



Islamorada Foundation Strategy 2018-2021

for Land Protection and Stewardship

*Providing the means, motivation and leadership to protect, conserve and
manage open space in Islamorada*

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Executive Summary

This is the strategy for the Islamorada Foundation covering the 2018-2021 period, articulating the direction and priorities of the Foundation and how it will serve the Islamorada community through open space protection and stewardship.

The Islamorada Foundation is a US 501(c)(3) nonprofit organization based in Islamorada, Florida whose mission is to provide the means, motivation and leadership to enhance, conserve and preserve open space in the Village of Islamorada to support our quality of life and economic well/being. Over the next several years the Foundation will accomplish its mission through a series of measurable and achievable goals and objectives, including preserving land through open space acquisition, conservation easements and land stewardship; strengthening the Foundation Board of Directors; developing philanthropy as a primary driver for land acquisition, conservation easements and property stewardship; and developing partnerships with other organizations that are aligned with the Foundation's mission and vision.

The resulting strategy and prioritized goals and objectives will help to focus time and resources and evaluate measurable outcomes. This strategy aims to provide guidance to the Board of Directors through the year 2021. The Board will annually use the strategy to plan and align activities, stay accountable to priority goals, and review and modify goals in response to internal changes and external threats and opportunities.

The Islamorada Foundation

Introduction

The fragility and resilience of Islamorada have been dramatic over the past year as evidenced by Hurricane Irma, which made landfall on September 10, 2018. On September 12, Islamorada Mayor Jim Mooney said the hurricane had been “devastating.” Island resorts “took a tremendous amount of water,” he said, and the northbound lane of US 1 was washed away.

“The time to preserve anything is while it is still plentiful.”

John C. Gifford (1879-1949),
often called South Florida’s great interpreter

Seven months later, the pain of Irma remained front and center in a focus group with Islamorada parents who talked about the impact of the hurricane on their children and families. “The evacuation was a terrible experience for us,” one said. “We were running out of gas, no gas stations had gas and the road was a parking lot.” “We returned to nothing,” another said. “We got out of our cars with our kids and there was nothing left, nothing to save.”

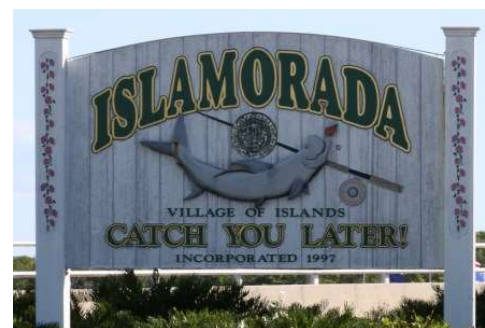
But everyone also spoke about how their neighbors, businesses, fire department, police and others rallied to hold their arms around victims and the community while they mobilized and launched a clean-up and recovery that was inspiring to all. “My kids learned the real meaning of giving, of philanthropy,” one said. “To this day, our kids look for ways to share what they have to help others. It was the big silver-lining to Irma. It brought the community together and we are coming back Islamorada strong.”

It is with this historical event and context that we shape this strategy.

Much needs to be done to protect and preserve our fragile network of islands. Just as the hurricane mobilized everyone in a heroic way to protect and restore lives and property, so must we mobilize to ensure wise development, protect open space and create access to our lands and waters for people of all ages, needs and abilities. The success of the Foundation, a grass-roots, community-driven nonprofit, is dependent upon sound leadership, vision and partnerships with residents, visitors, businesses, nonprofits and governments at all levels. There is a place for everyone to protect and be good stewards of the islands that make up the Village of Islamorada.

The Place

Islamorada is in Monroe County, Florida and has a population of about 6,200 residents. The Village was incorporated in 1997 and consists of four islands – Plantation Key, Windley Key, Upper Matecumbe Key and Lower Matecumbe Key. Of the 106-mile Florida Keys chain of islands, the Village of Islamorada consists of 19 miles. Traveling northeast from Key West (MM 0), Islamorada begins at Mile Marker 72 and ends at Mile Marker 91. The primary industry is tourism, with many seeking the thrill of sport fishing while others visit for kayaking, biking, diving/snorkeling, the arts, dining and exploring nature.



