



REFRESHED WESTERN CONSERVATION STRATEGY

Prepared for The William and Flora Hewlett Foundation
by The Redstone Strategy Group, LLC

August, 2013

These materials were prepared as part of the Hewlett Foundation's internal planning process and do not represent actions to be taken by Hewlett Foundation staff or by grantee staff at the Foundation's direction. In particular, although some of the progress indicators, targets, or metrics may reflect the passage of legislation (based on inputs from grantees and experts in the field), the Hewlett Foundation does not lobby or earmark its funds for prohibited lobbying activities, as defined in the federal tax laws. The Foundation's funding for policy work is limited to permissible forms of support only, such as general operating support grants that grantees can allocate at their discretion and project support grants for nonlobbying activities (e.g., public education and nonpartisan research).

TABLE OF CONTENTS

INTRODUCTION	3
1. The Program will continue to pursue the ecological integrity of the West through work on land, water, and energy.	4
2. Three newly emphasized campaigns are expected to deliver major conservation gains.....	9
3. Continuation of several successful campaigns will complete the Program’s portfolio.....	15
4. The priority western strategies will be strengthened by new support for sophisticated advocacy.	19
5. The Program’s impact will depend on its budget level.	23
6. The Program will rely on an effective monitoring and evaluation approach.....	24

WESTERN CONSERVATION HAS BEEN ONE OF THE PILLARS OF THE HEWLETT FOUNDATION'S WORK for more than four decades. Since 1969, the Foundation has invested more than \$250 million to preserve the vast open spaces of the West as an unspoiled landscape where wildlife thrives, communities flourish, and ranchers maintain their history of stewardship (fig. 1). The Foundation's support has played a crucial role in protecting the West's biodiversity and helped make the conservation field what it is today.

Now, new opportunities are emerging for the Foundation's Environment Program to build on its past successes. Key elements are in place for major policy victories across the West—from protecting wild places from energy development to saving the planet's largest intact temperate forest. However, the conservation movement is only beginning to gather the strength and savvy it needs to win.

To increase that momentum and improve the chances for success, the Program is updating its Western Conservation strategy. This refreshed plan positions the Hewlett Foundation not only to secure major conservation victories in the coming years, but also to build advocacy power to sustain the movement in the future.

This document describes the refreshed strategy for presentation to the Hewlett Foundation Board at its September 2013 meeting.² Five elements form the core of this strategy:

1. The Program will continue to pursue the ecological integrity of the West through work on land, water, and energy.
2. Three newly emphasized campaigns are expected to deliver major conservation gains.
3. Continuation of several successful campaigns will complete the Program's portfolio.
4. The priority western strategies will be strengthened by new support for sophisticated advocacy.
5. The Program's impact will depend on its budget level.

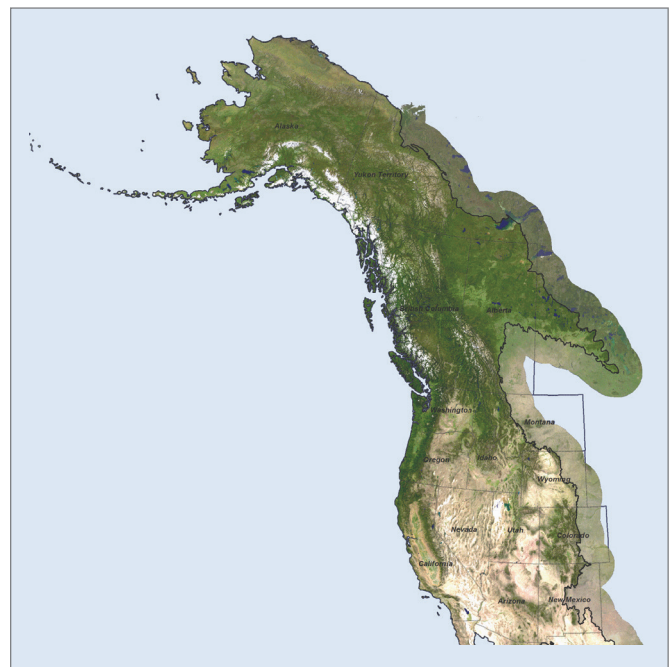


FIGURE 1 The West

² This strategy relies on the thorough evaluations the Program commissioned in advance of this strategic plan. We thank the science evaluation team of Mac Hunter and David Wilcove and the policy evaluation team of Ed Lewis, David Gardiner, and Dave Grossman for their efforts. These teams also provided many helpful comments on earlier versions of this document.

1

THE PROGRAM WILL CONTINUE TO PURSUE THE ECOLOGICAL INTEGRITY OF THE WEST THROUGH WORK ON LAND, WATER, AND ENERGY.

FIVE YEARS AGO, THE PROGRAM ESTABLISHED A VISION FOR ECOLOGICAL INTEGRITY IN WHICH western ecosystems and species would be protected within a mosaic of open lands and natural waters for the benefit of both people and wildlife. The Program understood that the grandeur, diversity, and integrity of the natural landscape play a critical role in the vitality of the communities of the region and the well-being of the entire nation; and that, likewise, the communities and ranchers of the West play an integral role in sustaining its habitats. The goal was to ensure that a healthy North American West is passed on to future generations.

Conserving the ecological integrity of the West requires that ecosystems and species are protected through a medley of representative—and permanently protected—lands and waters, and that social and cultural support for that protection are unyielding. More specifically, a review of current scientific literature concluded that “at least half of each ecoregion [should be] either strictly protected or [in] a mix of strictly protected and lightly used (and well regulated) areas,” and that goals should be met for individual species.³

This review also concluded that this large-landscape approach to conservation is the best overall response to climate change. While individual species may migrate in response to shifting climates, these moves are unpredictable. The best way to ensure resilience in the face of climate change, then, “is to ameliorate all the stressors that [ecosystems] currently experience.” Protecting “a diverse set of large, highly connected natural areas,” as the Program seeks to do, will build resiliency to climate change as well.

The Program’s objective remains unchanged. By protecting open landscapes, restoring freshwater flows, shifting toward renewables, and building broad-based support for conservation, the Foundation is creating a more sustainable future for the communities and habitats of the West. Figure 1 shows the geographic extent of this work, which stretches from the southwestern United States to Alaska, with the eastern edge defined primarily by ecosystems rather than political boundaries. The eastern edge is purposefully soft to emphasize that partnerships with neighboring regions can be an important way of achieving success within the Program’s geography.

³ Malcolm L. Hunter, Jr., and David S. Wilcove, “Western Conservation Strategy Science Review for the Hewlett Foundation” (internal document, 2013).

Even with stable goals, the Program recognizes that its strategies and tactics must adapt to shifting circumstances in order to be effective. As a first step, it commissioned a formal evaluation of its original strategy, reviewing what has and has not worked as expected, and how the world in which it operates is changing. This evaluation weighed the science undergirding the past strategy and the effectiveness of its policy initiatives. Now the Program is reconsidering its Western Conservation strategy based on lessons from the evaluation and completing a strategic plan that will guide the next five years of this work.

