



The
BALBOA PARK
Conservancy

*Keeping Balboa Park
Magnificent*

COLLABORATIVE CONVERSATIONS SUMMARY REPORT

July 27, 2013

EXECUTIVE SUMMARY

The Collaborative Conversations held with 74 Park stakeholders in the second quarter of 2013 affirmed the Balboa Park Conservancy's stated mission: *To serve as a steward of Balboa Park by preserving and enhancing its natural beauty, historic character and community orientation for the benefit of future generations.* The commitment to promote the overall good of the entire Park was, in fact, perceived, as unique to the Conservancy, along with its dedication to building a stronger Parkwide community.

Stakeholders gave valuable and specific advice regarding the Conservancy's criteria for prioritizing projects, the opportunities for impact and collaboration and the ongoing development of the Conservancy and the Park community as a whole.

Three key themes emerged:

- The Conservancy must articulate an inspiring vision that draws attention, excitement and, especially, financial support
- The Conservancy must take on activities that are feasible and achievable in the short term in order to demonstrate its ability to succeed

- The Conservancy must prove itself as the “owner” of what’s good for the entire Park by operating with transparency and by building trust, collaboration and community.

These three themes are mirrored in the top three Project Criteria selected by the Conservancy’s Board:

- Serve the long-term, overall good of the Park, consistent with the Conservancy’s Vision
- Support the Conservancy’s short/mid-term strategic needs
- Involved multiple stakeholders in collaborative efforts resulting in Parkwide beneficiaries as well as leverage the work of others.

The outcomes of the Collaborative Conversations have been very gratifying and useful in sharpening the Conservancy’s focus and increasing its resolve. We express our deep appreciation to everyone who contributed their time, insight and vision to this worthwhile and motivating effort.

BACKGROUND AND PROCESS

The Balboa Park Conservancy is a public benefit, nonprofit entity established in 2011 with the mission:

To serve as a steward of Balboa Park by preserving and enhancing its natural beauty, historic character and community orientation for the benefit of future generations.

In addition to the many organizations dedicated to specific features, activities and/or constituencies within the Park, the Conservancy is uniquely positioned to promote the overall good of the entire Park—built and natural, East and West, above ground and below ground—and maintain the Park’s orientation as a center of community.

The Conservancy was formed as the result of a multi-year process initiated by several Park-focused foundations—notably, the Legler Benbough Foundation, the Parker Foundation and the San Diego Foundation—, the Balboa Park Committee (the all-volunteer citizen advisory group), Mayor Jerry Sanders and Council Members for the Third District Toni Atkins and Todd Gloria sequentially. To inform this process, two significant studies were completed by the Trust for Public Lands; the first reviewed best governance and management practices for large urban parks in the United States and the second focused specifically on the conditions in Balboa Park, including information on Park usage, examples of capital and maintenance needs and management and funding options. Nearly three hundred million dollars in deferred maintenance projects were identified, not including the costs to address longstanding deficits in transportation, parking and circulation.

Recognizing that the City would not be able to provide the necessary financial support for Balboa Park’s current, let alone, future needs, the Balboa Park Committee recommended to the City of San Diego that a “Balboa Park Task Force” be formed to further analyze the potential for a public-private partnership to address governance,

fundraising and management of Balboa Park. The Task Force's deliberations ultimately resulted in the creation of the Balboa Park Conservancy to respond to the needs and hopes expressed by Park stakeholders, Park staff, donors and the general public.

Before embarking on this ambitious mission, the Conservancy first had to establish itself as a nonprofit entity with the capacity to raise funds and to inspire the confidence of major donors. Completing the formal establishment of the Conservancy took over a year. Fortunately, the Conservancy now has the infrastructure and core professional and volunteer staff in place to actively pursue its fundraising and strategic goals.

From the outset, the Conservancy recognized that it could only fulfill its mission by working in collaboration with the entire Park community and by being transparent and inclusive regarding its priorities and aspirations for the Park. As a relatively unknown organization, it was also essential for the Conservancy to build a common understanding and framework for how it would best serve the Park, informed by its many stakeholders.

