

A banner image showing a wide view of Clear Lake under a blue sky with scattered white clouds. In the foreground, several people are seen from behind, looking out at the water. The text 'Clear Lake Environmental Research Center' is overlaid in a white, outlined font across the top of the image.

Clear Lake Environmental Research Center

Strategic Planning Session - July 12, 2014

SUMMARY:

The Clear Lake Environmental Research Center (CLERC) held a Strategic Planning Session on July 12, 2014 for the purpose of brainstorming ideas and goals to determine the best path forward. The planning session was well-attended and a huge success! We were able to gather input from a wide variety of brilliant minds. We generated a long list of new ideas and were able to generate consensus on several ideas and goals for CLERC.

The day started with a full group discussion about the draft CLERC mission statement, which was followed by the group splitting up into five focus groups in specific topic areas. The focus areas included: Administration, Programs, Marketing, Fundraising, and Facilities. Each focus group discussed priorities and timelines for development and implementation of the Clear Lake Environmental Research Center, that includes a large Research Laboratory on the shores of Clear Lake and an Education Center that includes K-12 courses in connection with public schools, local community colleges and Marymount University, plus a large Library Center where Education and Administrative Offices might be located.

Each group then presented what they see as the important goals and sub-goals for CLERC between now and the end of the decade. After lunch the group reconvened as a whole to comment on the focus group presentations and discuss resources needed to carry out the goals for the first several years. A list of potential meeting facilities and volunteers was generated and lastly participants provided final written comments and commitments with their preferred contact information.

BIG IDEAS:

One common theme of the day was the idea of CLERC as an umbrella organization, providing coordination of efforts of numerous other environmental and community groups with a focus on Clear Lake. Discussions were had about past scientific research efforts on Clear Lake and previous environmental awareness educational campaigns. One common theme is that these efforts tended to be for a limited duration. A project would be funded for only a short period of time and then would cease operation. One primary goal of CLERC is to keep the research and education going. A steady source of funding should be secured to guarantee a long term presence of science and education on the shores of Clear Lake.

The Programs focus group had several ideas for initial projects for CLERC, both large and small. There has been a significant interest from both the public and private sectors in studying the potential beneficial uses of the cyanobacteria, algae, and other aquatic life forms known to be present in Clear Lake. A significant portion of the group brainstorming session focused on ways CLERC can serve as the go-to agency for anyone requesting to withdraw water samples from Clear Lake for scientific research. There was also discussion about potential pilot projects for harvesting the cyanobacteria to produce methane, ash, compost, medical compounds, and other useful products.

Several educational program goals were discussed including the need to partner with universities and school districts by offering facilities for environmental education. One such facility discussed is the construction of a glass tube that extends to the bottom of the lake, allowing visitors to see different layers of lake life as well as the sediment on the bottom.

The Facilities group discussed options in the short term for office space in order to establish a presence and have a location for meeting and storing CLERC files. The group also set the long term goal of establishing a world-wide destination in Lake County in terms of scientific research and the outreach programs offered to educate the public about the scientific value of Clear Lake. The destination would include a large amount of floor space dedicated to scientific research offices and laboratories, in addition to an educational and ecotourism visitor center. A lodging facility and conference center would be located nearby to house research conference attendees, researchers on location for a temporary basis, students on multi-day field trips, and members of the public who are vacationing at the center. The project could be built in phases to ease acquisition of funding.

Several ideas pertaining to Marketing and Fundraising were also discussed. ***For a complete summary of all the content generated at the strategic planning session, please see the Appendix attached to the end this document.***

NEXT STEPS:

Our next steps include:

1. Establish Full Board of Directors - We are seeking to have an initial board with seven members with a plan to increase that number as CLERC gets more established. In the interest of moving things forward, the four members of the CLERC Formation Committee will serve on the initial Board of Directors.

The initial board members will need to commit to one evening board meeting per month, approximately 2 hours long. CLERC Bylaws will allow teleconferencing for board meetings. The four board members who served on the Formation Committee will continue to meet once a week as the Executive Committee of the Board in order to continue to move the organization along. Executive Committee meetings will be open to other Board members who can be available should their schedules permit.