Islamorada is located on the southern edge of Everglades National Park (Florida Bay), 80 miles from the heart of Miami and 3 miles from the only living coral reef system in North America.

“As the Marion neared the inland called Indian Key, which is on the eastern coast of the peninsula of Florida, my heart swelled with uncontrollable delight. Our vessel once over the coral reef that everywhere stretches along the shore like a great wall, reared by an army of giants, we found ourselves in safe anchoring ground, within a few furlongs of the land. The next moment saw the oars of a boat propelling us towards the shore, and in brief time we stand on the desired beach. With what delightful feelings did we gaze on the objects around us – the gorgeous flower5s, the singular and beautiful plants, the luxuriant trees. The balmy air which we breathed filled us with animation, so pure and salubrious did it seem to be.”

John James Audubon, April 25, 1832

Islamorada’s marine environment supports over 6,000 plants, fishes and invertebrates. From coastal mangroves to patch and platform reefs, from the shallow water of Florida Bay to the open water of the ocean, each interdependent habitat plays a vital role in this estuary. In 1990, the Florida Keys became designated as a National Marine Sanctuary. Prior to that, in 1960, to address the demise of the coral reefs in the Keys, John Pennkamp Coral Reef was established as the world’s first underwater park. Continued degradation of the reef prompted the designation of the Key Largo National Marine Sanctuary in 1975 and Looe Key National Sanctuary in 1981. During the 1980s, oil drilling proposals, reports of deteriorating water quality and declines in the health of the coral reef led to President George Bush signing the law that created the National Marine Sanctuary. Today, the Sanctuary protects 2,900 square miles of water.



Islamorada is a place of historic significance and intrigue. It includes the islands that held two villages of the Caloosa Indians that were long ago destroyed on Lower and Upper Matecumbe islands. The Caloosa Indians had a \$200 per head bounty placed on them by salvage expert Jacob Houseman, who was burned out by the Caloosa’s in 1840. Islamorada was a thoroughfare for fleets of pirate ships holding Spanish treasures carried to Europe, usually wealth stolen from the Aztecs and Incas. Pirates violently left their mark of terror in the Islamorada area for over 300 years. In the late 1800s, “The Wreckers” saved lives and sailing vessels from the perilous reef while making a living from the boats they salvaged. Fishermen, farmers and rail men followed. Indian Key, a State Historic Site, was home to Central Supply, the construction headquarters for the railroad men building the rail extension in the Keys. The survey for the railroad began in 1902 and the first train reached Key West in 1912. More than 500 workers died on the job. The hurricane of 1935 washed out miles of track from Plantation Key south and the rail ceased operations. To the south, Islamorada begins on Lower Matecumbe on Hawk Channel. There are coral gardens a mile offshore.



Freshwater catchment basins were located near the northeast corner of the island that were used by Indians, explorers, pirates and fishermen until they were filled in by railroad workers. A long waterfront along US 1 on the ocean side is municipally owned and is used by wading anglers searching for anything from bonefish to sharks. Upper Matecumbe holds the majority of Islamorada’s commercial interests, including renowned 5-Star resorts and marinas, clothing and outdoor recreation retailers, diverse restaurants, and a new Publix Supermarket

and West Marine store. The name first given to Upper Matecumbe was Islamorada, derived from the Spanish words for purple isle. Windley Key provided quarry stone for the rail line, establishing a rock pit known as the Windley Key Quarry. The excavation filled with water is now known as the Theatre of the Sea. Plantation Key is home to the K-12 Plantation Key Schools district. It is connected by draw-bridge with Windley Key. A large mound was built on the island by Native Americans with artifacts dating to A.D. 500-700. The mound was leveled in 1958 to allow a real estate subdivision. Original settlers raised coconuts and pineapples. An early settlement on the ocean side of the island was known as Pear City for a large conch pearl found by John Lowe.

Mission and Vision

The Islamorada Foundation was founded in 2010 as a charitable nonprofit tax-exempt organization under Section 501 (c) (3) of the Federal Internal Revenue Code.