In order to foster this mutual understanding and, thereby, inspire trust across the Park and surrounding communities, the Conservancy resolved to hold a series of professionally facilitated "Collaborative Conversations." In March 2013, Lester Olmstead-Rose, a Partner with LaPiana Consulting, a national management consulting firm dedicated to strengthening nonprofits and foundations, was engaged to design and lead the "Collaborative Conversation" workshops.

The "Collaborative Conversations" process launched with a well-attended workshop for the Conservancy Board, then took flight in nine small group conversations held during the month of May 2013. Over 120 people representing a wide variety of organizations and functions within or near the Park received invitations. Over 50% of those invited, a total of 62 individuals, attended these two-hour workshops, representing 39 different organizations: cultural institutions, philanthropic organizations, sports and trade associations, City government and citizens groups. These workshops were

supplemented with over a dozen one-on-one conversations with nine additional entities, including Council offices (Appendix A – Collaborative Conversation Attendees).

As reflected on the Meeting Agenda (Appendix B – Collaborative Conversation Meetings – Agenda), the Objectives of the meetings were to:

- Learn about the intersection of Park stakeholder priorities and Balboa Park Conservancy’s mission and thereby identify where there is potential to work together to a more effective outcome
- Build the Park community.

Attendees were encouraged to provide the Conservancy with recommended criteria for making decisions on project selection and priority, to identify specific projects and functions for the Conservancy and to advise on how to make all this work. An average of three Conservancy Board members was at each meeting to receive the observations, suggestions and counsel firsthand. Summarized on the following pages, the thoughtful and candid feedback received was both enlightening and energizing.

PROJECT CRITERIA

The first step in applying what was learned from the Collaborative Conversations is to define how the Conservancy will make decisions about its work. To accomplish this, the Conservancy created a draft list of criteria— or a strategy screen (Appendix C)—to be considered when prioritizing the projects it will take on.

Establishing explicit criteria as part of a decision-making process is essential for reinforcing shared understanding and agreement and for communicating consistently with stakeholders. However, it’s important to keep in mind that these criteria are still just guidelines, not absolutes; there is no formula to guarantee a perfectly correct decision. In other words, there is no substitute for human judgment.

As a relatively new organization, the Conservancy will seek to apply these criteria over the short-term of one to three years. Furthermore, as the Board implements and

adjusts its work plans over the next three years, the Board will continue to review and, as necessary, refine these criteria at least annually.

The Board has particularly identified three of these criteria as being most critical and influential in the decision-making process. These three are described below as “Priority Criteria.” Note: Each criterion below incorporates some of the relevant discussion from the Collaborative Conversations.

PRIORITY CRITERIA

Criterion One: Serve the Long-term, Overall Good of the Park

The Conservancy was created to play a role in the Park that no other entity has yet fulfilled. While it is fortunate that there are so many existing organizations doing good work in and for the Park, they typically do not encompass the entirety of the Park in their missions. The Conservancy not only serves the long-term good of the entire Park— built and natural, East and West, above ground and below ground—, but also seeks to bring together public and private resources to do so.

Many stakeholders—perhaps even most-- voiced support for the Conservancy prioritizing projects that benefit the common good over those that would disproportionately benefit a small group of Park users or Park institutions. Thus, to meet this criterion, the positive outcomes from the Conservancy’s support must be well defined in advance and have broad and lasting impact.

Furthermore, “overall” is interpreted as referring not just to geography (e.g.: Central Mesa, East Park, adjoining communities) but to uses (e.g.: built areas, natural areas, recreation) and, most importantly, users. Park users are clearly not one uniform group but are a wide range of local residents, regional residents, out-of-town visitors, day-to-day users (e.g.: recreational participants, joggers, etc.), institutional visitors, volunteers,

employees and event attendees. Thus, the Conservancy has a special responsibility and role in identifying and serving diverse geographic, functions and user needs.