2. Fill Advisory Committees - we are seeking volunteers to serve on five different committees listed below:
 - *Administration* - this group will continue to establish CLERC as a non-profit 501(c)3 organization, dealing with filing required government documents, accounting, and maintaining the required activities of the Board.
 - *Program* - this committee will be one of the main drivers for determining what scientific research projects and educational programs CLERC will offer. This committee will hit the ground running and be very busy over the next several months pursuing multiple potential projects.
 - *Marketing* - will be focused on defining audiences for targeted marketing efforts along with social media outreach over the next few months
 - *Fundraising* - over the next few months this committee will be focused on obtaining startup funding and working with the program committee to obtain funding for specific projects.

- *Facilities* - this group will focus on securing initial office space in the short run. After that their focus will center on the long term goal of building the world-class destination with input from the program committee.

We are seeking volunteers for all of these committees. Most will start small and add members over time with no limit on members. The committees will decide on their own how many members they will have and when to hold meetings.

3. Launch Website - the Executive Committee is working with a volunteer web designer to secure a web address and launch the CLERC website by August 15.
4. Prepare for Booth at The Lake County Fair, Labor Day Weekend 2014 - this is a great way to start informing the community about CLERC, but with the fair being only weeks away, we are in a hurry to get together the initial display for what will become a vital part of CLERC's outreach program. We discussed including a microscope to view organisms along with water samples from the lake, posters and other visual displays, as well as water bottles or other items with the CLERC web address printed on them for sale as a small fundraiser.

We are in need of volunteers and donations to make this fair exhibit happen! We anticipate needing at least \$1,500 to cover booth fees and the cost of purchasing promotional items.

PLEASE FORWARD THIS DOCUMENT ON TO ANYONE WHO MAY HAVE AN INTEREST IN THE CLEAR LAKE ENVIRONMENTAL RESEARCH CENTER (CLERC).

Send Correspondence to: Carolyn Ruttan, Carolyn.Ruttan@lakecountyca.gov
or
Will Evans, wevans99@gmail.com

APPENDIX

IDEAS FROM CLEAR LAKE ENVIRONMENTAL RESEARCH CENTER (CLERC) STRATEGIC PLANNING SESSION - July 12, 2014

ATTENDEES

- Jo Bennett
- Victoria Brandon
- Carol Cole-Lewis
- Ken Davlin
- Will Evans
- Holly Harris
- Richard Knoll
- Chuck Lamb
- Rick Macedo
- Landa Roon
- Carolyn Ruttan
- Wilda Shock
- Taira St. John
- Mireya Turner

ADMINISTRATION INPUTS:

“This startup period reminds me of a grassroots organization with many different interests, groups, fields of expertise. Crucial to have a role assigned to someone to keep these many groups linked and unified in vision to maintain overall functionality and coherence. This is part of human resource management that plays a huge initial role. Establishment of a board is a great priority.” *Mireya Turner*

“Ideally, something like this would be under the oversight and benefit from the human physical resources of a major research university. Start with a task, then build institutional structure from there. Collaboration with local government is essential, but the institution has to be completely separate.” *Victoria Brandon*

1. Need business, marketing plan, 5yr cash flow forecast.
2. Keep it SIMPLE.
3. Consider nodes vs. hierarchy for organizational structure.
4. This group should seek to become the “guardians” of the lake. *Carol Cole-Lewis*
1. Create a 501(c)3.
2. Establish a board for decision making.
3. Contact private companies in the business of converting/processing algae into finished products.
4. Develop a communication that offers research opportunities on the lake under CLERC authority.
5. Develop CLERC MOI w/County re: algae research & harvesting.
6. Develop a business plan with a 5-year plan & income/expense analysis. *Ken Davlin*

Arrange for pro bono work from existing professionals. *Richard Knoll*

Administrative Focus Group plan:

Now:

1. Try sponsorship over 501(c)3 initially
2. Identify stakeholders (who expresses interest? Who joins the effort?)
3. Establish committee structure.
4. Be flexible, keep it simple. Formalize structure as needed & supported.
5. Prioritize goals.

Year 1:

1. Build relationships that affect goals.
2. Set up social media outreach.
3. Set and achieve one project goal; use as a test run to see how group performs.
4. Build awareness based on achieved test project as basis for funding options.

