



# CARMEL VALLEY SAVE OPEN SPACE

## Business Plan

***Mission Statement:*** To save open space land in Carmel Valley for the benefit of the community.

***Vision:*** Through community efforts we will have acquired and preserved open space throughout Carmel Valley.

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# Carmel Valley Save Open Space (CVSOS)

**Mission Statement:** To save open space land in Carmel Valley for the benefit of the community.

**Vision:** Through community efforts, we have acquired and are preserving open space throughout Carmel Valley.

## **BUSINESS PLAN**

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### **❖ ACKNOWLEDGMENTS**

Special thanks to all the CVSOS Board Members and other volunteers who contributed information to this plan: Joseph Hertlein, Board Chair; Sandra Schachter, Board Secretary; Lorraine Surprenant, Development Committee Chair; Jeff Ohlson, Historian and former board member Dale McCauley.

## ❖ EXECUTIVE SUMMARY

The Carmel Valley Airfield plays an important and major role in protecting the area from natural disasters and as open space for use by the community. The property is currently for sale as three lots at a total price of \$3,650,000. The owners have indicated they are willing to sell it for \$3,100,000 as a single parcel to the community.

The Carmel Valley community is at risk during an emergency because of the nature of the highly flammable wooded canyons, narrow and limited road access and a growing number of tourists that are unfamiliar with the area. The area weather patterns have intensified and they, in turn, are affecting coastal erosion, increased wind events and fast moving wild fires.

In June 2018, a community of concerned citizens came together to address the need to preserve the airfield as open space. They decided to purchase the airfield and began organizing to make that happen. In order to be able to raise the funds needed to purchase the airfield, it was decided to form a nonprofit organization as the most direct way to leverage financial resources needed to be considered a serious potential purchaser of the property.

Carmel Valley Save Open Space (CVSOS) was formed, a board recruited along with numerous volunteers and about 400 supporters to save the airfield from development. Five committees support the work that was needed to prepare and make an offer on the airfield property. Once the property has been secured, ongoing research and discussions will help CVSOS make a decision about which group or organization could best manage and maintain the property into perpetuity. It is anticipated that one of the most logical groups for this would be the Carmel Valley Recreation and Park District.

The property is unique and valuable as part of the community's history and identity. It has historically been utilized as an open space area by the community. Because of its uniqueness, it is difficult to appraise and agree to a fair market value. It has been on the market as a single 30 acre parcel to be subdivided into 18 market rate home sites and one affordable housing site with six inclusionary units. The property is now on the market as three separate lots of roughly 10 acres each. This change makes it more likely to be sold. CVSOS is committed to purchasing this property and seeing it be maintained as a resource for the community.

## ❖ INTRODUCTION

The Carmel Valley Airfield property deserves the community's immediate attention because of the important and major role it plays in protecting the area from natural disasters, as well as, its historic use as open space by the community. Because the 30-acre parcel is open and flat with very few trees, it is ideal as a staging area particularly during wildfires, other natural disasters or emergencies and the rest of the time as open space for use by the community. There is no other property like it in the area. In addition, it is vacant land with no major restoration needed. Maintenance costs, including insurance and mowing once a year, amount to approximately \$4500 annually. There is an elementary school, a fire station, post office and small motel a block away. The property is surrounded by private homes and several small apartment buildings. The property is currently open to informal public use and unrestricted non-vehicular access.

The property is currently zoned for low density residential with a one unit per lot restriction that allows a second accessory unit or guest house because the lots are larger than five acres. Smaller supportive structures such as garages, shops and sheds are also allowed.

There is a cap on the total units allowed in Carmel Valley of 190 new lots. The Carmel Valley Master Plan Supplemental Policy has reserved 18 single unit family lots and six inclusionary housing units for development with approximately 20 acres of dedicated public space in that plan specifically for this property. There are several water wells which support development of this property, but there is no public sewer. Onsite sewage and waste water treatment must be handled privately by the buyer or developer.

The property is currently for sale as three lots at a total price of \$3,650,000. Area residents have come together to protect the airfield property from development by organizing to purchase the property and help ensure its future as permanent open space. The development of any of the three lots potentially precludes the property's ability to support fire crews and a helicopter staging area. Time is now a factor.

Many local residents are involved in the effort to purchase the airfield for the community. They participate in a variety of ways and are committed to not only purchase the property, but also to decide on the most useful and appropriate way to maintain and preserve this property for future generations.