1.1 The Program has made great progress, but many challenges remain.

Since 2008, grantees funded through the Foundation's Western Conservation strategy have conserved land and water on a scale almost unimagined when the strategy was put in place, increasing protection for more than 230 million acres and nearly 3,500 river miles. Four particularly effective West-wide strategies—conserving the Boreal Forest, limiting off-road vehicles, defending sage grouse habitat, and protecting forests through the Roadless Rule—accounted for more than three-quarters of the Program's successes. These gains were all the more impressive since the overall political context was difficult. The Program's evaluation noted that the recession, the White House's support for an "all of the above" energy policy, and increasing anticonservation interests in Congress made the Program's successes far from given.

Yet much remains to be done to reach the Program's goal of protecting 764 million acres—50 percent of the landscape—across twelve U.S. states and three Canadian provinces (fig. 2). Despite progress during the past five years that brought the Program 15 percent closer to its goal, conditions in the West still fall short of that goal. The evaluation noted a few important challenges that the Program must overcome, including:

- **Building sufficient advocacy strength.** "While the conservation community has built considerable advocacy strength, it is not sufficient to make adequate progress in the next five years in the face of considerable political and economic obstacles," the evaluation concluded. Currently, the conservation movement is not able to mount a sufficiently strong, sustained, and savvy effort to engage President Obama's team on conservation issues and fight back against increasingly strident anticonservation voices.
- **Expanding the Boreal campaign to the Pacific Coast and Alaska.** The evaluation noted that coastal ecosystems were generally underprotected and that the Program's strategies there were not making major progress. While the campaign to protect the Boreal Forest stretching across Canada and Alaska was securing hundreds of millions of

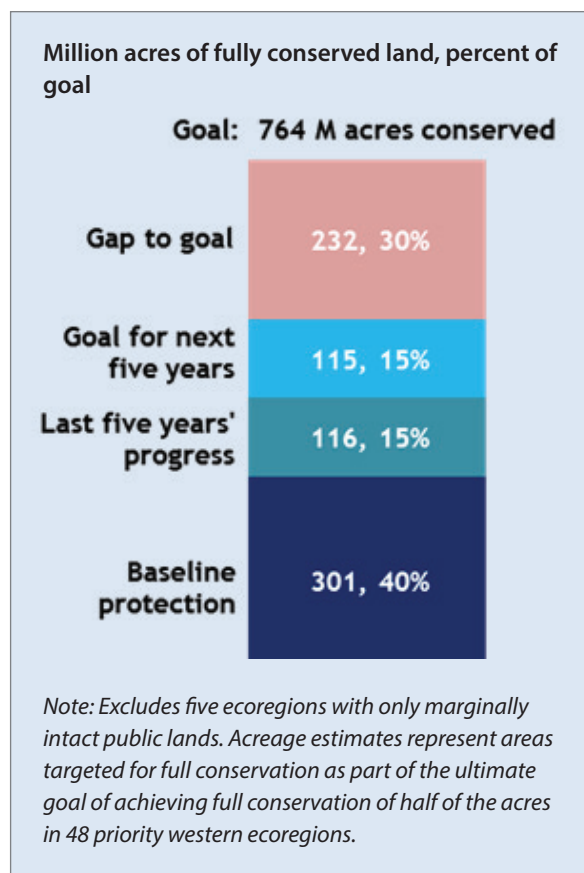


FIGURE 2 Progress toward western land conservation goal

acres of woodlands to the east, the campaign lacked the resources to expand into Alaska and made only minimal investments in British Columbia.

- **Conserving the Southwest’s fragile desert ecoregions and rivers.**

While West-wide policy successes can improve a wide range of conservation values such as biodiversity and habitat for rare species, they do not always benefit some of the most threatened ecoregions. Such is the case with southwestern deserts and their rivers, which are not well protected and which the Program did not help significantly in the past five years. The evaluation recognized that more than five years might be needed to make progress. At the same time, it encouraged the Program to lay the groundwork for conservation in the Southwest whenever possible.

While the Program expects to make major progress in addressing these challenges in the coming five years, it does not expect to meet its ultimate goal of conserving 50 percent of priority western lands in that timeframe. The final three years of the Obama administration may provide fertile ground for significant gains, but congressional obstruction and economic headwinds likely will continue and require investment in defensive campaigns. Should the United States elect a president hostile to conservation goals in 2016, gains are unlikely in 2017 and 2018, and defensive campaigns will be emphasized. That said, the Program should, and will, continue to ask when the ecological integrity of the West will be reasonably assured. When it is, the Program will decrease campaigns like those described here to a maintenance budget and explore other opportunities within—and perhaps beyond—the West.

1.2 Campaigns will conserve land, protect water, and reduce reliance on fossil energy.

After careful study and advice from its evaluators, the Program has opted to retain the fundamental organization of its work. It will continue to invest in a set of campaigns under three major components—land, water, and energy—to achieve its overall goal (fig. 3).

Given the Program’s success over the past five years, many of the proven strategies used to achieve these goals will remain consistent, such as building locally supported campaigns for Wilderness Areas and restoring crucial river systems. These campaigns remain an integral part of the Program’s strategy. However, the Program is also increasing investment in new areas and innovative strategies to maximize its effectiveness, such as engaging in a broad energy campaign and building a new generation of grantees with sophisticated policy advocacy skills.

These new investments demonstrate a greater emphasis on the policy-focused strategies that have proven most effective over the previous five years. There are five main assumptions underpinning this policy focus:

- **Large gains in ecological integrity will be principally achieved through public lands policy.** The Program’s greatest impact in the last five years has come through four successful policy campaigns aimed at