Our **mission** is to:

Provide the means, motivation and leadership to enhance, conserve and preserve open space in the Village of Islamorada to support our quality of life and economic well/being.

Our **vision** is:

Islamorada achieves a balance between economic and community development and protection of the ecosystem and open space. Residents and visitors demonstrate stewardship through philanthropy and giving time, talent and treasures.

The Foundation achieves its mission by acquiring and managing open space in Islamorada with the support of its hands-on Board of Directors and through volunteers who are vested with the future of the community.

Guiding Values

Our values also serve as filters for decision making. We believe that:

- **Preserving open space** is good for everyone.
- **Stewardship** of all lands, public or private, is essential to well-being and how we will be perceived and respected as a community.
- **Protecting and preserving habitat** for critical species that are threatened or endangered is essential.
- We are as much about economic and community development as we are about conservation and resource protection and we strive to achieve a **balance** between what is best for Islamorada in the long-term.
- We support **low-impact, passive recreation and universal access** where open space development is a priority.

Goals and Objectives

Acquisition Goal:

To acquire/manage open spaces in keeping with our mission, vision and values.

Objectives:

- Acquire at least one property annually.
- Build capacity to be a “Land Steward.” Have a staff Land Steward by 2020.

Organizational Development Goal:

To expand the Foundation Board of Directors to achieve diversity and implement systems and training to strengthen capacity.

Objectives:

- Between 2018 and 2020 the Foundation will continue to strengthen governance with new Board members with skills related to this strategy.
- In 2018 we will establish a Committee structure to achieve the mission and goals.
- Beginning in 2018, Board members will participate in Board development programs to increase the capacity of members.

Philanthropy Development Goal:

To develop philanthropy as a primary driver for land acquisition and conservation easements and for property stewardship.

Objectives:

- At the end of 2018, begin a Foundation newsletter to be issued 2 times per year.
- Continue the annual meeting of the Foundation to celebrate Islamorada.
- Through Board assignments, develop methods for approaching philanthropy to support each acquisition and site management.

Partnership Goal:

To develop working partnerships with municipal units of government and nonprofits that are aligned with the Foundation’s mission and vision.

Objectives:

- Seek grant funds with consultative support to achieve goals.
- Develop partnerships with Foundations that have complimentary goals.
- Explore opportunities for service sharing that are “win-win” with units of government and nonprofits, beginning in 2018.

Governance

Our Board of Directors includes:



J.C. Mikula – Chair

Co-owner of Backcountry Cowboy Outfitters, an Islamorada outdoor retail store, J.C. dedicated 4 years serving on the Village of Islamorada Near Shore Water Citizens Advisory Committee and currently serves as a representative on the Village of Islamorada Parks and Recreation Citizens Advisory Committee. He served his country in the U.S. Air Force and managed two Home Depots before moving to Islamorada.

“I’m excited to serve on the Board of The Islamorada Foundation, to channel my energy and help bring positive change to Islamorada in community areas that have great potential.”



Kristi Holman – Vice-Chair

Co-owner of Backcountry Cowboy Outfitters, an Islamorada outdoor retail store. She is a resident and business owner in Islamorada.

“I am delighted to be involved with Foundation because Islamorada is my home. I want to protect the natural beauty and character of our community for future generations.”



David Osborn – Secretary

As a graduate with an architecture degree from Auburn University, David was excited to join the family home construction business in Islamorada in 1992. He assumed ownership of the business in 2018.

“I think you have to treat the Islamorada community like a family. This island is unique not only because of how beautiful the environment is, but also because of the people. I hope that with my architectural background, and the help of the Islamorada Foundation, we can continue to improve the quality of life here in Islamorada.”



Chris Frank – Member

General Manager of the Green Turtle and Kaiyo restaurants in Islamorada, both owned by Rich Products Corporation, a privately held, multinational food products corporation headquartered in Buffalo, New York. Chris has a long history in the food service industry, including a management stint with Wegman’s, an upscale supermarket chain. He also donates his time to serve as coach in a local K-12 school. As the newest Board member, Chris brings a wealth of business and organizational skills to the Foundation Board.

“This is my community. I want to participate and give back, and the Foundation is a perfect way to achieve both goals.”