## ❖ HISTORY

The Carmel Valley Vintage Airfield was originally developed by Byington Ford and his brother Tirey Ford in 1941. The airfield was purchased by Peter Delfino in 1952. After six decades of public-use flying, its operating certificate was surrendered in 2002. The flat 30-acre property is currently for sale by the Delfino Family Trust as three large developable lots.

### **How the Idea Came About**

The Carmel Valley Airfield is a beautiful piece of property with stunning views of our entire valley. In December of each year, it has been the scene of one of the community's most cherished events, Santa's Fly-In, for 60 years. During the rest of the year, it provides Valley residents and visitors with a peaceful venue as open space.

Most importantly, the airfield property has been the strategic staging ground for personnel and equipment during emergency operations to address natural disasters and other emergencies for many years. It has provided a home encampment for hundreds of firefighters and a refueling base for helicopters during recent fire disasters that threatened homes and life in the Valley, neighboring communities and wilderness areas.

For example, the airfield property was used in 2008 as a staging area to fight the nearby Big Basin Complex Fire. "Together with the earlier Indian's Fire, over 240,000 acres were burned, mostly in the Los Padres National Forest. More than 2,000 firefighters from all over the United States, including the Carmel Valley Fire Protection District volunteers, battled this fire for five weeks before its containment." \*An encampment for 1,500 firefighters with a mess hall had a capacity to feed 500 people at a time.

In the late summer and early fall of 2016, "CAL FIRE utilized the airfield once again during the Soberanes Fire that burned more than 130,000 acres and became one of the most expensive wild fires in U.S. history. More than a dozen helicopters and their support operations were stationed at the vintage airfield. The current owner of the property has allowed this in the past, but now wants to sell the property.

In June, 2018, a group of concerned residents came together to save the airfield property from development. Their stated mission is to purchase it in order to guarantee its future use for emergency purposes and as open space. Mary Delfino of the Delfino Family Trust has stated a desire to see the property remain available to the community.

In August of 2018, CVSOS received its nonprofit status and the group has been at work ever since recruiting volunteers for the Board of Directors and for committees to implement strategies that will accomplish their goals.

Supporters of note include District 5 Monterey County Supervisor Mary Adams, District 29 Assembly Member Mark Stone, Congressperson Jimmy Panetta, and Sylvia and Leon Panetta.

## The Larger Context in which the Idea Exists

The county has been the site of a number of emergencies and major disasters over the years including: the Marble Cone Wild Fire of 1977, the Loma Prieta earthquake of 1989, numerous floods like the devastating El Nino events of 1995-1997, the Basin Complex and Indians Wild Fires of 2008 and the Soberanes Wild Fire of 2016. Of special note are the landslides that annually close the Big Sur area along Highway 1--the Mud Creek Slide area is still not stable. It is the largest landslide in Monterey County history.

Property owners are at risk during an emergency because of the nature of the highly flammable wooded canyons, narrow and limited road access and the growing number of tourists on the roads. The area weather patterns have intensified and they, in turn, are affecting coastal erosion, increased wind events and fast moving wild fires. The *Chico Enterprise-Record* newspaper, which has identified emergency low-access areas in California, has identified the 93924 area as extremely low-access for disasters.

Property owners, public agencies, tourists and businesses would all benefit from the emergency protection that the airfield offers. The property has been used consistently over the years by Cal Fire and PG&E. to support firefighting and emergency staging activities (including vehicular and other accidents where victims have been airlifted to nearby hospitals). Because of this, the Monterey County Office of Emergency Services has identified a plan for protecting the area. It is called "The Whole Community Approach" and it consists of Preparedness, the Initial Attack and Damage Assessment, the Intermediate Restoration of Lifelines, and the Long-Term Recovery & Rebuild Phases. The airfield property offers support for all of these phases.

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\* Research by Jeff Ohlson, Curator of the Carmel Valley Historical Society, from *A History of the Carmel Fire Protection District and Valley Volunteers 1946—2001* (Published 2015) & *A History of the Carmel Valley Vintage Airfield 1941—2002* (Published 2018)

## ❖ THE CHALLENGE

### **The Challenge:**

The property is currently for sale and could be purchased at any time for development as it is zoned appropriately. This would preclude use of the land for fire protection, emergency use, or open space.

CVSOS was founded because of the vital role the historic airfield has played in protecting parts of the Monterey Peninsula in past catastrophic fires and other disasters. In addition, the property is part of the community's open space. Its continued availability for emergency services to address future natural disasters needs to be ensured, especially because the wildfire season in California has become a year-round challenge that cannot be ignored. Too many people in California have lost their homes to wildfires in the past and have learned how difficult and expensive it is to rebuild.