Criterion Two: Support the Conservancy's Short- and Mid-term Strategic Goals

The Conservancy is still in its early stage of development and must demonstrate its relevance and effectiveness in order to fulfill its potential as a vibrant and vital contributor to the overall Park. Its immediate strategic goals are contained in its Purpose statement:

- To fund, implement and manage projects for the good of Balboa Park
- To support projects that restore, preserve, maintain and improve Balboa Park's parklands, building and infrastructure.
- To advocate for and on behalf of Balboa Park for the benefit of current visitors and future generations.

In the Collaborative Conversations, Park stakeholders expressed an extremely high level of skepticism that anyone would be capable of consistently achieving the above goals. Nearly everyone came with a story of a worthy project that died on the vine or was nearly impossible to move forward due to systemic and resource constraints. Many raised doubts that any organization could build shared agreement and ownership around critical projects—especially in the wake of the Plaza de Panama experience which has been deeply polarizing. To break these patterns of defeat, the Conservancy was strongly advised to select work that:

- Demonstrates success in the short term
- Builds the organization's capacity for future initiatives
- Positions the Conservancy as the leader in forward-looking thinking around the Park's future.

In this way, the Conservancy would also “build its brand” and become more visible and recognized for its added value.

Creating a track record of success in the near term is a mission-critical issue. The Conservancy must build its capacity and credibility if it is to have any hope of fulfilling its Mission.

Criterion Three: Involve Multiple Stakeholders

Given the hundreds of Park needs and thousands of Park stakeholders, there is no need or justification for the Conservancy to pursue projects by itself. It is much smarter and faster to leverage the evident intersections between the project goals of existing organizations and the project goals of the Conservancy. Through alignment of actions and advocacy, multiple stakeholders can build on each other's strengths, accelerate progress and effect projects that benefit Parkwide beneficiaries. Thus, this criterion not only advances project success, but demonstrates the Conservancy's deep commitment to meaningful collaboration and the common good.

ADDITIONAL CRITERIA

Criterion Four: Demonstrate Evidence of Feasibility

Park stakeholders expressed major concern about the Conservancy's ability to carry projects through to completion. Given the challenging environment to date, the Conservancy's potential collaborators as well as Park funders must be convinced that the Conservancy will be able to forge a path to success. Consequently, the Conservancy must prioritize first projects that are clearly feasible.

Feasibility may be evidenced by many means, including those below (which draw upon some points covered as separate criteria)

- Demonstrating alignment with previously approved Park plans
- Securing active support from public officials, both elected and appointed leadership

- Identifying likely funding sources (see below)
- Identifying and differentiating the Conservancy's institutional skill and capacity—as well as a realistic process and timeframe—to carry the effort to completion
- Generating support from a wide array of Park stakeholders.

Criterion Five: Address an Essential Park Need

The Conservancy was created to take on the huge unmet needs of the Park. As such the Conservancy will prioritize projects that meet critical needs. Such need is loosely defined as work that will:

- Result in great future expense or catastrophic consequences if not addressed soon
- Is unlikely to be addressed by others
- Is necessary but perhaps less visible or unglamorous

Although this criterion was suggested by many stakeholders and accepted as an appropriate criterion by the Board, a significant number of stakeholders offered a valuable “minority” opinion. Some thought that, in the short run, the Conservancy would be more successful prioritizing “wins” that were highly visible in order to establish a positive reputation and attract attention and funding for future efforts. Yet another variation proposed was to pursue highly visible and appealing projects but require funders of those projects to allocate a percentage of their donation to support infrastructure and other essential needs.

Criterion Six: Tell a Story That Will Attract Funding

The primary way that the Conservancy will prove itself is by bringing private and outside funding to Park projects. In order to secure funds, the Conservancy must first educate the funder community about Park needs and generate enthusiasm through these efforts.

Whether addressing enhancements or urgent needs, projects must have a strong rationale and compelling narrative that will be convincing to funders. Even the less glamorous, basic infrastructure projects can be motivating to the right donor, although some stakeholders believed it would be very difficult to attract funds for these purposes. Consequently, this criterion requires the Conservancy to anticipate not just the merits of each project, but, also how and to whom it will be presented for best advantage. Those projects with the greatest potential to inspire funders will receive higher priority.