Andre Hopman – Member

Born and raised in the Keys, André has bachelor’s degrees in English Literature and History from Florida International University. He developed a passion for construction while building his first home in Islamorada when he was 22.

“As a builder, I understand that there is more to making a home desirable than just beautiful details and waterfront views. It’s the neighborhood, the people and the community that surround it. The Islamorada Foundation’s mission to enhance the parks and greenspace in our community is a vital component in preserving the quality of life. I am excited about Islamorada’s future if we all pull together.”



Steve Leopold – Member

A full-time offshore Charter Boat Captain, Steve has lived in Islamorada since 1988. Fishing, diving and tropical plants are his “fun.” His wife, Leslie, a local realtor and daughters Annie and Ellie share his love of Islamorada. Steve’s service to this community includes 9 years as President of the Islamorada Charter Boat Association and 6 years as member of both Village of Islamorada Near Shore Water Citizens Advisory committee and Village of Islamorada Parks and Recreation committee. Steve currently, and for the past seven years, has represented the Sport Fishing industry with a seat on the Florida Keys National Marine Sanctuary Advisory Council as representative of the Sport Fishing Industry.

“With my experience and passion for this island community, I look forward to being involved with The Islamorada Foundation.”



Cheri Tindall – Member

Cheri been a Florida real estate broker for over 32 years. Her extensive knowledge of the Florida Keys real estate market, local properties and zoning laws have been a tremendous asset in helping her clients find the perfect home. In 2005, she expertly marketed and sold a local resort and marina for a record \$30 million. Cheri's past clients appreciate her honesty, integrity and respectfulness in how she navigates the intricacies of each real estate deal. Formerly from Colorado, Cheri and her husband fell in love with the Florida Keys while on vacation from the snow and cold and have since resided in Islamorada. Their passion for skiing was replaced by their love of the waters in the Florida Keys. Cheri has been a leader in starting and organizing fly fishing tournaments for women and serving on the boards of many tournaments, including the Women's World Invitation Tarpon Tournament. In her free time, you will find her out on the water.

Southwind Park – Building Stewardship Capacity

Beginning in November 2012, the Foundation gained experience as a steward of open space when it took over management of a 1.1-acre park owned by the Village of Islamorada and purchased by the Village with a State Trust Fund grant. The 5-year agreement between the Village and Foundation was recently renewed. The Foundation has been responsible for managing the property on US 1 on Upper Matecumbe Key as a usable and downtown park. Under Foundation management, the park has been used as a Farmers Market and for the Foundation’s annual celebratory event. A small pavilion has been created with park benches, trash and recycling receptacles, parking, bike racks and enhanced natural landscaping.



What is Open Space and Why Protect it?

Open space are places of public value, including land that offers important opportunities for green space, non-motorized paths and access to recreation and other amenities.



Open space includes:

- **Natural green spaces**, including wooded areas, rocky areas, wetlands and shorelines
- **Parks and gardens**
- **Informal recreation space and green areas** around housing and buildings
- **Play areas** for children
- Hard surface areas for **pedestrians or bikers and civic spaces** like market squares
- Opportunities to demonstrate and **prevent pollution** like run-off to ocean and estuary waters.

Protected and well-managed open space will serve up to seven purposes in Islamorada through the efforts of the Islamorada Foundation:

1. **Strategic Purposes:** defining and separating areas, providing greenways or landscape buffers, serving recreational needs and making the area economically more desirable by supporting both quality of life and economic well-being.
2. **Quality:** providing visually attractive green spaces where people live and visit.
3. **Density/Diversity:** providing a balance of developed and undeveloped space that creates diversity, green space, passive recreation, play areas and other environments to enrich and benefit the community.
4. **Health & Well-Being:** opportunities for people of all ages and needs to informally recreate, walk, cycle, observe and learn about nature and more.
5. **Habitat:** supporting biodiversity and protecting habitat – from reef to woods – for native plants and animals, while removing or controlling invasive species of plant life.
6. **Community:** creating places to congregate and hold community events.
7. **Visual amenity:** preserving places for people to connect with nature and enjoy the natural environment of extraordinary places in Islamorada.