The airfield property is a safety net for the immediate Carmel Valley Village residents and protects the entire Monterey Peninsula, from Cachagua to Carmel Highlands and parts of the Big Sur coast. It has shown to be a vital asset to the community and has been used as a staging area during natural disasters and emergencies. In addition, it could serve as a "shelter in place" area for the community if roadways were inaccessible.

### **Meeting the Challenge:**

In order to raise the funds needed to purchase the airfield, it was decided to form a nonprofit organization, CVSOS. This is the most direct way to leverage the financial resources needed to be a serious potential purchaser of the property. CVSOS is the community nonprofit that will be the vehicle to raise the funds and purchase the airfield for community use.

The chances for loss of life and property can be greatly reduced if we make best use of a critical resource, the Carmel Valley airfield property. The impact of the 2016 Soberanes fire would have been much more devastating and deadly if the helicopters and crews had to be staged further away because of a lack of open space. This is also true for the 2008 Big Basin fire when the airfield was used as a firefighter camp.

## ❖ ORGANIZATION DESCRIPTION

### Structure

Carmel Valley Save Open Space (CVSOS) is a 501 (c) (3) nonprofit organization (EIN #83-1817028) incorporated August 6, 2018 for the initial purpose of saving the airfield property from any kind of development. (See Attachment A for IRS Tax Exemption Letter).

CVSOS currently has a seven member board of directors (See [Attachment B](#)) a number of volunteers and 400 supporters (See [Attachment C](#)) who participate in various ways. Five committees implement the work needed to accomplish the organization's goals.

### Personnel

The Board of Directors is led by an Executive Committee made up of the officers. They are:

Chair: Joe Hertlein  
Vice Chair: Eric Sand  
Secretary: Sandy Schachter  
Treasurer: Alan Cosseboom, CPA

They act as the volunteer leaders and coordinators of the organization in guiding and managing the work to be done. There is no paid staff at this time. The full Board meets twice a month.

*The committees are:*

- 1) Fundraising—Chair: Eric Sand  
Identifying a list of individuals and/or businesses for large-sum donations.
- 2) Development--Chair: Lorraine Surprenant  
Supporting the Fundraising Committee's efforts by developing a wide variety of fundraising strategies.
- 3) Outreach--Chair: Kathleen Hendricks, Co chair: Lucy Morris  
Communicating with the public and letting them know about the situation and how they can help.
- 4) Governance--Chair: Joe Hertlein, Co chairs: Eric Sand, Lorraine Surprenant  
Researching and recommending potential management options for the property's most appropriate future.
- 5) Nominating—Chair: Cynthia Hall  
Identifying and recruiting board and committee members. Submit names to the full Board for a vote.

(See [Attachment E](#) for detailed descriptions of the work of each committee).

## ❖ OPERATIONS

### **Bylaws**

The bylaws act as a framework within which the organization operates. They are a requirement of an incorporated nonprofit organization. In order to increase diversity of the board, the number of board members has been changed in the bylaws from a maximum of nine to eleven. The bylaws are available for review upon request.

### **Main Strategy**

The primary strategy for CVSOS is to put a strong organizational infrastructure into place so that an offer could be made on the property. Purchase of the property may include a community assessment and/or taking out a loan that would require raising the money to pay off the loan. (See Attachment G for a "Possible Budget" that would outline key strategies for raising the funds needed to pay back a loan). Then, the property may be turned over to an organization responsible to the community.

### **Communications**

Currently, all business is conducted by volunteers out of their homes and in local community places for meetings. All of the committees use email to circulate announcements, agendas and keep minutes. All of the committees are connected through email and there is a master list managed by the Outreach Committee. We have a drop-box account for documents and donor packages. In addition, we use the website to reach our supporters along with the larger community. Constant Contact is used to reach the whole community through email for updates and community meeting announcements.

### **Community Meetings**

For a large group meeting, the Community Room on Ford Road can be used which seats over 100 people. Public community meetings have been held as follows: June, July, August and October of 2018, and so far in 2019, May 2nd and June 20th. (See Attachment H for more details.)

### **Infrastructure**

Although there is no paid staff, the organization's infrastructure is maintained thanks to volunteers who have offered office supplies, copiers and computers to do the work needed to strengthen the organization's framework. A SWOT exercise points out the strengths and weaknesses of the organization with recommendations for opportunities to address areas that could impact the outcome of the CVSOS's work. (See Attachment I for the SWOT analysis)

## ❖ COMPETITION

The property had been on the market for years as a 24 lot subdivision. With that option seemingly being economically not viable, the property is currently listed as three separate lots of roughly 10 acres each. This listing makes the property more likely to be sold.

