



CENTRAL VALLEY BIRD CLUB

STRATEGIC PLAN

2024–2030



The Central Valley Bird Club was established in 1997 to unify birders and share knowledge of birds in California's Central Valley. The first Central Valley Birding Symposium took place in December 1997, with 160 participants. Despite the challenges many non-profit organizations face, our club is still thriving after 27 years.

The club's Board of Directors has gathered informally over the years to consider the future of the organization, but this is our first formal strategic plan. As birding and society have evolved over the last 27 years, so too must our goals and methods evolve. Increased human population pressure, climate change, and habitat loss pose threats to birds and their habitats. Cultural diversity within the Central Valley continues to change. To stay relevant, the Board must guide the club forward in a meaningful and purposeful way.

The symposium is still an active and well-respected meeting, now annually attended by over 300 people. Our journal, *Central Valley Birds*, is respected as the only peer-reviewed, regional ornithological journal in California. The Board's professional expertise is leading to a greater conservation impact and increased public awareness of our bird resources.

As a Board, we are formally taking time to consider our strengths and weaknesses, new opportunities, and expanded outreach. We will involve our members in this planning process. This 5-year plan will help us define our goals in a unified and thoughtful way to keep the organization relevant and viable for years to come. Thank you for your ongoing commitment to our club and to this look to the future.

Pat Bacchetti, President
October 2024

Organizational Assessment

STRENGTHS



REPUTATION
KNOWLEDGE
SCIENCE-BASED
FINANCE
FORWARD
THINKING

WEAKNESSES



DIVERSITY
CAPACITY
COMMUNICATIONS

OPPORTUNITIES



BIRDING
POPULARITY
FUNDING
COMMUNICATION
EXPERTISE
SCIENCE SHARING

THREATS



COSTS
HEALTH/
DEMOGRAPHY
COMPETITION
DEVELOPMENT

Organizational Assessment

In evaluating our organization, we identified both internal factors (strengths and weaknesses) and external factors (opportunities and threats) that are affecting, or could affect, our club's success.

Strengths

- *Reputation.* Longevity, loyal membership, respected for our journal and symposium, and charismatic symposium leader.
- *Knowledge.* Dedicated and knowledgeable Board, substantial knowledge and expertise of our members, and capable leaders of the symposium and *Central Valley Birds*.
- *Science-based.* Sound and applicable scientific information provided to educate members and promote conservation through *Central Valley Birds* and the symposium.
- *Finance.* Healthy finances and practices, and solid relationship with our vendors.
- *Forward Thinking.* Increased contacts with younger birders and scientists, actively address issues as they arise.

Weaknesses

- *Diversity.* Skewed membership demographics, member diversity and geographic representation don't reflect the Central Valley's emerging and changing human population. Potential members in north and south valley not involved due to travel distance.
- *Capacity.* Reliance largely on success of symposium for funding, difficulty recruiting leaders, rely on too few individuals, and sometimes too set in our ways.
- *Communications.* Lack of currency with modern communication channels is reducing our effectiveness with current members and a broader diversity of potential members.

Organizational Assessment

Opportunities

- *Birding Popularity.* Increased interest in birding and continued human population growth in Central Valley.
- *Funding.* Increased funding from member donations, an endowment, and bequeaths and explore collaborations that further our mission.
- *Communication.* Zoom offers more opportunities for those in north and south valley to participate as Board members and other potential club activities.
- *Expertise.* Can offer more of our members' skills to publish journal articles and contribute to community science and offer unique knowledge to local conservation efforts.
- *Science Sharing.* Increase education regarding science developed through *Central Valley Birds* and other programs through enhanced public engagement.

Threats

- *Costs.* Rising costs of events and resulting potential for reduced attendance.
- *Health/Demography.* Aging demography may reduce our membership pool and members' willingness to travel to the symposium. COVID-19 re-emergence or other diseases could disrupt our symposium.
- *Competition.* Schedule conflicts with other conference events.
- *Development.* Continued human population growth diminishes habitat and the public perception that the Central Valley is important to birds and other wildlife.

MISSION

The Central Valley Bird Club is a community dedicated to the enjoyment, study, and conservation of birds in California's Central Valley.

VISION

By 2030, the Central Valley Bird Club will continue offering our flagship high-quality symposium and journal, and it will build capacity to enhance communications and involvement with members, potential recruits, and partners in the birding, science, and conservation communities.

VALUES

- We welcome and serve all people interested in birds and work actively to support and encourage new birders, young people, and historically excluded groups.
- We develop and harness our members' expertise to contribute to the scientific understanding and conservation of birds.
- We actively pursue our mission and vision to contribute to the study, enjoyment, and conservation of birds.
- We collaborate with others who have similar missions and values.
- We are financially responsible and accountable.
- We are non-bureaucratic and flexible but disciplined.