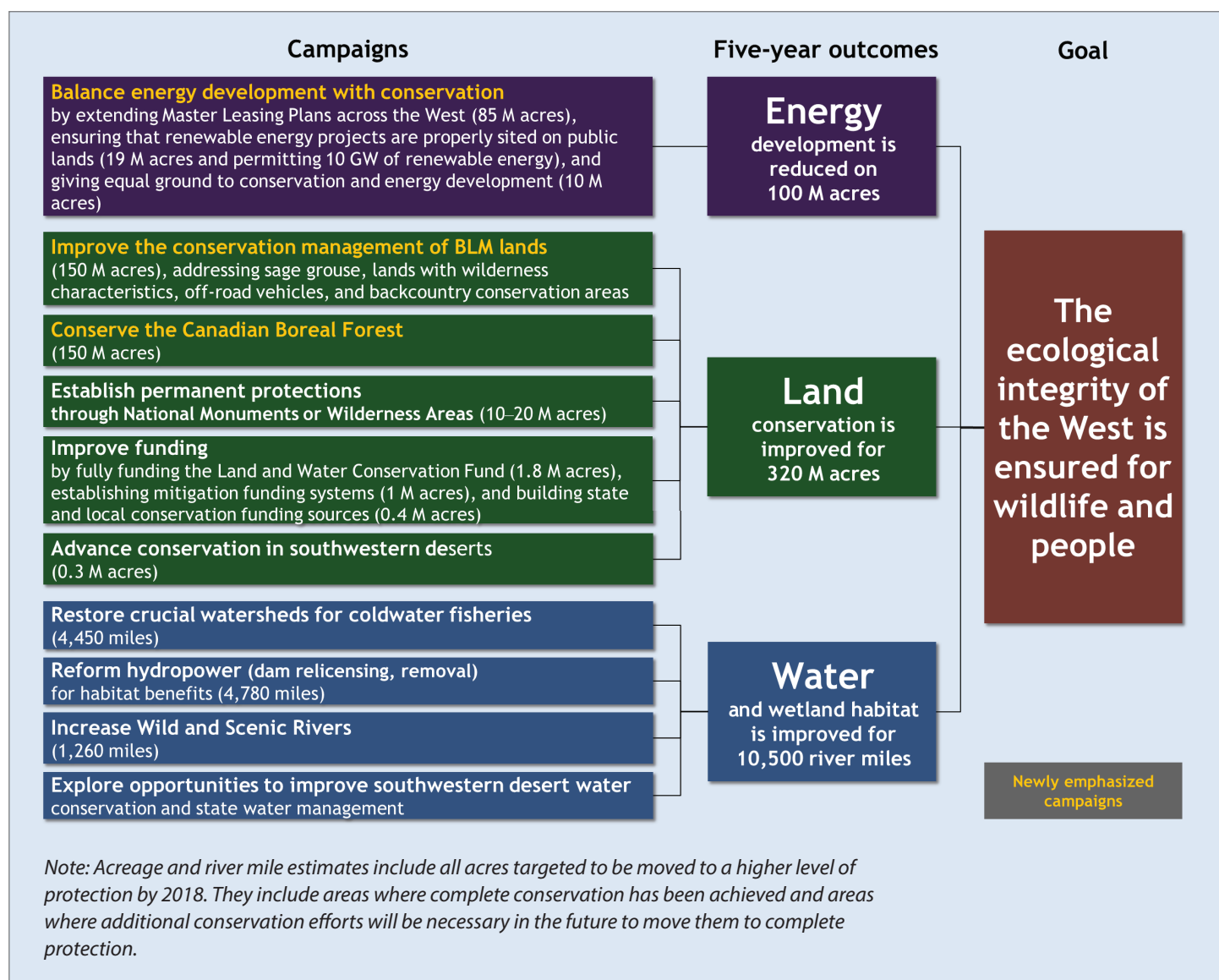


FIGURE 3 Western Conservation Logic Model

improving the conservation of public lands writ large, rather than at protecting specific privately held or public land parcels. Given that the majority of western land is publicly owned, much of the Foundation's work will focus on public land and water conservation. Because connections between large publicly conserved areas are often on private land, some of the Foundation's efforts will be directed toward increasing public funds available for private land conservation.

- **There is a three-year opportunity for major victories.** The final three years of the Obama administration represent the best chance in more than a decade for conservationists to secure supportive policies. While the president was cautious about public lands protection in his first term, his second term presents considerable opportunity to establish a strong legacy of public lands protection.

- **Planning needs to be balanced with flexibility in order to take advantage of policy windows.** Favorable timing is essential for success, yet often unpredictable. While the Program should articulate its grantmaking plans and carefully consider strategic alternatives, it also must be prepared to apply its strategy where and when it will be most effective to do so.
- **A strategy based in science will result in better policy objectives.** A science-driven Program will be able to promote policy proposals that are more effective at conserving the West and carry more influence with the agencies that manage the West's public lands.
- **The Program will have the capacity to manage a diverse portfolio of policy objectives.** Managing a diverse portfolio is difficult, particularly given the focus on West-wide policy campaigns. To help ensure success, the Program's management will set priorities and engage fully in only a few major campaigns.

2

THREE NEWLY EMPHASIZED CAMPAIGNS ARE EXPECTED TO DELIVER MAJOR CONSERVATION GAINS.

THE REFRESHED WESTERN CONSERVATION STRATEGY PROPOSES EMPHASIZING THREE CAMPAIGNS that pick up where previous victories left off: minimizing the environmental impact of energy development, conserving important lands in the western United States, and protecting at least half of the 1.2 billion-acre Boreal Forest in Canada and Alaska. Each campaign will include a mix of new and old approaches, enhancing conservation values and creating a political environment receptive to more traditional protection efforts.

These three campaigns were chosen for special emphasis among more than a dozen alternatives. To select these focus areas, the Program sought expert opinions, analyzed potential ecological benefits, and estimated the risks and costs of each campaign. These campaigns stood out for their potential to deliver major conservation benefits and the urgent need to invest in them before a window of opportunity closes. The Program will maintain investments in its other successful land, water, and energy campaigns, described in Section 3.

2.1 The balanced energy development campaign will sharply diminish the largest threat to the West.

The exploration and production of energy from fossil fuels is the largest driver of habitat loss in the West. Already a spiderweb of roads and well pads fragments the landscape, breaking up the large, connected tracts that plants and animals need to thrive. Public pressure for more domestic energy production is making conditions even worse, as the oil and gas industry seeks to drill in basins never before considered under threat. With promises of job creation and energy independence, the industry is attempting to define public lands as a resource to be developed.

This campaign will work to balance energy development with smart planning and projects designed to increase ecological integrity across the region. The aim is not only to protect a share of the millions of acres directly threatened by energy development (fig. 4), but also to lay the foundation for placing millions of additional acres of undeveloped lands into strict protection through related conservation campaigns. Doing so will directly challenge the notion that public lands are merely resources to be exploited.

Three main actions will achieve this goal:

- Extend Master Leasing Plans (MLPs) across the West, reducing the fossil fuel threat on 50 to 100 million acres.** MLPs, a signature initiative of former secretary of the interior Ken Salazar, attempt to zone oil and gas development in a manner that maintains or improves the natural values of the landscape. Prior to MLPs, an oil company could nominate most parcels of land for development and trigger only a site-specific review. The Bureau of Land Management (BLM) did not consider the broader implications of development. MLPs, in contrast, often stipulate phased leasing, minimal surface disturbance, and reclamation across an entire region; they may also demand mitigation that can generate funding for offsetting conservation on other lands.
- Ensure that renewable energy projects are properly sited on public lands, speeding the transition to carbon-free energy and removing 19 million acres from inappropriate development.** With Foundation support, conservationists succeeded in establishing a model for responsible solar development in the Southwest that is making possible a rapid rise of renewable energy development on public lands. The Program shifted the focus of activists from reacting to particular projects to identifying appropriate locations for development across a broad landscape. This campaign will seek to lock in the gains promised by this new model and extend the approach to major wind developments and associated transmission corridors. Initially, the strategy will focus on Wyoming, where the BLM is forming a statewide wind plan that likely will set the framework for development nationwide.
- Set the conditions to protect 10 million acres of wilderness by giving equal ground to conservation and energy development.** The campaign will fund efforts aimed at encouraging the Obama administration to place one acre of land into protection for each acre of land it opens to development. This campaign makes clear the need to both restrict drilling and increase permanent protection. An early estimate suggests that the campaign should target a commitment of 10 million acres to offset President Obama's drilling expansions. While this campaign will create the pressure to protect more land, the land conservation campaign (below) will develop a specific suite of policy proposals.