Year 2:

1. Form board, create bylaws, etc.
2. File non-profit status (CA and IRS).
3. Set up and achieve next project goal.
4. Begin grant writing by listing/prioritizing projects.
5. Develop revenue options (grants, sales, donations, tuition-based programs).

Year 2+:

1. Grant administration w/projects.
2. Implement revenue projects.

2020:

1. Physical plant, paid staff.
2. Ongoing revenue activities.

PROGRAMS/PROJECTS INPUTS:

1. Perform sampling, testing of algae resources.
 2. Develop pilot testing programs to convert algae to methanes, ash, compost, carbon black, medical compounds, pharmaceutical uses.
 3. Conduct pilot tests of economics of harvesting, economics of conversion to products.
 4. Develop a lake model (design & construction)
 5. Create a glass tunnel into the lake bottom at the right location.
 6. Determine ability to convert existing grants/funding to CLERC. *Ken Davlin*
1. Carbon sequestration credits via algae-stored sediment, wetland creation, riparian creation.
 2. Low impact development project for (a) new development, and (b) retrofit existing development." *Rick Macedo*
1. Modeling: Native vegetation vs. invasive, impact on water quality.
 2. Circulate questions as widely as possible, but especially among people with scientific and resource management connections: "What do you want to know about Clear Lake?" and "What do you want to know about the larger world that Clear Lake could teach you?" *Victoria Brandon*
1. Student field trips from all over California to the Clear Lake Research Center for an overnight stay, concert on a lakefront stage, on-the-lake fun.
 2. High level scientific-university level research programs.
 3. Fall, winter, spring (shoulder seasons) tourism promotions, spot – target marketing (for example: target tourism to Clear Lake when the Sacramento valley is foggy for days/weeks. *Richard Knoll*
1. Scavenger hunt with an educational component.
 2. Geocaching with an educational component.
 3. Orienteering? *Carol Cole-Lewis*
- Development of locally-based curriculum – easy to integrate with homeschoolers, private schools. *Mireya Turner*
- Clear Lake computer model based on GIS. Goal is to be able to simulate proposed projects without having to actually do the project. *Will Evans*
- Field trips: Attract students, families from out of county in conjunction with LC Land Trust, Audubon, Historical Society, State parks. *Wilda Shock*

PROGRAMS/PROJECTS FOCUS GROUP GOALS:

July 2014: Tribal connection; Launch initial program website

August/September 2014: Develop social media & begin blogging, begin school presentations

Desired goals for future: Transparent tube to lake bottom, ferry, core display

Educational question: "Why should I need to know about Clear Lake?" – basis for many educational programs

Collaborating organizations: Universities, community colleges, schools, tribes, for-profit companies

Interest areas: Geothermal, hatch, fisheries, cyanobacteria, phytoplankton, zooplankton, heavy metals, benthic community, carbon sequestration, carbon bank credits

FUNDRAISING INPUTS:

1. Geothermal taxes
2. AB 1905 funds
3. Potential \$\$ if Clear Lake hitch are listed under the CA endangered species act.
4. Reach out to tribes for participation & funding sources.
5. Carbon sequestration credits – possible banking options. *Rick Macedo*
1. Banks as partners & grant sources.
2. Museums – tours & fundraising.
3. Colleges – education & fundraising.
4. Sponsorships – memberships. *Jo Bennett*
1. Long term – endowment to provide steady funding (invested savings).
2. Lake products & services (i.e., selling harvested algae). *Will Evans*
1. Federal, state resource grants.
2. Partner with existing groups (Land Trust, others). *Richard Knoll*
1. Kickstart drive/event.
2. Fiscal sponsorship.
3. Create a non-profit business (B Corp).
4. Program-related investments (grants)
5. Membership drive (think Natural History Museum)
6. Must develop Business Plan, Program Plan, Marketing Plan, 5-year cash flow forecast. *Carol Cole-Lewis*
1. Partnership with tribes can provide funding sources otherwise unavailable. *Victoria Brandon*
1. Sale items: (Holly) Microscope greeting cards, café press expert.
2. Outreach: Interpretive outings, guided kayak/boating tours, Audubon partner to pair bird watching with lake.
3. Proprietary photo images (Getty images) for \$\$\$. *Mireya Turner*