KEY STRATEGIC INITIATIVE: ENHANCED COMMUNICATIONS



A primary, overarching goal for the next 5 years is to communicate and collaborate more effectively with our current and potential members, supporters, and the public.

This effort will increase our outreach to attract students and other younger members, expand our reach throughout the Central Valley and beyond, improve access to our journal, and increase our public visibility.

Under this initiative, we will develop a more active and effective web presence, add new social media channels, make *Central Valley Birds* articles more immediately accessible, conduct regular workshops and field trips, and more actively collaborate with partner conservation organizations.

Components of this initiative are incorporated into the goals and objectives of the committees.

Program Goals & Objectives

Much of the Central Valley Bird Club's work is conducted by standing committees. This section identifies a comprehensive set of Board-led program committees and program committee goals and objectives for the plan period.

Leadership & Finance

Communications & Membership

Symposium

Publications

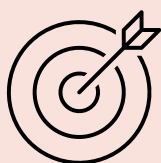
Youth Birding Scholarship

Conservation & Research

Workshops & Field Trips

Leadership & Finance

The Club Officers (President, Vice-President, Secretary, and Treasurer) oversee the main operations of the club, including overseeing the Board of Directors, directing committees, and ensuring the club's financial health.



Goal: Maintain proper oversight of Club operations and achieve strategic plan objectives

Objectives

- Organize meetings of the Board of Directors quarterly or as needed. At least one meeting per year will be held in person, if possible.
- Identify and recruit members to maintain a Board of at least nine individuals. Maintain succession of Officers and other Directors with essential duties by identifying interested members for future leadership cycles (next cycle: President, Vice-President, and Membership Coordinator; following cycle: Secretary and Treasurer).
- Regularly review committee actions and evaluate committee structure and composition as needed to meet strategic plan goals and objectives.
- Update the by-laws and annually review and update them as appropriate.
- Maintain records of Club policy documents and Board meeting minutes.

[continued]

Leadership & Finance

[continued]



Goal: Maintain proper financial controls and reporting

Objectives

- Oversee Symposium Committee expenses and income to ensure that the event is sustainable given increasing costs.
- Explore other means of income to keep the Club solvent and support its priorities and programs.
- The treasurer will:
 - Pay all bills in a timely manner
 - File the Club's taxes each year and maintain registered non-profit status
 - Report current financials to the Board at each meeting
 - Maintain current insurance policies, and
 - Prepare any additional Board-requested reports.



Communications & Membership

The Communications and Membership Committee provides regular and varied communications with the Club's membership. Membership is tracked by the Membership Coordinator.



Goal: Increase the frequency and diversity of communications on the Club's programs and benefits to inform, maintain, and attract membership. Maintain the Club's list of members and their current contact information and membership status.

