscapes

Respect for people:

- Civil dialogue
- Collaboration
- Broad participation in public policy decision-making
- Local stewardship

Resilience:

- Inter-connected economic & natural systems
- Adaptability
- Opportunity
- Optimism
- Diversity

Knowledge:

- Sound science
- Traditional wisdom
- Big-picture thinking
- Practical solutions

Mission & Vision

These trends present significant challenges to realizing lasting conservation outcomes, yet from our entrepreneurial and optimistic perspective they also represent opportunities to apply our approach to conservation and advance our mission for the West.

The Sonoran Institute's mission is to inspire and enable community decisions and public policies that respect the land and people of western North America.

While our new mission statement remains true to our roots as a community-based conservation organization, we realize that successfully carrying out our mission requires that we foster a prosperous and healthy West. This is our vision:

Our passion is to shape a North American West with healthy landscapes vibrant with human and wildlife populations living in harmony with the environment. It is a land in which robust local and regional economies are new models of collaborative efforts, which will guarantee a future of clean energy and water, fresh air and a dedication to the positive interdependence of people and nature. Through civil dialogue, collaboration and applied knowledge, we work toward a shared community vision of lasting conservation and prosperity.

How We Work

We will continue to employ and adapt the **five key strategies**, described below, that have defined our work to date; we will also develop new emphases and approaches that reflect new conservation challenges and opportunities. Throughout, our work reflects key values (see sidebar) that define the Institute as a community-based conservation organization.

First, we improve land-use, growth and resource management through place-based projects. Increasingly, both ecosystem science and our experience tell us that for these management activities to be effective they must be designed and carried out on a broader scale. Moreover, the widespread impacts of growth and global climate change require cooperation across jurisdictions and land ownerships, reaching up to engage both state and federal governments. Given our collaborative orientation, the Sonoran Institute is uniquely positioned to play a constructive role in fostering regional planning efforts.

Second, we enhance the capacity of decision-makers and communities to manage growth, promote conservation and create sustainable futures by providing them with information and tools. We anticipate a demand for new tools to better understand the impacts of growth and global climate change and to demonstrate how local land-use decisions and sustainable energy policies can mitigate and adapt to those impacts, while producing significant economic and environmental benefits. Building on our ability to document and explain socioeconomic trends, we will take advantage of newly emerging tools to assess the environmental, social and economic impacts of various land uses.

Third, we enhance the capacity of decision-makers and communities to manage growth, promote conservation and create sustainable futures through training, networking and leadership development. We train community teams, not just individuals, and we provide follow-up assistance to those who are eager to apply what they have learned. Given the breadth of challenges the West faces, we now seek to encourage

Six citizen teams from across the Mountain West attended our Community Energy Futures Institute to explore strategies for sustainable energy use in their communities.



them, whether elected officials or community leaders, to work on a broader scale and advocate for public policy reforms at state and federal levels.

Fourth, we expand public awareness of the need for conservation, growth management and sustainable solutions by defining a healthy and prosperous West along with best practices and examples for how to achieve it.

This is an opportune time to build a broad-based grassroots constituency by transforming the public's increased concerns about growth and global climate change into effective action. Through our work across the West, we see a diverse conservation constituency emerging. To expand and nurture it will require that we articulate an inclusive vision for the West that links a healthy environment to economic prosperity and community well-being, as well as communicate community successes and lessons learned.



The Sonoran Institute-Lincoln Institute of Land Policy Joint Venture is an active part of an effort to create a model for sustainable desert communities in the Superstition Vistas, 275 square miles of state trust land in the path of metro Phoenix growth.

Fifth, we advocate for public policies that better protect natural areas, ensure sustainable resource uses, and provide the authority and resources to manage growth. Most local jurisdictions, state natural resource agencies, and public land managers do not have the authority or resources to grapple with issues that inherently cut across multiple jurisdictions, yet they will have to work collaboratively if they are to effectively address such issues and challenges that lie ahead. We will continue to advocate for practices and policies that facilitate collaboration among state and federal land management agencies and adjacent communities and landowners. We will engage on water, energy and other public policy issues at state and federal levels that benefit communities and conservation in the West. In many instances, our role will be to facilitate new, broad-based coalitions and alliances and build the best case for reform.

Defining the Sonoran Institute's Future Work

By implementing our strategic plan, the Sonoran Institute will scale up to meet the West's challenges in the coming years. Our primary geographic focus will continue to be the Arid West of the United States and northern Mexico. This region is experiencing rapid growth and is also especially vulnerable to global climate change. (We will look for partners to continue to assist community-based conservation efforts in the Canadian Rockies.)