Criterion Seven: Require Skills or Capacity Other Organizations Cannot Provide

In the near term, the Conservancy seeks to fill the gap in the Park community's ability to move Park projects forward and to develop and establish capacity where none exists now. This criterion complements Criterion Three – Involve Multiple Stakeholders—by emphasizing that the Conservancy must demonstrate unique skills and added value in its relationships and partnerships with other Park entities. By understanding and respecting the skills and capacities of other stakeholders, the Conservancy should neither infringe upon nor compete with other entities, but, instead, provide incremental resources and support.

Criterion Eight: Include a Measureable Definition of Success

The Conservancy will only move forward on a project where success can be clearly defined and a path to achievement described. Furthermore, this definition and path should be widely understood by and be acceptable to a large proportion of Park stakeholders.

ROLE OF THE CONSERVANCY

Stakeholders described critical areas of work for the Conservancy and the corresponding roles:

- Bring resources to Park projects
 - Financial assistance
 - Expertise, external and internal to the Park
 - Other (e.g.: volunteers, research, etc.)
- Establish processes and systems to track and support both private and public Park projects, serving as a clearinghouse and facilitator/expediter in working with the City
- Advocate on behalf of the overall Park needs and desired improvements (although several stakeholders did not support an active role in this area)
- Educate potential donors and funders about the wide spectrum of Park needs, both high profile and mundane.

HOW THE CONSERVANCY MUST OPERATE

Stakeholders consistently wanted these guiding principles to be embodied by the Conservancy:

- Transparency, through ongoing, open communication
- Collaboration that builds community—but knowing that 100% alignment will never be possible
- Vision/Future/Big Picture that inspires and unites the Park community
- Focus on Outcomes, paying close attention to the specific, more detailed steps that build to the Vision and achieving visible and timely results.

Collaborative Conversation participants expressed uniform appreciation that the Conservancy convened these meetings to seek community input. They recommended that the Conservancy continue to operate in this accessible and collaborative fashion.

Additional details and insights from all of the workshops is contained in Appendix D.

NEXT STEPS

Over the remainder of this 2013-2014 fiscal year, the Conservancy plans to:

- Publish the draft Project Criteria and seek additional input
- Continue to meet with key civic and Park leaders
- Collaborate with partners to identify high potential projects
- Evaluate potential projects against the Project Criteria
- Create a menu of priority projects for discussion with potential funders
- Develop and implement a comprehensive communications plan outlining the topics, vehicles and objectives for ongoing dialogue and meetings with the Park community
- Proceed with merger plans with Balboa Park Central
- Develop a multi-year staffing plan for both professional and volunteer positions.

APPENDIX A: Collaborative Conversation Workshop Attendees

Workshops

131 invitees (including those who had one-on-one meetings)

53 attendees in Round 1 (May 6, 7 and 8)

9 attendees in Round 2 (May 29 and 30)

Total attendees: 62

39 organizations represented

One-on-One Conversations

12 one-on-one conversations

9 additional entities/organizations (including Council offices)

TOTALS

131 invitees

74 individuals connected with (56%)

48 organizations reached

APPENDIX B: Collaborative Conversation Meetings Agenda

Balboa Park Conservancy *Collaborative Conversation Meetings - Agenda* May 2013, Requa Room, House of Hospitality

Mission

To serve as a steward of Balboa Park by preserving and enhancing its natural beauty, historic character and community orientation for the benefit of future generations.