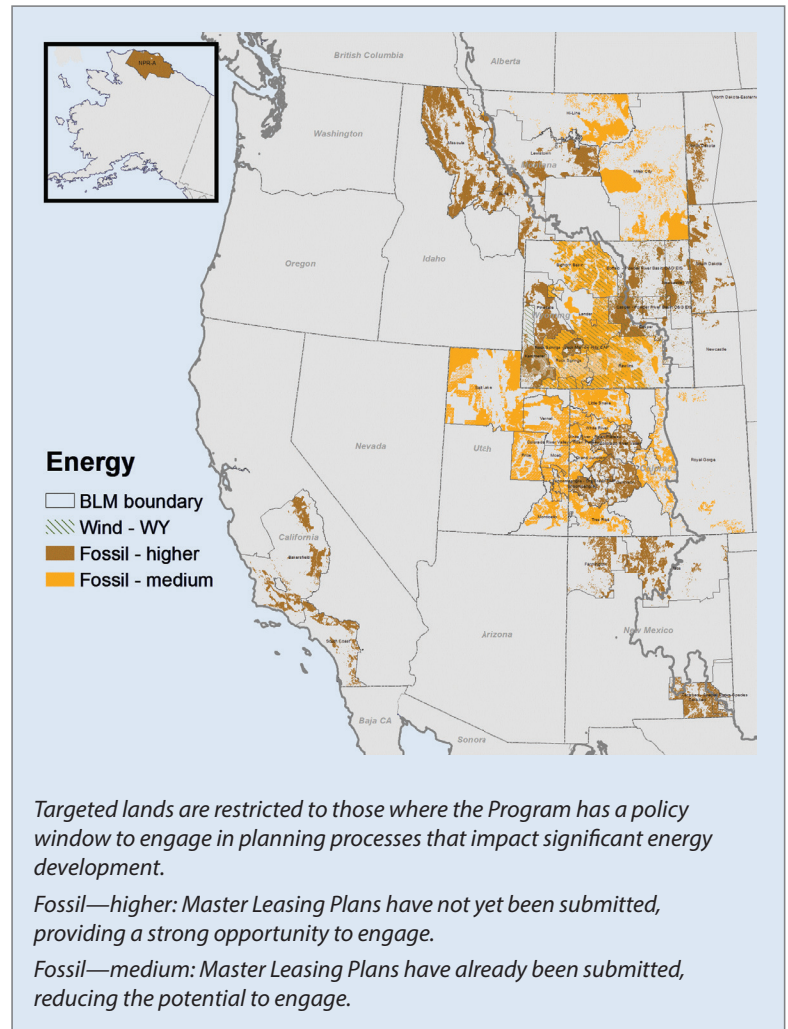


FIGURE 4 Potential focus areas for reduced energy development

This campaign will also include coordination related to a few areas of overlap between the Western Conservation strategy and the Environment Program's investments in energy and climate. One example of such a link is the effort to reduce coal mining, which will protect important habitat while reducing access to high-carbon coal. Any similar investments that fit into both Western Conservation and Energy and Climate strategies also will be tightly coordinated among Program staff members.

The Program has an important window of opportunity to take on this work since the campaign will succeed only under a friendly presidential administration. The conservation movement has steadily bolstered the Obama administration's concern for both climate and conservation, and only three years remain to capitalize on the opportunity it has created. In 2017, the Program will reexamine its priorities in light of the presidential election. Congressional or legal strategies may rise in importance if the new administration is friendlier to energy development than to conservation.

Experts interviewed for this strategy recommended that the Program allocate nearly 30 percent of its budget to this campaign, nearly double the recommended allocation to any other effort. While that level of investment is infeasible, fortunately it appears that the Foundation will have partners. The Wyss Foundation increasingly is recognizing the role energy policy plays in its strategy to permanently protect public lands and believes there is more room for productive funding. With its flexible budget, it likely can be convinced to match increases in Hewlett Foundation funding if this work is framed as one of the Foundation's major priorities.

2.2 The conservation lands campaign will place conservation at the heart of public land management.

The Program has three broad strategies to conserve public lands: engage with public agencies to improve the management of specific areas; seek executive proclamations that permanently protect lands as National Monuments; and support efforts that result in congressionally designated Wilderness Areas. Each of these strategies is important in the long run. In the next three years though, the Program's greatest opportunity is the first strategy: improving the BLM's oversight of the public estate. The Program will focus on the BLM in the near term, while continuing efforts to establish National Monuments and maintaining the flexibility to ramp up Wilderness campaigns when a policy window opens.

The BLM controls over a quarter of the Program's geography in the United States. Yet, at a time when the need for landscape-scale conservation has never been more apparent, much of the BLM bureaucracy continues to see resource development as its primary function. More than 85 percent of its land remains unprotected. This is in stark contrast to the Forest Service, which also operates under a multiple-use mandate from Congress but recognizes the need for conservation. The result is vast swaths of BLM land that are not managed to protect their ecological values. Fortunately, 70 percent of the lands the BLM manages will be involved in planning processes over the next five years (fig. 5).

In addition, the Obama administration is likely to allow progressive land management plans to take hold.

Conservationists will improve BLM practices by engaging in Resource Management Plan (RMP) revisions. Approximately 160 RMPs govern BLM lands across the West, each covering an average of several million acres of territory and guiding management for a few decades. Since the Foundation does not have the resources to engage in every RMP, it will leverage its support by targeting West-wide policies that benefit multiple districts and engaging on the ground only in priority regions (e.g., the underprotected southwestern deserts).

The Program currently invests approximately \$2 million per year on tactics that would be included in this campaign, and the refreshed strategy proposes investing \$3.7 million. This increased investment would tie the campaign together by increasing grantees' capacity to coordinate and allowing the Program to engage the BLM across the West using a suite of tactics:

- **Restricting off-road vehicle access on 60 million acres.** Foundation grantees succeeded in greatly limiting the free access previously offered to off-road vehicles on public lands. In most places, driving has been prohibited in areas without roads. Yet, off-road vehicles still make use of an extensive network of legacy paths that fragment the West. Conservation groups can close these roads and protect the fragile lands they run through by pushing for enforcement of fifty revisions to Resource and Travel Management plans.
- **Inventorying and protecting more than 80 million acres of lands with wilderness characteristics.** Although advocates have consistently argued that the BLM is required to protect wildlands, the official list of these lands is outdated and incomplete. Conservation groups can ensure that the BLM rectifies its undercounting of wilderness areas and protects all of the appropriate land.