Our agenda addresses public lands, growth, water, energy and climate change — the core issues that define how the West will grow and change. We will expand and deepen our work in two principal ways:

1. Carry out long-term, multi-faceted ***Legacy Programs*** in discrete landscapes, applying the full range of our expertise and conservation approaches to promote smart growth and sustainable energy, conserve public lands, and better manage water resources.
2. Develop a deeper and more systematic focus on ***state and federal policy reform*** that provides greater authority and resources for communities and land managers to better manage growth and protect their — and our — natural heritage.

“The Sonoran Institute is doing the most important conservation and land-use work in the West.”

Chris Duerksen
Land Use Attorney
Denver, Colorado



Legacy Programs

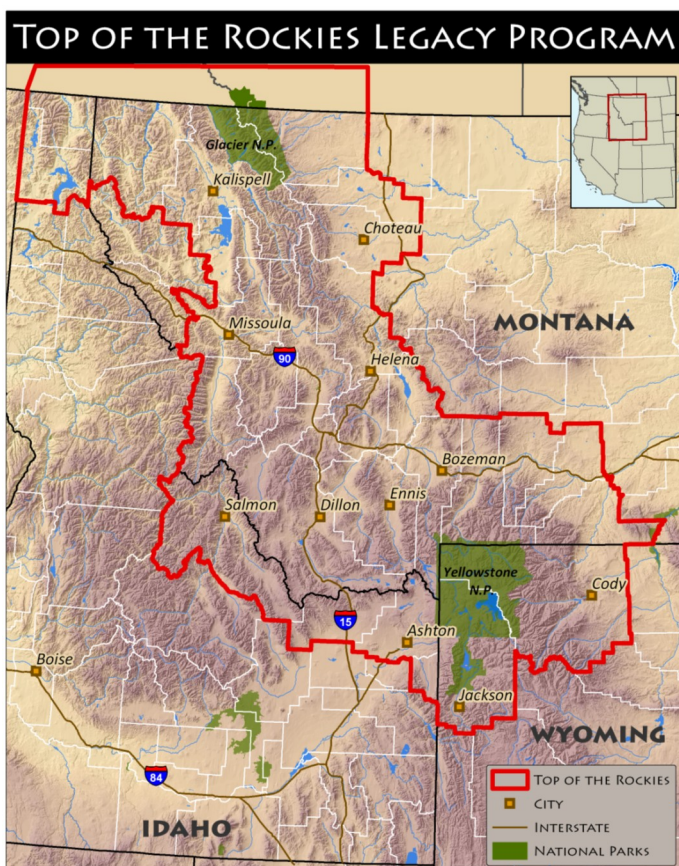
The Sonoran Institute is launching a series of keystone initiatives in specific landscapes, each of which tackles growth-related challenges in differing contexts. We expect these projects to positively influence other areas in the West and to enrich communities and lands that future generations will want to enjoy and protect.

Sun Corridor – Urban and Suburban Growth

Arizona is neck-and-neck with Nevada as the fastest-growing state in the U.S. Over the next 20 years, Phoenix and Tucson — 100 miles apart — will merge to become one of the country's 10 mega-regions, home to more than 10 million people. Sometimes referred to as the “Sun Corridor,” this area's prosperity — and the state's — will be determined by how well it competes for human and financial resources in a global economy. To maintain a competitive advantage, Arizona must protect and enhance its quality of life. The Sonoran Institute will work to create a world-class model for a sustainable desert community, a commuter rail system between Phoenix and Tucson, additional conservation designations for a million acres of the Sonoran Desert, and new state policies to preserve remaining free-flowing rivers.

Top of the Rockies – Public Lands, Wildlife, Rural Communities

This region is home to abundant wildlife and celebrated wild areas — Glacier National Park and the Bob Marshall Wilderness in Montana, the Frank Church-River of No Return Wilderness in Idaho, and the Greater Yellowstone ecosystem. Despite vast public lands, private land development threatens key wildlife corridors and winter range. The Institute will help communities shape growth to allow wildlife and humans to better coexist by promoting smart growth, collaboration with public land managers and economic development around existing natural and cultural assets to protect scenic vistas, open spaces, small-town character and wild lands.