Meeting Objective

- Learn about the intersection of Park stakeholder priorities and Balboa Park Conservancy's mission – identify where there is potential to work together in order to be more effective together
- Build the Park community

Topic

-
- Introductions
 - Agenda review
-
- Conservancy's decision making criteria
-
- Park opportunities
 - Advice to the Conservancy around these opportunities
-
- Development of the Conservancy
-
- Close
-

Contact Information

Connie Matsui, Balboa Park Conservancy Board Member – connie.matsui@gmail.com

Andrea Caldwell, Balboa Park Conservancy Executive Assistant –
acaldwell@balboaparkconservancy.org

Lester Olmstead-Rose, La Piana Consulting – olmstead-rose@lapiana.org

APPENDIX C: Summary Strategy Screen

Does this choice...	
Priority Criteria	
√	... serve the long-term, overall good of the Park, consistent with BPC's vision
√	... support BPC's short/mid-term strategic needs: <ul style="list-style-type: none"> ▪ Provide a success in the short term? ▪ Build BPC's capacity for future initiatives? ▪ Position BPC as the leader in forward-looking thinking around the Park's future?
√	... involve multiple stakeholders in collaborative efforts resulting in park-wide beneficiaries? ... leverage the efforts of others?
Additional Criteria	
√	... demonstrate evidence of feasibility by: <ul style="list-style-type: none"> ▪ Working with approved Park plans or identifying achievable Park plan changes? ▪ Securing support of key City leaders ▪ Completing the initiative within a specified time frame? ▪ Articulating the process by which success will be achieved?
√	... address an essential Park need? (e.g., address something that will have negative consequences if ignored, or rises above "nice idea" to "critical need")
√	... tell a story that will attract funding?
√	... require skills or capacity that other organizations can't provide?
√	... involve multiple stakeholders in collaborative efforts resulting in park-wide beneficiaries? ... leverage the efforts of others?
√	... include a measurable definition of success?

APPENDIX D: Summary of Collaborative Conversations Input

This is a compilation of feedback received from Park stakeholders during the Collaborative Conversations meetings. It is not intended to be an exhaustive nor word-for-word transcription, but rather a reflection of the range-- not necessarily, the volume-- of input received. The summary report itself already captures the most prevalent views expressed; this section provides more of the color.

The input is organized in three categories: 1) criteria for making decisions on project selection and priority, 2) specific projects, initiatives and functions for the Conservancy and 3) advice on how to make all this work.

CRITERIA FOR PROJECT PRIORITIZATION

Serving the overall good of the Park was interpreted in different ways: for instance, responding to the needs and input of Park stakeholders and, especially, Park visitors and users; preserving and safeguarding the Park experience for future generations; attending to open space and every corner and border of the Park (not just the Central Mesa); focusing on improving both the visible and hidden aspects of the Park. Thus, the tangible features, routine functions and intangible benefits of the Park are all viewed as fitting within the Conservancy's scope of stewardship.

Assuring the availability of ongoing funds is obviously core to fulfilling this all-encompassing responsibility. Choosing projects that are not only visionary and exciting as well as feasible and achievable within a realistic timeframe is therefore vital to attracting funders.

At the same time, stakeholders emphasized that balance be maintained between urgent and long-term projects, between small and large projects and between high profile and maintenance activities. In other words, the Conservancy is expected to address deteriorating utility systems and public safety and security concerns either as a

component of or in parallel with the more glamorous, aesthetically thrilling projects-- and be inclusive, clear, fair and transparent in its assessment of priority.

To establish the Conservancy's track record and credibility, efficiency and effectiveness in approving and completing projects are paramount to success in the near term. Projected impact on the Park's beneficiaries was another key criterion. Nevertheless, more of a portfolio approach was desired over time-- so that progress could be made on multiple fronts as both the Conservancy's scope and capacity grew.

Sustainability and enduring legacy were also highly valued criteria, especially when imagining the 10-year-old appreciating the Park today returning with his or her grandchildren to relive those lasting memories. Thus, projects must anticipate and provide for future costs of operation through sustainable design, dedicated funding, endowment, earned income or other provisions.

Finally, it is essential that the Conservancy work collectively and collaboratively with Park stakeholders in order to **increase or augment**, not replace or cannibalize funding from the City and from current donors to Park-based organizations. The Conservancy's proposed and completed projects should serve to educate the general public about Park needs, promote access, enjoyment and recognition and, thereby, stimulate engagement and generosity from regional, national and international sources.