FUNDRAISING FOCUS GROUP GOALS:

2014:

1. Determine availability of \$15M funding for Lake Co. Watershed Protection District; develop project to tap funds.
2. Develop membership levels
3. Develop donations program, partnerships, adoption programs.
4. Identify funding sources (federal, state, county, foundations, corporations)

2015-2016: Develop participatory programs to attract attention and revenue, create pride in Clear Lake as a resource. Utilize tours, vendors, existing businesses. Engage schools & public from Lake Co. and other counties. Need volunteers, media, outreach programs.

2017: Collaborate with LC marketing program, museums, businesses to:

1. Develop products for sale with scientific & education focus.
2. Provide health education, testing.

PUBLIC RELATIONS/MARKETING INPUTS:

1. Prepare press releases.
2. Booth at LC Fair. *Rick Macedo*.
1. All media in L.C.
2. Trips for writers, science, business, outdoor.
3. Consumer shows – recreation.
4. Education fairs – Community colleges, high schools.
5. Career day presentations. *Wilda Shock*
1. Change the way we think about the lake.
2. It's not just a summer vacation getaway.
3. Use young people to educate peers to "like" Clear Lake. *Richard Knoll*
1. Determine markets.
2. Develop branding.
3. Create an animal mascot (Rocky the River Otter!).
4. Determine channels to market vs. marketing campaigns
5. Create a competition a la X-Prize for a creative solution to our type of lake's big problem (think Apollo 13). *Carol Cole-Lewis*
1. Media output, I believe, is essential:
 - a. Video spots, where we make our own videos.
 - b. Radio announcements or a monthly radio show where we inform the public of CLERC's progress
 - c. Signage (billboard, adopt a highway road sign, etc.). *Jo Bennett*

MARKETING FOCUS GROUP GOALS:

08/01/14: Finalize mission statement (who are we? What do we do for whom and why?)

08/01/14: Define target markets, develop personas via 1-day workshop

08/01/14: Develop 3-person marketing team

08/15/14: Define target markets, conduct focus groups from personas workshop (economic level, education level, sex, geography, age, size, media, businesses, churches)

09/01/14: Develop branding for target markets (images, colors, emotions, fonts, logo)

09/01/14: Create Communication Plan as part of Business Plan (build marketing membership database, court total media, determine resources, define communication channels on and off line)

09/07/14: Create Communication Plan, Marketing Plan budget as part of 5-year Financial Plan

Jan/Feb 2015: Develop regional/national media campaign as part of larger Communication Campaign, campaign calendar

09/01/15: Create Communication Plan regarding Carnegie Library opening (press release, social media)

2017-2020: International marketing

2017 onward: International campaign to universities, corporations and independent research organizations

June 2021: Grand opening of new research facility

FACILITIES INPUT:

Visitor center with displays. *Wilda Shock*

High school students as research coordinators. *Jo Bennett*

It would be very easy – and fatal – for energy to be diverted to bricks and mortar. Start small, preferably no separate facility at all to begin with. When space is needed, appropriate facilities can be found. *Victoria Brandon*

1. Use Carnegie Library
 2. Consider Dutch Harbor – Natural High for facilities
 3. Consider a complex of scientific facilities, eco-hotel, recreation, entertainment venue
 4. Promote high level museum of Clear Lake history, use, artifacts. *Richard Knoll*
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1. Use cobb housing – natural building
 2. Utilize Holiday Harbor and Carnegie Library. *Carol Cole-Lewis*
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1. Needn't be a huge building.
 2. Library can be entirely digital, leaving room for labs.
 3. Temp housing (state park yurts used for science groups?)
 4. Dormitories – possibly partner with MCU @ the Castle? Partner with Ag for any available Ag housing? (check for needed amendments to zoning ordinances, zoning guidelines). *Mireya Turner*

FACILITIES FOCUS GROUP GOALS:

2014: Basic (temporary) office for files, mail, etc. Needs: Phone, email, internet, PO box, OOMA gateway device. Look for donated space, somewhere free. Determine long-term availability of Carnegie Library for administrative offices. Determine potential use of Natural High, Dutch Harbor locations

February 2015: Establish an office (find office space, set up office). Collaborate with city, county, or private owners. Negotiate lease. Set up office. Acquire office equipment. Need volunteers, fundraising – utilize marketing to acquire these.