Protecting core areas of sage grouse habitat on 20 to 40 million acres of public land. One of the Foundation's major successes in the past five years was securing guidelines to protect the strongholds of the sage grouse—a bird that was once ubiquitous in the West but is now on the brink of being listed as an endangered species. Sage grouse also serve as an important, if imperfect,

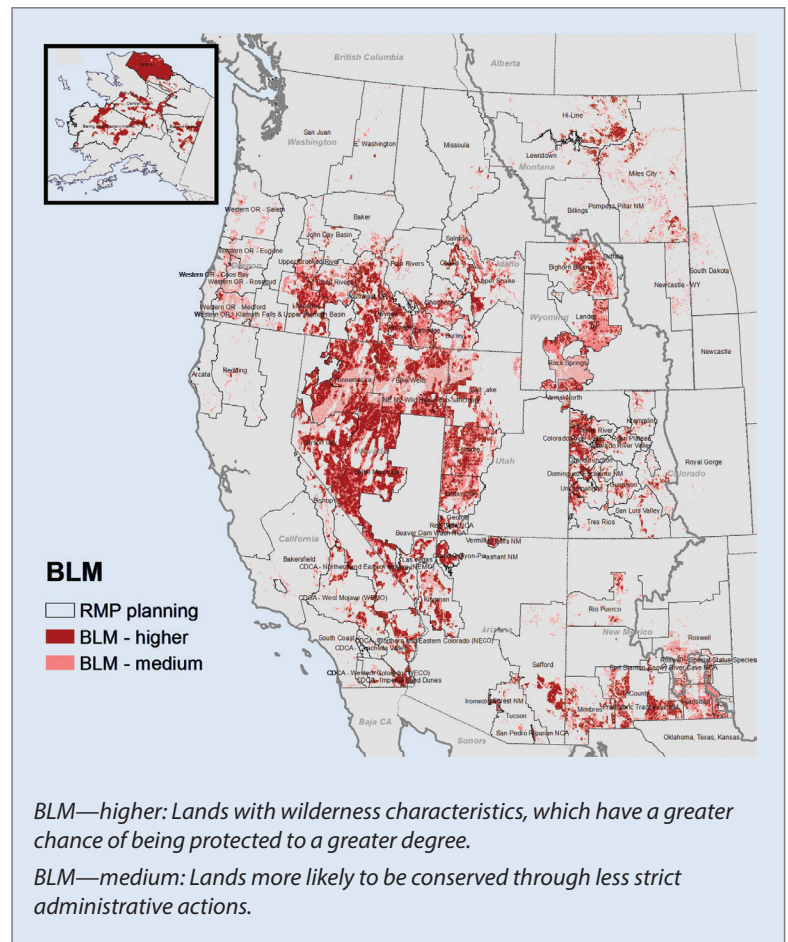


FIGURE 5 BLM lands that are a conservation priority

indicator species for the fragile sagebrush ecosystem. Generally, if the sage grouse population is doing well, then the rest of the plants and animals in the ecosystem are also. While agency-wide BLM policy guidelines are important, identifying and securing protection of these areas still rely on convincing individual BLM offices to alter their management.

- **Promoting Backcountry Conservation Areas on 10 million acres.**

The Program will invest in introducing and expanding Backcountry Conservation Areas to strengthen sportsmen’s voices for conservation and create a tool that can be deployed throughout the West. Backcountry Conservation Area policies give the BLM a way to protect wildlands important to sportsmen by improving habitat integrity and preventing development that would hinder later campaigns for permanent protection.

The favorable policy environment over the coming years also suggests that the Program develop a strong National Monuments campaign. The Program expects a natural policy window for large-scale National Monuments to be open through late 2016, when President Obama leaves office. Grassroots organizing is needed now to build the support the president will require to make new declarations in 2016. More than fifteen new Monuments covering around 8 million acres are possible.

In contrast, there is a relatively low likelihood of success in the coming two to three years for major campaigns to protected land under the federal Wilderness Act. Wilderness gains in Congress tend to come in short bursts after many years of preparation, and congressional dynamics will likely prevent a major bill from passing in the next two years. Still, the Program will continue to invest at a lower level. It is only a matter of time—likely in 2015 or 2016, after leadership changes in the House—before pressure from other members of Congress in both parties leads to a breakthrough. In addition, the field must maintain its expertise and experience so that it can ramp up capacity to respond whenever a policy window opens.

2.3 The Boreal Forest Conservation Initiative will expand protection of the largest intact temperate forest on earth.

Supported by the Hewlett Foundation and directed by The Pew Charitable Trusts, the International Boreal Conservation Campaign has led to conservation on an unprecedented scale. More than 150 million acres of Canadian forest are now under strict protection, and nearly as many additional acres have been placed in sustainable management.⁴ The long-term goal is to see half of the 1.2 billion-acre forest in strict protection and the remainder managed in a sustainable manner. The Boreal campaign estimates it can secure another 150 million acres of strict protection across the Boreal by 2018 if commitments hold. These

⁴ Ed Lewis, “International Boreal Conservation Campaign Evaluation: A Report to The William and Flora Hewlett Foundation” (internal document, 2013). Hewlett Foundation funding in the past five years secured approximately 115 million of these acres, the majority of which were placed in sustainable management.

gains will expand protection to the Pacific coast, preserving those threatened ecoregions as recommended by the evaluation.

The Program will continue to support the Boreal campaign across Canada in recognition of the nationwide scope of the environmental threat: restricting support to the West is neither practical nor likely to result in victory. The campaign has five strategies to protect the remainder of the Boreal: (1) secure conservation commitments from provinces; (2) support local land use planning, particularly with First Nations communities, to translate provincial commitments into action; (3) reform antiquated mining laws that subject the Boreal to claims without significant oversight; (4) improve management of existing timber tenures through negotiations with forest product companies; and (5) build public support.

The Program currently invests \$2 million annually in the Boreal campaign. However, the Foundation's recent evaluation showed that a much greater investment is needed to broker and carry out land use plans nationwide as well as speed up protection campaigns in the face of development threats. Fortunately, there is potential to engage other funders. The Pew Charitable Trusts, which is leading the campaign, might be convinced to match any increase in Foundation funding. The Gordon and Betty Moore Foundation might be convinced to make a major commitment, too, if the Boreal campaign can be extended to the Pacific coast, a historical priority for both the Moore and Hewlett foundations.

3

CONTINUATION OF SEVERAL SUCCESSFUL CAMPAIGNS WILL COMPLETE THE PROGRAM'S PORTFOLIO

IN ADDITION TO THE THREE CAMPAIGNS DESCRIBED IN SECTION 2, THE PROGRAM WILL CONTINUE to invest in several others that will achieve important land, water, and energy goals. These campaigns also will lay the foundation for important future conservation gains. Combined, they account for around 15 percent of the Program's proposed budget.

3.1 Local land conservation work will complement West-wide land protection efforts and focus on increasing conservation funding and building capacity for conservation advocacy in highly threatened areas.

The Program's land conservation goal primarily relies on national policies in the United States and national and provincial policies in Canada to protect public land. While these policy campaigns can protect millions of acres of land, they do not obviate the need for complementary targeted work in threatened areas.