Objectives

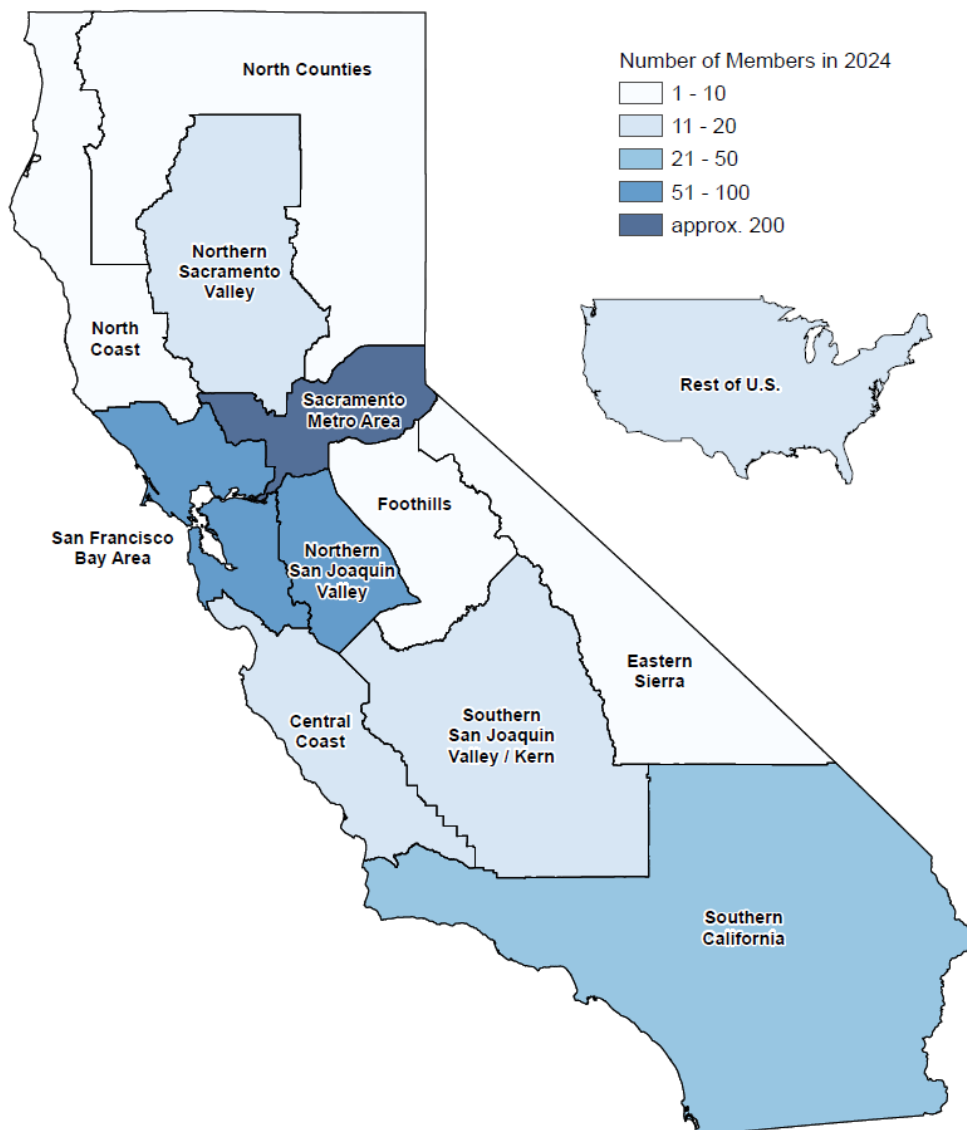
- Select and implement a management software system to streamline membership management and facilitate succession of the Membership Coordinator.
- Work with a hired contractor to develop a new more flexible website design so Club news, advertisement of events, and editions of *Central Valley Birds* are provided online in a timelier manner.
- Increase outreach into the northern and southern Central Valley to serve and recruit new members by developing and distributing articles periodically about benefits of club membership to local Audubon/Bird club newsletters; also develop a program to present to local bird groups, garden clubs, student bird clubs and academic settings, and publicize our availability to present it.
- Explore capacity (personnel and financial) to represent the Club at like-minded events, such as the Western Field Ornithologists annual conference, Snow Goose Festival, and the Lodi Sandhill Crane Festival.

[continued]

Communications & Membership

Objectives [continued]

- More consistently communicate with the Club membership. Publish Board member biographies, reports, and photos on conservation efforts, field trips and workshops. Consider the best format to balance increased communication with workload (e.g., newsletter, summary emails of news posts, annual report). Use these communications to solicit more member participation.
- Expand our social media presence. Recruit an interested board member or volunteer to post regularly.



Symposium

The Board Symposium Committee identifies an Annual Symposium Committee that is led by Board members. The Board Symposium Committee directs and guides the Annual Symposium Committee to ensure the Symposium's success in serving our members and generating revenues to support the Club's programs and priorities. The Annual Symposium Committee undertakes all the actions needed to ensure a successful event.



Goal: Deliver an annual Central Valley Birding Symposium that attracts, educates, and entertains our community of members and guests and provides funding to support other club programs and activities

Objectives

- Support the Annual Symposium Committee as they develop a detailed program for the annual event.
- Pursue a hired independent event coordinator to take over organizing the Symposium in coordination with the Annual Symposium Committee.
- Oversee Symposium expenses and income and coordinate with the Leadership & Finance and Communications & Membership Committees and entire Board as needed to ensure that the event is sustainable given increasing costs.
- Develop a strategy for the Symposium to generate more income for the Club.
- Review post-Symposium reviews from the Committee and attendees in order to address concerns and recommend improvements for subsequent years.

Publications

Our quarterly journal, *Central Valley Birds*, annually publishes 10 to 15 peer-reviewed papers, totaling roughly 150 pages. The journal Editor, Assistant Editor, and Layout Editor, along with a 12-member Editorial Board, solicit submissions, approve content, oversee paper reviews, provide graphic layout, and coordinate printing and distribution. The Special Publications series periodically publishes longer works, such as past books: *Life in the Fastlane* on Sacramento Purple Martins and *Sacramento County Breeding Birds*.

The Publications Committee oversees the production of *Central Valley Birds* and the Special Publications. The Committee also coordinates with the Communications & Membership Committee in making articles available online and marketing special publications.