SPECIFIC PROJECTS, INITIATIVES AND FUNCTIONS

In every workshop, transportation within and outside the Park was consistently identified as a necessity for the overall good of the Park. Very closely related and nearly as frequently cited were deficiencies in parking, access for all (e.g.: entry points, ADA, bicycle, strollers, wheelchairs, etc.) and signage/wayfinding-- all of which were perceived as major obstacles to the optimal visitor experience.

Other environmental and structural requirements-- water conservation, historic restoration and preservation, cleanliness and safety of public facilities, beauty and sustainability of landscaping, seating, lighting and the many deferred maintenance items—were also highlighted, as were preserving natural resources (e.g.: open space, trees), creating better, more productive uses of underutilized spaces (e.g.: Inspiration Point, landfill, East Side) and increasing visibility and functionality for underappreciated areas of the Park (e.g.: Florida Canyon, Morley Field). There was also call for a more expansive and cohesive Visitor Experience and Visitor Center strategy in at least two of the workshops.

Stakeholders felt that the Conservancy should not only work to improve the physical Park, but also should invest in strengthening relationships with funders and partners such as the City, schools, planning groups and surrounding communities in order to elevate awareness and advocate on behalf of the entire Park (although some pointed out the downsides if advocacy is too narrowly focused or strident).

There was also demand for accurate inventory and analysis, reliable procedures and processes and access to centralized records and knowledge related to Park-based projects, since the current “rules of engagement” are not always clear or documented. This implied a role for the Conservancy as an information and/or resource hub on behalf of all Park projects, not just the ones sponsored by the Conservancy. However, stakeholders wanted the Conservancy to be proactive in identifying potential projects as well as in expediting known projects.

Comprehensive planning, coordination and facilitation across organizations and effective Park governance were similarly desired from the Conservancy. It was seen as especially important to be when guided by a comprehensive, unifying and inspiring vision for the Park’s future articulated by the Conservancy.

The opportunities for better communication and stronger connection are huge within the Park. In that regard, the Conservancy was seen as an appropriate convenor of all Park

stakeholders for not only strategic and operational purposes related to projects, but for Parkwide recognition and celebration, too.

Finally, the fiscal responsibilities of the Conservancy were described in various ways: attracting and securing funders for projects and infrastructure improvement, certainly, but, in addition, building endowments, establishing rules for revenue capture, brokering agreements with the City, seeking public financing for capital projects and even serving as fiscal agent for the smaller entities in the Park that do not have 501(c)3 designation from the IRS.

GENERAL ADVICE

The advice received from stakeholders was candid and caring. Universally, stakeholders wanted to see the Conservancy secure major funding and bring a worthy project over the finish line as soon as practical, in order to achieve success and prove its capacity to fulfill its mission. The Conservancy therefore needs to be expert and efficient in fundraising, marketing, and project management.

Some of the advice focused on precisely defining and strengthening relationships with the City government, County government and civic leaders and to cultivate even more partners and organizations beyond the current mix. Perceived as the public face of the Park, the Conservancy was also cautioned to be balanced and careful in taking public positions, to be transparent and skillful in supporting those positions and to anticipate disagreement, controversy and pushback despite best intentions. Stakeholders wanted the Conservancy to pursue win-win situations with City leaders, to gain their commitment to shared success and to earn the reputation for being solutions-oriented, innovative, knowledgeable about the entire Park and mission-driven.

In addition, the Conservancy was warned not to get distracted by trying to take on too much at once, to become unfocused or to be unduly influenced by opinionated donors. Clarity of expectations was seen as an absolute requirement with respect to roles,

inspiring vision, long-term plans and goals, definitions of success and understanding of potential pitfalls.

The Conservancy was encouraged to be inclusive and welcoming to all viewpoints, to be both thick-skinned and big-hearted and to use all appropriate means to build connectivity and maintain meaningful dialogue. Once again, communication and collaboration were consistent themes.