The Program's evaluation highlighted two such areas:

1. In southwestern deserts, which lack significant protected areas, the Program will seek to create long-term conservation opportunities by building conservation advocacy capacity and exploring innovative mechanisms for securing private land and river conservation, such as mitigation resulting from energy development in other regions.
2. On the private lands across the West that provide riparian habitat and connections between landscapes, but also are much more expensive targets for action the Program will fund efforts to increase public sources of conservation funding. This funding would allow grantees to work across public and private lands, adding them to the public estate where appropriate and supporting sustainable ranching practices.

Increasing conservation funding is especially important for conserving lands (typically privately owned) that form the connections with larger wildland areas—the majority of which are publicly owned. Priority strategies include:

- **Advancing conservation in southwestern deserts.** The Program will invest to create future opportunities in southwestern deserts, ecoregions the evaluation highlighted as among the highest-priority targets, partially because only about 10 percent of the land is strictly protected now. The evaluation, as well as subsequent expert interviews, also underscored the

need to work with Latino communities to build a base for conservation support. The Program's past work did not engage in the Southwest due to a shortage of promising opportunities. Under the refreshed plan, the Program will make small investments now to identify potential areas for engagement later and begin to build a base of support.

- **Increasing conservation funding via the Land and Water Conservation Fund (1.8 million acres).** The Program will continue to support a campaign to guarantee \$900 million a year for the federal Land and Water Conservation Fund, the largest single source of money to conserve private lands for conservation purposes. Advocates have continued to build gradual support and have prevented major funding cuts despite conservatives' skepticism and the strong bipartisan desire to decrease spending. Conservationists will be tested further in 2015 when the Fund must be reauthorized by Congress if it is to continue. Despite these headwinds, advocates have secured additional bipartisan votes for full funding. Small investments in this campaign may lead to major conservation victories on private lands that are a conservation priority.
- **Increasing conservation funding via mitigation mechanisms (approximately 1 million acres).** Establishing new sources of mitigation funding will channel resources to private land conservation from development of energy resources or other uses. For example, conservationists are investigating policies that would require funds from private developers (typically extractive industries like oil, gas, and coal) to be established by the secretary of the interior. Another effort is piloting use of the Endangered Species Act to broker deals whereby public land managers direct funds to offset the negative impacts of development activities by improving habitat elsewhere.
- **Increasing conservation funding via state and local initiatives (approximately 400,000 acres).** The Program will maintain small investments in state and local conservation funding, helping advocates educate voters on the value of conservation. Since state and local governments are a large source of private land easement and acquisition funding, relatively small philanthropic investments can produce major increases in their funding and how well it is spent. The Program has been successful in this area, and the evaluation found a high likelihood of future progress.

3.2 Water strategy will continue to prioritize river flows and riparian habitat protection.

The Program recognizes that healthy freshwater and wetland habitats are essential to the ecological integrity of the West. If the Program cannot meet its freshwater aims, it will not achieve its overall conservation goal. Progress has been made in the past five years, with nearly 3,500 river miles conserved and about half of them under strict protection as Wild and Scenic Rivers. However, as the evaluation noted, freshwater conservation tends to be dispersed across the West, and care is needed to ensure that incremental gains result in widespread improvements for the region.

The Program will maintain its freshwater investments as a critical part of the overall strategy to conserve half of the region's forty-eight targeted ecoregions. Funding will be focused on conserving 10,500 river miles through continued support for grantees that advance policies to increase river flows and protect riparian lands. Staff will monitor the water policy environment and raise funding levels if major new policy opportunities arise.

The Program also will work with grantees and the scientific community to identify tools and strategies that can focus work where most needed, avoiding a patchwork of gains. Priority strategies include:

- **Restoring crucial watersheds for coldwater fisheries.** The Program's investments in watershed restoration continue to pay dividends. Engaging anglers and sportsmen in reconnecting and restoring native fish habitat in coldwater fisheries has led to marked improvements in local conditions and built an important constituency for conservation. In the coming five years, these efforts will be concentrated in a few priority basins, focusing on approximately 4,500 river miles (colored areas in fig. 6).
- **Reforming hydropower.** The best opportunity to reform dam management is to participate in the federal process to relicense privately owned dams. The Foundation's engagement helped restore more than 1,000 river miles in the past five years, and taking part in the coming years' relicensing opportunities could improve conservation on nearly 5,000 river miles (orange lines in fig. 6). The idiosyncrasies of the decades-long relicensing cycles mean that fewer dams will come up for relicensing after this five-year strategy, suggesting that the Program plan for a phased exit from this work.
- **Increasing Wild and Scenic Rivers.** The closest equivalent to federal Wilderness protection that a U.S. river can obtain is a Wild and Scenic River designation. This legislative protection is typically the result of many years of local organizing efforts. The Program will support these local efforts in priority watersheds in preparation for such congressional opportunities (purple lines in fig. 6).
- **Exploring opportunities to improve water conservation in southwestern deserts and in state water management.** In addition to continuing proven strategies, the Program will explore two less-certain ones. The first will be seeking opportunities for freshwater conservation

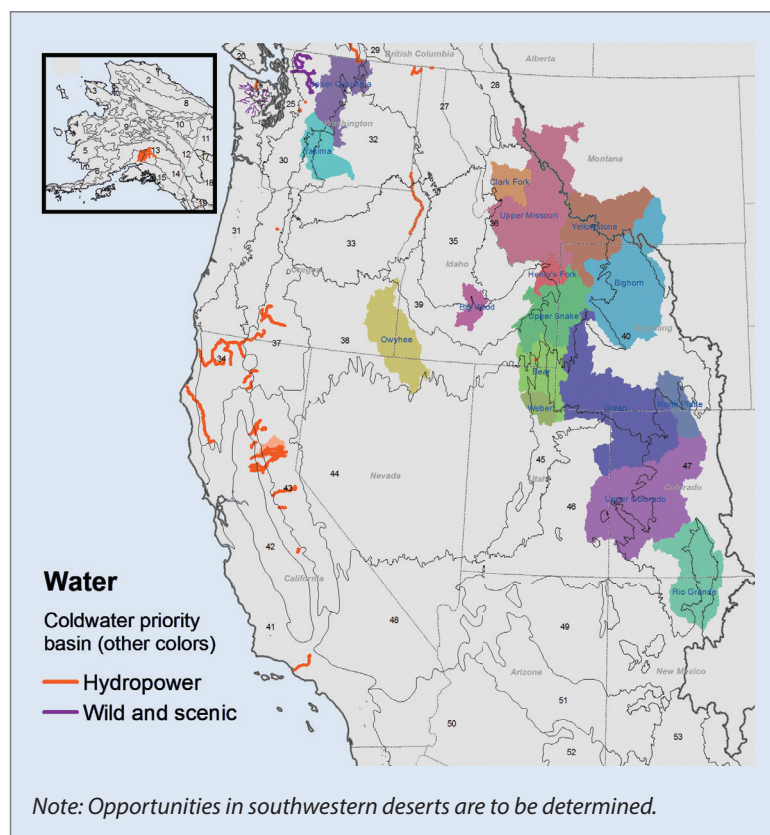


FIGURE 6 Priority areas for water work

in southwestern deserts in line with the evaluation's recommendations: freshwater work is particularly important in desert ecoregions, and the Southwest is underprotected. The second will be supporting policy work to improve water management at the state level. Doing so is difficult, but the lack of federal oversight means that only state-by-state efforts can improve the underlying frameworks of water management in the West.