Goal: Maintain the quality of *Central Valley Birds* and our Special Publications and increase their visibility, submission pool, and long-term sustainability

Objectives

- Achieve full, open access to *Central Valley Birds* through Google Scholar.
- Make journal issues fully available on-line at the time they are published.
- Develop and implement outreach plans to universities and colleges; local, state, and federal resource agencies; environmental consulting companies; and non-profit conservation groups in the Central Valley to encourage manuscript submissions.
- Prepare a “job description” for the many duties of the journal Editor.
- Develop and implement a training and succession plan for the Editor, Layout Editor, and Editorial Board Chair.
- Periodically reassess hard copy vs electronic publishing of journal.

Youth Birding Scholarship

The Youth Birding Scholarship Committee promotes the development of new birders and scientists by awarding birding camp scholarships to young birders. The committee coordinates with the Communications & Membership Committee to publicize scholarships and grants.



Goal: Operate a birding scholarship program that develops and recruits the next generation of dedicated birders, scientists, and resource managers

Objectives

- Offer birding camp scholarships annually to youth birders in accordance with the March 2022 David Yee Scholarship Fund management policy.
- Emphasize provision of scholarships to youth birders who would otherwise be unable to attend camps and would contribute to diversifying the birding population.
- Build a funding base to support a sustainable scholarship program.



Conservation & Research

The Conservation & Research Committee focuses on facilitating club member and student involvement in research and monitoring studies that support avian conservation in the Central Valley. It comments on conservation programs and environmental documents when the club and its members have unique knowledge and issues are highly important to Central Valley birds and their habitats. The committee also awards grants to university and college students to support avian research projects in the Central Valley.

The committee coordinates with the Leadership & Finance Committee in taking formal positions on behalf of the club and the Communications & Membership Committee to educate and activate members on conservation issues and opportunities.



Goal: Increase our capacity to use our skills and knowledge to influence key conservation issues affecting birds in the Central Valley, support conservation actions, and help develop new avian conservation scientists

Objectives

Research Grants

- Enhance awareness of the student research grants program through outreach at universities and colleges in and adjacent to the Central Valley.
- Offer at least two student research grants per year that address the status, biology, or conservation of birds in the Central Valley.
- Use enhanced communications to solicit more donations to the Waldo Holt Conservation Fund, to be dedicated to supporting more and larger student research grants or other conservation-oriented grants.

[continued]

Conservation & Research

Objectives [continued]

Conservation

- Recruit non-Board members as active committee participants.
- Develop and implement a plan to identify conservation priorities for conservation attention.
- Increase member involvement in surveys supporting conservation assessments of Central Valley birds (e.g., Tricolored Blackbird, Mountain Plover, Burrowing Owl, Loggerhead Shrike, Purple Martin) by working with conservation agencies, universities, and other groups to identify studies and recruit and train members to participate.
- Develop a succession plan for Committee Chair and members.
- Increase partnerships with like-minded organizations to leverage our and their capabilities and develop an outreach plan.
- Bestow an annual Conservation Award winner chosen via a nomination process open to members.
- Support key research and on-the-ground conservation activities through the Waldo Holt Conservation Fund.



Workshops & Field Trips

This committee offers workshops and field trips to involve, educate, and entertain club members.



Goal: Deliver a regular program of educational field trips and workshops as a member service

Objectives

- Organize two or more field trips per year (besides at the symposium) throughout the Central Valley to encourage recruitment and participation of members from throughout the valley.
- Conduct at least one workshop per year (other than at the symposium) on bird biology, identification, survey, or conservation.



Implementation & Monitoring Plan

Activity	Description	Reporting Frequency
Key Communications Strategic Objectives	Organize committee meetings to identify specific tasks and allocate work as needed to make progress	Progress reporting and Board direction provided at Board meetings
Meeting Committee Objectives	Meet as needed to make progress toward goals	Progress reporting by Chair at Board meetings
Monitoring Accomplishments	Regularly monitor progress toward achieving strategic objectives	Review accomplishments at Board meetings and annually at Symposium
Strategic Plan Review	Review Strategic Plan to verify its continued relevance and need for revision	Annually at Board meeting



This plan was completed by the 2024 Central Valley Bird Club Board of Directors:

Officers

Pat Bacchetti, President

Cliff Hawley, Vice President

John Harris, Secretary

Lily Douglas, Treasurer

Directors

Daniel A. Airola

Frances Oliver

Stephanie Levins

John Sterling

Additional thanks to Andrew Engilis, Jr.

Media Credits:

Lily Douglas: photos: Organizational Assessment, Key Strategic Initiative, Conservation & Research, Implementation & Monitoring Plan; map: Communications & Membership

Oscar Moss: photo: Youth Birding Scholarship group

Ronan Nicholson: photo: Youth Birding Scholarship nature journal

Susie Nishio: photos: cover, Workshops & Field Trips