Early 2016: Needs assessment for world class self-contained destination facility with lodging, food, labs, educational facilities, retail area.

2016: Determine location for destination facility in collaboration with land feasibility firm, architect, civil engineer

2017-2020: Lease or build world class destination research & accommodation facility – phase 1. Need financing, design

OTHER IDEAS & COMMENTS SUBMITTED OUTSIDE OF PLANNING SESSION:

I can think of three potential possibilities for a building where the center could be located: the vacant commercial building at Holiday Harbor in Nice is one. I don't believe the County currently has any specific plans for that building and it's in a good location, right on the lake. There are two other buildings on the property that could potentially be available for future expansion if needed. It would be great to see something positive happen at Holiday Harbor. The second is the Visitor Center in Lucerne. If the County actually goes ahead and closes that facility this fall (which I don't support but that doesn't matter...), the building should become available and it would be nice to see it used for something that visitors driving along Highway 20 would find of interest and where information about the lake could be obtained. If you are interested in that option you should probably move fast before the building is promised to another department. The third option is the Marymount University campus at the Castle in Lucerne. There is a very large amount of space available in that building that Marymount won't be using and they are very interested in partnering with other higher education institutions in order to fully utilize the available space. There would be some costs for remodeling the rooms that you use, but I don't think it would have to be a lot of money. I can think of a fairly large room on the first floor that would make a great lab and wouldn't require extensive remodeling. It also has a separate entrance door directly to the outside of the building. Just one of many options available for space at the Castle. As I'm writing this I just thought of a fourth option, if a lot of space isn't needed, at least initially. The county has a vacant building adjacent to Nylander Park on Highway 20 in Clearlake Oaks. It's not very large but it has been completely remodeled and is in very nice condition. It was originally intended to be used as a visitor center but that didn't work out. It currently sits vacant, as far as I know. It sure would be nice to see something productive go into that building, which is right in the center of the town.

I hope the meeting goes well. Good luck to you and the others working on this project!

-Kelly Cox

Thank you for the invitation and opportunity to participate in the strategic planning session on Saturday July 12, 2014 at Lakeport City Hall. I thought the planning session was very well organized and produced. I also think the overall idea of a world class scientific based research center that has a strong visitor oriented component is excellent. Congratulations on a great start.

The following is my input and ideas that I hope will help in the development of the CLERC organization and facilities:

1. Think big, think world class. This is the planning stage for CLERC. This is the time to vision and imagine what really could be. Take your experiences and knowledge gained from where you have been and what you have seen around this Country and around the world and apply them here. There should be no limits to what you think CLERC can be.
2. The concept of entering into small deals with projects like algae processors in order 'to get something going' seems to me to be a distraction. If in the planning stage or early implementation stage, something like that emerges as a priority, fine, go with it, but I think it is

important to avoid getting derailed by little thoughts or specific concepts like this, at least early on.

3. There seem to be a few people who have initiated the concept of CLERC. These few people with the vision, imagination and passion for the project should be the ones who move it through the initial planning and development stages.
4. The initiation of CLERC should be from the heart, i.e. enhancing the community and the public good, not from an personal ego perspective.
5. At some point, there may be a need for the initial concept planners to get out of the way and for the organization to hire professionals, but for now, keep things simple in terms of CLERC management and organization. In my view and experience, democracy in matters such as this can be overrated.
6. As the CLERC strategic planning moves forward there should be a policy of minimizing or eliminating the CLERC use of resources from and affiliation with local government.
7. Focus on partnerships with the private sector. Look to partner with well run, ethical land developers and businesses with solid track records and deep pockets. There are quality businesses and developers out there and they look for opportunity for investment. A well-developed CLERC business plan that has a heavy focus on private business partnerships is the key to long term success in my opinion.
8. Avoid having to constantly do small fundraising events. This is what burns people (volunteers) out. I have seen it over and over, good work being done by a few good people and a few good organizations, who have to constantly organize and put on events to raise a few thousand dollars every year to keep going.
9. Why not structure deals with private business....yes - corporations, and let your private business partners, with their big staff's, extensive financing options, and their 'for profit' motives, do the work and pay sufficient revenues to CLERC...so that you can implement and manage your long term vision?