4

THE PRIORITY WESTERN STRATEGIES WILL BE STRENGTHENED BY NEW SUPPORT FOR SOPHISTICATED ADVOCACY

THE HIGH-PROFILE FAILURE OF CLIMATE CHANGE LEGISLATION IN 2010 LAID BARE THE environmental movement's inability to secure major policies in the face of well-funded opponents and a dysfunctional Congress. The days of the 374–1 House vote for the Clean Air Act in 1970 are long gone. Only sophisticated advocacy that channels broad grassroots support into politically savvy campaigns will succeed now. As the Program's evaluation concluded, "While the conservation community has built considerable advocacy strength, it is not sufficient to make adequate progress in the next five years in the face of considerable political and economic obstacles." The Program's capacity scan reached a similar conclusion, as did evaluations of related programs at the Wyss Foundation.

The Hewlett Foundation already is ahead of its peers in expanding the conservation movement's capacity for advocacy. With targeted support, the Program's grantees have led campaigns in conservation, energy, and climate. However, lessons from the past few years suggest that the Program must now take the next step: bringing together policy experts and established organizations to speak with one voice in targeted campaigns and strengthening coordination among different campaigns.⁵

4.1 The Program will bolster established conservation organizations.

Established conservation groups excel where broad community support is needed for conservation victories, such as campaigns to designate land for federal protection. These campaigns build on a strong foundation of grassroots support, which then allows county commissioners and other local politicians to feel politically secure in supporting conservation aims. The support of local politicians then translates into congressional support for these essentially local conservation victories.

Grassroots campaigns are necessary as well for success in large-scale policy changes across the West. As an example, conservationists helped sportsmen make their voices heard in the successful drive to protect the 1.2 million-acre Wyoming Range. Now, the same voices are being heard in broader debates about the proper use of public lands. Two evaluations of the failure to enact climate change legislation in 2010 dramatically illustrated the need for deep

⁵ As these activities support the Program's land, water, and energy goals, their budgets are integrated into the relevant campaigns.

grassroots support. They noted that high-level policy support dissolved when there was no sustained pressure from influential grassroots organizations.⁶

The Program will bolster established conservation organizations by:

- **Providing focused support for organizational effectiveness.** Support for developing organizational effectiveness is most beneficial when limited to a few key priorities. The Hewlett Foundation has numerous ways of doing this, including a unique fund specifically for outcome-oriented capacity building.
- **Championing outreach efforts to constituencies that influence policy.** The Program's evaluation highlighted the need for advocates to organize communities that are most likely to influence policy. The aim is to disprove the view among some in Washington that conservationists are overwhelmingly old, white, and allied with only one political party. Past efforts to mobilize sportsmen have been successful and will continue. The Program also will support organizations working with groups that policy insiders recognize as important constituencies, including Latinos, young people, women, outdoor industry leaders, and urban and suburban families.
- **Supporting organizations striving for greater policy acumen.** A few established organizations are seeking to adopt some of the innovative techniques of next-generation groups to develop their own policy skills, and the Program will support their efforts.
- **Developing internal communications capacity.** Established organizations often struggle to deliver compelling messages. While it is unrealistic to expect coordinated communications strategies between established organizations, many can improve their capacities. The Foundation also has provided customized training and consultants for groups of grantees working on similar campaigns.

4.2 Expanding the capacity of next-generation organizations and promoting experimentation will give campaigns needed savvy.

The Program, along with the Wyss Foundation, pioneered the development of next-generation organizations that take the skills of the country's most effective advocacy campaigns and apply them to conservation. These new organizations have demonstrated the power of sophisticated policy advocacy both by catalyzing policy wins and by providing tactical support to established groups. The Program has helped build four next-generation groups:

⁶ See Theda Skocpol, "Naming the Problem: What It Will Take to Counter Extremism and Engage Americans in the Fight against Global Warming," Scholars Strategy Network, 2013 [http://www.scholarsstrategynetwork.org/sites/default/files/skocpol_captrade_report_january_2013_0.pdf]; Nicholas Lemann, "When the Earth Moved: What Happened to the Environmental Movement?" *The New Yorker* (April 15, 2013) [http://www.newyorker.com/arts/critics/atlarge/2013/04/15/130415crat_atlarge_lemann?currentPage=all].

- **Western Conservation Foundation (WCF)** reaches decision makers with well-crafted messages delivered by voices that engage key audiences. WCF is the most experienced and institutionalized of the next-generation organizations.
- **Center for American Progress’s Public Lands Project (CAP)** integrates public lands issues into CAP’s think tank and advocacy work, supporting federal actions for conservation.
- **Western Energy Project (WEP)** combines policy expertise, communications savvy, and outreach to policymakers to protect public lands threatened by oil, gas, and oil shale development.
- **Center for Western Priorities (CWP)** delivers timely messages on conservation and energy policy throughout the West using traditional and new media. CWP is the newest and most experimental of the next-generation organizations.

These groups have succeeded by developing unified messages, seeking out wider coalitions and more diverse messengers, and providing policymakers with reasons to act. They have helped the conservation movement secure strong anti-oil shale leasing regulations, new National Monuments, and increased funding for the Land and Water Conservation Fund.

In addition to the current crop of next-generation organizations, the Program may determine that other groups would be helpful. Although starting new organizations can be both risky and costly, the Program’s success in investing in this first batch of new advocacy champions suggests that a few more investments may make sense.

One such area where new capacity is needed is outreach to conservative policymakers. While conservation enjoyed bipartisan support for decades, increased polarization in Congress has created the appearance that conservation is solely a liberal issue. If this perception continues, it will be difficult to achieve policy gains against a lockstep opposition. Although the Program cannot restructure the modern partisan landscape, it can begin to reach sympathetic conservatives. The next-generation groups already have encouraged conservative champions by communicating the economic benefits of conservation, but more structured efforts likely will require a new group with genuine conservative roots.

4.3 Increased coordinating capacity is needed within and across priority strategies.

To succeed in the major policy areas described in this plan, the conservation movement now needs to combine the strengths of its next-generation and established groups. Coordinating capacity will bring the two types of expertise described above under a single umbrella, assembling the resources a campaign needs to succeed.

Early evidence indicates that tight coordination of the two different types of advocacy skills increases the effectiveness of both. One grantee is testing a fully integrated model by merging with a more explicitly political organization, and the initial results are positive. The new organization helped secure new policies that supported renewable energy, removed barriers to electric vehicles, and prevented harmful fossil fuel industry bills from passing. These victories came when policymakers knew they could rely on the grantee to express support to important constituencies in their areas.