## ❖ MARKETING

### Target Groups

The group most interested in the airfield property is probably made up of those residents who live the closest. However, everyone in the area and in Monterey County should be interested in order to make sure the property is purchased for open space. All of the Monterey Peninsula, as well as Big Sur and the Cachagua area, could be impacted by the next wildfire or other disaster.

### Marketing Strategies

Our plan for regular marketing activities includes:

- Print Media: **Regular** listings of CVSOS activities; highlights of airfield history and volunteer opportunities  
Sources: Monterey Herald, Monterey County Weekly, Carmel Pine Cone, church bulletins, local newsletters (CVA, etc)
- Social Media: Same as print media and on a regular basis.  
Sources: Facebook, Instagram, Twitter, other
- TV/Radio: Periodic announcements to keep the CVSOS name in mind  
Sources: TV: KSBW, KION, AMP (Access Monterey Peninsula)  
Radio: KWAV, KAZU, Clear Channel, etc
- Collateral: Website with videos, etc., brochures, postcards, database of names  
Sources: Libraries, senior centers, community centers, sports and fitness centers, other businesses; send mailing to all (possibly including a mailing with utility bill)
- Activities: Presentations including power points and videos to various groups to inform them about CVSOS, our activities and opportunities to get involved. Potential key community partners: Carmel Valley Association, Carmel Valley Forum, Carmel Valley Chamber of Commerce, Carmel Valley Historical Society, other  
Sources: Service clubs, church groups, business groups, other

### Data Collection

We will track the responses to various types of marketing strategies in order to make sure our resources are being utilized for best results. Every effort will be made to ensure participation by as many residents as possible to assist in the work of the organization and to be able to express their opinions about the purchase and use of the airfield. Community survey results will be shared.

## ❖ FINANCES

As with any new nonprofit organization, the start-up phase requires a great deal of volunteer time and donations to cover the cost of incorporation, professional fees, and supplies. The attached budget reflects the startup costs and the first year income and expenses. (See Attachment J for the first year 2018 balance sheet and income and expenses).

In addition, projections will be made to address upcoming years of operation so that preparations can anticipate expenses with appropriate strategies to raise the needed funds. (See Attachment K for the 2019 budget and income and expenses).

## ❖ FUNDRAISING PLAN

Development activities will consist of a variety of strategies to raise the funds needed to purchase the airfield property and run the organization.

### Strategies

- Establish/confirm budget to run organization
- Confirm the exact amount of offer for the property
- Pursue a property-owner-approved benefit assessment

### Major donors

- Identify 10 to 15 major donors who are capable of gifts at a minimum of \$25,000 to \$50,000
- Use donor packet and business plan
- Establish relationships—People donate when they know who you are and what you are doing; relationships need to be cultivated. CVSOS will plan events at airfield and in community. CVSOS will maintain presence at local events and throughout the community
- Give tours of the airfield

### Smaller individual donations

- Use donor packet
- Send solicitation letter—emphasis on Monterey County Gives Campaign

### Events

- Note that October 2018 event netted \$2,200
- Plan larger event
- Implement smaller events on regular basis

### Monterey County Gives! Campaign—November/December

- Prepare for application deadline (July 31st)
- Encourage online donations—a match is given at usually between 12 & 15%
- Note that this campaign provides widespread exposure

### Government and other agencies

- Identify possible partnerships, grant and contract opportunities with government agencies that address fire safety and other natural disasters
- Develop partnership with Monterey County Office of Emergency Services

Local Businesses

--Solicit sponsorships with plaques or some other means of signage on the property to acknowledge donors: Signage on benches? Name field for major donor?

Foundations

Submit grant proposals to the following:

--Community Foundation for Monterey County, Monterey Peninsula Foundation, United Way Monterey County, Packard Foundation, government agencies (grants or contracts) and other foundations (private and corporate) where funding priorities/interests center around disasters and safety.

❖ **CONCLUSION**

CVSOS is an extremely important organization to the future of Carmel Valley and surrounding areas. It is imperative that the airfield property be purchased for permanent use as open space. Our lives could depend on it!

## *Carmel Valley Save Open Space*

### **ATTACHMENTS**

- A        IRS Tax Exemption Letter
- B        Board of Directors List & Biographies
- C        List of Supporters
- D        Survey Responses
- E        The Committees
- F        Articles of Incorporation
- G        Possible Budget for CVSOS
- H        Community Meetings
- I        SWOT Analysis
- J        First Year—2018 Income & Expenses
- K        2019 Budget & Income & Expenses