I hope this helps in some way. Good luck to all of you.

-Richard Knoll

WILLINGNESS TO HELP:

Serve on board:

1. Taira St. John
2. Ken Davlin

Serve as advisor:

1. Ken Davlin
2. Rick Macedo
3. Carol Cole-Lewis
4. Taira St. John
5. Richard Knoll

Serve on committee:

1. Jo Bennett (fundraising, youth programs)
2. Rick Macedo

Other:

1. Mireya Turner – *interested in helping in any way that fits between her 2 jobs & 2 high school aged sons.*
2. Carol Cole-Lewis – *Could possibly be available for a specific task for a short period of time.*
3. Taira St. John – *Ombudsman activities*

OTHERS WHO MAY BE INTERESTED IN SUPPORTING CLERC:

Cameron Reeves, Atty – Jo Bennett will try to find him (Taira also volunteered to contact)

Redbud Health Care District, Conrad Colbrandt – Jo Bennett will contact

D. Bufton, NASH – Ken Davlin will contact and respond to Carolyn

Foster ? – Ken Davlin will contact and respond to Carolyn

California Infrastructure Bank – Ken Davlin will contact and respond to Carolyn

Terre Logsdon - Mireya Turner will contact

Sarah Ryan, Paula Britton, Karola Kennedy (Tribal Technical Research) - Mireya Turner will contact

Chris Partido – Taira St. John will contact

Joanne Saccato - Taira St. John will contact

Mike Schaeffer (Robinson Rancheria)

Larry Rey (Scotts Valley Pomo)

Kim & Olga Clymire

Tom & Val Nixon

Peggy King

Rodney Duncan

Conrad Colbrandt

Wally Holbrook

BARRIERS/OBJECTIONS:

1. Need steady, reliable income
2. Easy to wear out volunteers; same people always involved
3. Lack of institutional structure presently
4. Public perception of Lake Co. – need to turn around both locally and outside of county
5. Perceived duplication of efforts from past projects
6. Lack of imagination/open minds to thinking BIG
7. Defensiveness/insecurity regarding Lake Co.
8. Lack of pride re: Clear Lake
9. Multiple groups not working together; lack of collaboration
10. Lack of fundamental understanding of a “balanced” Clear Lake
11. Lack of education regarding Clear Lake’s role in the regional watershed

IDEAS FOR OVERCOMING BARRIERS:

1. Create information outreach where it’s easily accessed in a way people can understand.
2. Think BIG, be fearless.
3. Accept and celebrate what we are, the resources that we have. Make a big deal out of how Clear Lake is special in the country and in the world.
4. Create a plan for collaboration among groups.
5. Create plans to address each of the barriers listed above.

FACILITY SPACE IDEAS:

Kelseyville:

Lake County Wine Grape Commission – meetings

Lakeport:

Vector Control: Meetings, possible lab space, piers, boats

Lakeport City Hall: Meetings

Nice:

Holiday Harbor, laundry mat – possible administrative or lab space

Lucerne:

Marymount – possible administrative, lab, conference space

Harbor Village cabins – administrative space

Lucerne Visitor’s Center – administrative, public education space, meetings

Clearlake Oaks:

“Visitor’s Center” – administrative space, meetings

Clearlake:

City Chambers – meetings

Lower Lake:

Community Development Office – meetings

Middletown:

Cal Pines Conference Center – meetings

Senior Center - meetings

MISSION STATEMENT:

Draft Mission Statement:

"The Clear Lake Environmental Research Center (CLERC) exists to advance scientific discovery and understanding of global environmental and economic challenges, and to implement documented solutions."

Too vague, lacks focus

Focus on intrinsic value of Clear Lake – balance natural resource with how it will help Lake County

Focus on its being a unique laboratory; Clear Lake as a natural lab

Focus on being a collaborative organization; CLERC as a home facility/base for lake research

Focus on wellness, human health, health benefit products

Include green component – clean up Clear Lake’s negative characteristics (i.e., methane reuse)