The Program has also identified a need for greater coordinating capacity across each of its priority strategies and plans to devote more staff time as well as resources to this work. Increased cross-campaign coordination is particularly important because the major U.S. federal policy opportunities in the energy development and land conservation campaigns will rely on many of the same administration and congressional leaders. This overlap creates a risk of confusing policymakers with multiple requests from different parts of the conservation movement. Such fragmentation weakens the cause of conservationists and makes it less likely for any requests to succeed.

4.4 Campaign plans will provide pragmatic and flexible guidelines.

Advancing major policy changes like those in this plan is inherently chaotic: windows of opportunity open and close with little notice, and successful tactics do not necessarily transfer from one campaign to the next. Strategies are more likely to succeed when they are backed with a sound theory of change and a related plan that recognizes several alternative paths to success. Having a clear plan with measurable outcomes allows advocates to monitor and evaluate their progress, flexibly adjusting their strategy and tactics while maintaining a focus on their overall goal.

The Program will work with grantees to develop high-level plans to guide efforts in priority campaigns and will ensure funds are deployed to strategies most likely to deliver identified policy priorities. These blueprints will be used to guide conversations with grantees, setting forth the Program's expectations about the ingredients for a plan's success without being prescriptive about the methods and tactics needed to execute it.

5

THE PROGRAM'S IMPACT WILL DEPEND ON ITS BUDGET LEVEL

THE PROGRAM'S IMPACT OVER THE NEXT FIVE YEARS IS UNLIKELY TO BE CONSTRAINED BY A LACK OF opportunities. The final years of the Obama administration provide a unique opportunity to push for long-lasting conservation victories, and the Program's evaluation identified promising opportunities well beyond what is currently funded. Nor will the Program's impact be constrained by the field's ability to absorb funding. Years of recession-induced spending cuts and a gradual exit by several major funders have left many grantee organizations spread thin. Rather, the Program's impact will be constrained by its budget level.

The Western Conservation strategy currently grants approximately \$16 million each year, down almost 30 percent from the \$22 million level envisioned at the start of the previous strategy in 2008. At current levels, the three proposed priority strategies will take up 60 percent of the Program's budget, leaving only modest room to invest at scale across each of the identified land, water, and energy strategies. This refreshed strategy therefore proposes an increased budget of \$21–\$23 million.

This proposed budget will strengthen investments in the large-scale campaigns most likely to result in major, lasting conservation victories. The energy development campaign will include greater support for sophisticated policy advocacy and an expanded geographic reach. The conservation lands campaign will engage in more areas and on more targets. The Boreal Forest Conservation Initiative will be funded at the level recommended by the external evaluation. Fuller engagement in southwestern deserts, as recommended by the Program's evaluation, is also possible at this budget level.

6

THE PROGRAM WILL RELY ON AN EFFECTIVE MONITORING AND EVALUATION APPROACH

TRACKING AND EVALUATING PROGRESS ARE CRUCIAL FOR ADAPTING THE STRATEGY AS CONDITIONS change and planned activities succeed and fail. Over the coming months, the Program will build out its monitoring and evaluation plan with the assistance of the Foundation's Effective Philanthropy Group. It expects that the plan will evolve with the Board's input on Foundation-wide planning as well.

6.1 Monitoring will support grantees' use of easy-to-deliver, easy-to-collect metrics.

The Program is developing its monitoring plan so it can use data collection to refine assumptions and answer useful evaluation questions. Considering how and when the Program will track the outcomes of grantee activities as part of this refreshed strategy will allow staff to collect useful baseline and longitudinal data, establish convenient reporting formats, and communicate expectations to grantees.

Conservation is complex, and the Program could usefully monitor many aspects of its priority strategies. Polling could highlight the effectiveness of constituency building; species-specific indicators could suggest where habitats are becoming more resilient. However, while monitoring eases program management and evaluation, it also carries a cost for both grantees and the Program. The Foundation therefore seeks to monitor only the easiest-to-collect information needed to inform its grantmaking and test its success.

Therefore, for most of its grantees' work, the Program will primarily track three simple characteristics: the size of the area conserved (expressed in either acres or river miles); the location of that conservation (in particular whether it is in one of the forty-eight target ecoregions); and whether a given conservation success moves an area into the "complete protection" category, indicating that additional conservation gains are no longer needed and that focus can shift to defending previous gains.

The Program will also track progress toward its goal of permitting 10 GW of renewable energy on public lands, promoting a transition from fossil fuels to clean energy. This monitoring will allow the Program to quickly assemble detailed charts showing how it is progressing in its West-wide goals and in particular target ecoregions.

Most grantees are prepared to report this information, in part because the Program has developed an easy-to-use online tool to collect it. The Program

has invested in its grantees' use of this online tracking tool and will work with them to improve their facility with it where needed. Staff takes this data and regularly analyzes it with respect to the Program's ecological integrity goals, much as was done for the Program-wide evaluation.

At the same time, the Program will not lose sight of its important work to build deep and broad support for conservation. While this progress is more difficult to track, it is no less important to achieving western conservation gains. The Program will ask its grantees to provide short descriptions of support-building successes, failures, and challenges. This qualitative data will help illuminate where funding strategies have been effective and where adjustments are needed.

6.2 Evaluation will assess the main assumptions behind each major campaign.

The Program will develop its evaluation plan to maximize what it can learn from its experiences and improve its grantmaking. The plan will incorporate input from the Effective Philanthropy Group and the Board. Since staff time and Foundation resources for evaluations are limited, the Program will prioritize those that will have the greatest impact on its major decisions.

The presumptive evaluation priorities are the three major campaigns to be funded in the coming years: energy development, conservation lands through BLM planning, and the special Boreal Forest conservation initiative. In addition, the Program will evaluate the funding area of greatest innovation, and therefore the greatest potential for learning: development of sophisticated advocacy capacity.

The Program chose these top priorities based on a set of factors, including:

- **Opportunity to change the Program.** Will the evaluation results change the Program's grantmaking? In most cases, this factor most strongly determines an evaluation's importance, especially if the Program is facing a key decision, such as a major grant renewal.
- **Opportunity to change the field.** Will the evaluation results change the broader field? Sometimes evaluations serve to shape policy and practice of a field by bringing new information to a broad audience.
- **Importance to the goal.** How important is the investment to the Program's overall goal, and how large is the investment? If an investment is central to the overall success of a strategy, it is more important to evaluate it. The size of the investment can often serve as a proxy for its importance.
- **Uncertainty of the theory of change.** How risky is the strategy underlying the investment? Newer, less-tested investments are more important to evaluate than long-standing ones whose strong theories of change have proven successful.

For these top priorities, the Program has identified decision points that will govern when evaluations should take place (see Appendix, fig. 1) and drafted specific questions to guide them. These questions, based on the main assumptions behind each priority strategy, are in the Evaluation section of the appendices to this strategic plan and will be refined with the assistance of the Effective Philanthropy Group.

* * *

Western conservation is a pillar of the Hewlett Foundation's commitment to solving social and environmental problems. The Program's success over the past five years provides great reason for optimism, and with this updated strategy, the Program is poised to capitalize on the opportunities emerging over the coming years.