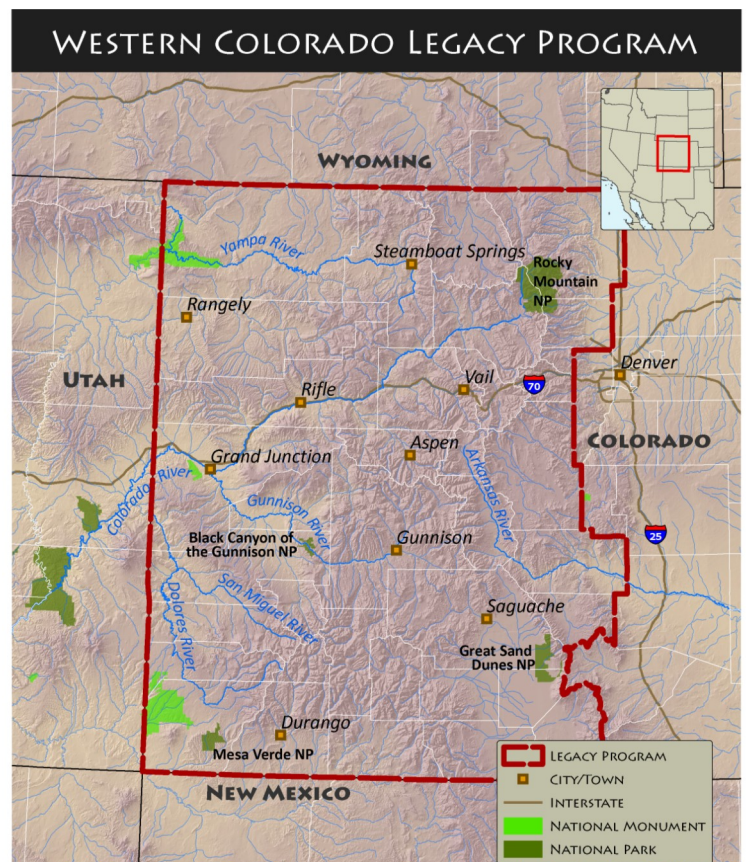
Upper Gulf of California – Riparian and Wetlands Restoration, Sustainable Economic Development

The Delta of the Colorado River is a remnant of its former self, yet remains an internationally significant wetland, a key stopover for migrating birds along the Pacific Flyway, and a leading source of freshwater to the Upper Gulf of California, which is facing large-scale coastal resort development. The potential for the Delta's restoration is enormous, and the cost is relatively modest. Sources of funding in the U.S. may be available for restoration, but bi-national agreements are necessary to use these funds for restoration. The Institute will work to restore and protect more than 160,000 acres of the Delta, acquire water necessary to re-establish freshwater flows to ensure the Delta's long-term recovery, and ensure that tourism and resort development in the Delta and Upper Gulf protect environmentally sensitive areas and provide economic opportunities for local residents.



Western Colorado – Energy & Climate Impacts; Amenity-Community Growth

Profound long-term trends are having wide-ranging social, economic and environmental impacts in western Colorado. It is home to some of the country's fastest-growing communities as skiers, retirees and seekers of quiet are lured to its mountains and high valleys. This is also prime territory for oil and gas development, and uranium mining is resurgent. In addition, climate change is affecting snowfall, runoff and stream flow. Building on our work there to date, the Institute in 2008 will develop a comprehensive Western Colorado Legacy Program to promote smart growth and clean energy, mitigate oil and gas development impacts, preserve agricultural lands and wildlife habitat, encourage policies that adapt to climate change and support conservation of public lands to sustain amenity-driven growth.



West-Wide Policy Reform

The Sonoran Institute will significantly increase the resources we apply to reform state and federal policy and support legislation to give communities and public land managers the authority and resources to better manage growth and protect their natural heritage. We will employ these principal strategies for a deeper and broader impact in the Western policy arena:

Public lands conservation projects – We will expand our work with diverse local stakeholders, conservation advocates and government agencies to improve the conservation and management of public lands in selected Western landscapes. Long a staple of the Institute’s work, such collaborative efforts permanently advance protecting and managing public lands of high conservation value.

State smart growth policies – We will build and strengthen diverse state coalitions — initially in Montana, Wyoming, and Arizona — to advocate for improved state-level smart growth policies. The success of the Institute’s Montana Smart Growth Coalition provides a model for these efforts.

Federal policy reform – Building on our extensive county and community contacts throughout the West, we will create action networks of local officials who will engage in the federal policy arena to influence decision-makers on a broad range of conservation and smart growth issues. Bolstering these reform efforts will be our ongoing economics and land policy research on topics such as the impacts of growth and climate change, the changing economy of the West, and the changing role of public lands.

Strategic Partnerships – We will join with other organizations and agencies in developing new information and expanding policymakers’ and the public’s understanding of the need for policy reform. These partnerships bring invaluable expertise and experienced perspectives to Western policy issues. We are fortunate to include among our partners the Lincoln Institute of Land Policy, the National Association of Counties, U.S. Bureau of Land Management, and other state and federal agencies.

As we engage more on state- and federal-level public policy issues, our community work informs the experience and credibility we bring to those issues. We will emphasize partnering with communities to enhance, sustain and conserve livable places and healthy landscapes in the face of growth and change. We envision a process where each aspect of our work builds on and influences other aspects, creating a continuum of learning, doing and succeeding.

Given the rapidly changing environment in which we operate, we must be ready to assess new, unanticipated program opportunities. We have developed specific criteria to carefully evaluate such opportunities and to determine whether to pursue them.



In partnership with the National Association of Counties, the Sonoran Institute has trained and provided follow up assistance to more than 40 Western counties grappling with growth and land use planning.



How We Measure Success

What will the West look like if we are successful? We have identified a range of desired ultimate outcomes, which address both conservation and sustainability concerns:

- *Wildlife thrives with plenty of room to roam.*
- *Scenic vistas and open spaces are preserved.*
- *There is enough water for people and wildlife.*
- *Communities have clean, safe, reliable sources of energy.*
- *Land development integrates open space, mixed uses and sustainable transportation.*

To monitor our progress in realizing these outcomes for our Legacy Programs and our state and federal policy initiatives, we have developed specific, measurable benchmarks, such as: acres of land restored or permanently protected; acre-feet of water secured for conservation purposes; greater efficiencies in water, energy, and land uses; or greater reliance on renewable energy sources, recycled water, and public transit. For each of these benchmarks, we will establish baseline figures by which we can contrast conditions prior to and after our work is completed.

We also will identify intermediate outcomes and measureable benchmarks tied to our strategies, whereby we can evaluate our success in improving management practices, enhancing decision-making, expanding public awareness, and reforming public policies and processes.

Sonoran Institute Sample Successes 1990-2007

- Helped protect & restore more than 340,000 acres of public & private lands.
- Partnered in raising more than \$220 million in public & private funds for land conservation.
- Had major role in establishing nearly two dozen community organizations dedicated to conservation, smart growth, and/or sustainable development.
- Formally recognized by the White House, National Park Service, National Fish and Wildlife Foundation, Western Planners Association, & Arizona Planning Association for our conservation & land-use planning work throughout the West.

Organizational Implications

Carrying out the work described in the new strategic plan will require significant growth for the Sonoran Institute, involving new competencies, offices and other resources in support of programs. We have specifically identified the following needs:

New core competencies – We will hire experts in the field of energy, water, and transportation policy and land economics, as well as a federal policy director. We will open state policy offices in Idaho, Nevada, New Mexico, Utah and Wyoming.

Communications and development support in regional offices – We will hire regional communications staff for our offices in Bozeman, Phoenix and Grand Junction. We also will hire regional development staff for our offices in Phoenix and Grand Junction (we already have one in Bozeman) and a development staff person for events planning and board relations.

Organization-wide administrative and financial support – In addition to hiring staff, we also will upgrade our computer network and acquire video conferencing technology.

Program monitoring and evaluation – As part of more rigorous monitoring and evaluation of our programs, we will require staff time to collect, evaluate and report on key indicators (metrics) of our progress. There will be data collection costs as well.

Staff development – We will provide an in-house annual training program for mid-level staff, as well as a professional development fund for staff to attend outside training.

Conclusion

The Sonoran Institute envisions a West where civil dialogue and collaboration are hallmarks of decision-making; people and wildlife live in harmony; future generations are guaranteed clean water, air, and energy; and the region's society matches its scenery, with vibrant communities, resilient economies, and healthy lands. We hope you will consider an investment in achieving these goals realizing this vision for the West we all love and cherish.



At the Santa Lucia Preserve in Carmel, California, and other residential communities, the Sonoran Institute works with developers to integrate conservation into their projects.

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“The West ...

is the native home of hope.

When it fully learns that
cooperation, not rugged
individualism, is the quality that
most characterizes and
preserves it, ... Then it has a
chance to create a society to
match its scenery.”

Wallace Stegner
The Sound of Mountain Water



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