Open public space in Islamorada currently includes:

- Founders Park
- Southwind Park
- Library Park Beach
- Hurricane Monument
- Anne’s Beach
- Key Tree Cactus Nature Preserve
- Plantation Tropical Preserve
- Green Turtle Hammock Nature Preserve
- Harry Harris Park/Launch
- Plantation Hammock Preserve
- Windley Key Fossil Reef Geological State Park
- Lignumvitae Key State Botanical Park
- Indian Key Historic State Park



Areas of Strategic Focus

The Foundation's strategy has four areas of focus with goals and steps for each:

1. Open space acquisition, conservation easements and land stewardship
2. Foundation development and sustainability
3. Development of philanthropy
4. Resource development and partnerships



Open Space Acquisition, Conservation Easements and Land Stewardship

Goal: To acquire and manage open spaces in keeping with our mission, vision and values.

Objective: Acquire at least one property annually.

We have identified seven properties as priorities for acquisition. This will be an ongoing process as we become aware of opportunities. The due diligence process will differ with each property depending upon ownership, legal, market, location and other conditions. A property owner or other interest may notify the Foundation at any time of a potential acquisition. Assuming it is in keeping with the Foundation's mission, vision and values, the Foundation will be interested in understanding the potential opportunity subject to an intense due diligence process.

While we cannot divulge the specific location or other information about current properties identified as acquisition priorities, we can provide specifics under a confidentiality agreement with individuals or entities that are interested in providing charitable donations for open space acquisitions in Islamorada. The five properties include some or all of the following features:

- Frontage on US 1.
- Invasive plant species that should be eradicated/managed.
- Are obviously or seemingly open for acquisition negotiations.
- Offer green space, passive recreation and other opportunities, including botanical gardens, wayfinding, non-motorized transportation and others.
- Access to water
- Range in size from less than 1 acre to several acres.
- Have no present development or properties with residential and/or commercial development.
- Opportunities to reduce density through acquisition of development rights.
- Appear to range in acquisition price, subject to negotiation, from approximately \$400,000 to \$2,000,000.

Objective: Build capacity to be a "Land Steward." Have a staff Land Steward by 2020 at the latest.

In 2018, we will develop a systematic program for volunteerism and volunteer development as a primary means of land stewardship. We will acquire software to support this effort. A Board member will become our primary leader for stewardship.

By 2020, we will develop financial resources to support a "Land Steward" position to ensure effective management and appropriate development of open space acquired or otherwise managed by or through the Foundation. This individual will oversee development of sites consistent with site plans and enforcement of site use, in partnership with others, including enforcement agencies. The Land Steward will also assist with communications and training of volunteers.

Foundation Development and Sustainability

The Foundation recognizes the importance of Board diversity, development and structure to ensure the Foundation achieves its mission.

Goal: To expand the Foundation Board beginning in 2018 to achieve diversity and implement systems and training to strengthen the capacity of the organization.

Objectives:

- **Board Expansion:** Between 2018 and 2020 the Foundation will add up to nine additional Board members, increasing the size of the Board to 15. Individuals identified as potential future Board members include lawyers, bankers, accountants, business owners and philanthropists.
- **Board Structure & Functions:** Beginning in 2018, the Board will establish a Committee structure, which is strategically important to achieving the mission and goals. Those committees will include:
 - Executive Committee that may act in the absence of full Board meetings.
 - Development Committee that will recommend officers, screen and recommend new Board members and recommend the content of Board development programming.
 - Fund Development Committee to oversee events, fund raising strategies and stakeholder outreach and consideration of options for fund management and potential creation of endowment.
 - Finance Committee to oversee development of annual budget, establish finance policies and guidelines, oversee investment management and recommend a CPA and/or auditor.
 - Ad-Hoc Committees, established as needed for special circumstances.
- **Board Development:** All Board members will participate in Board development programs to increase the capacity of members to serve the organization. For example, in 2018, Board members will participate in training programs covering:
 - Requirements of a 501(c)(3) charitable organization.
 - Roles and responsibilities of a nonprofit Board of Directors.
 - Fund raising and development.



Development of Philanthropy to Support Land Protection and Stewardship

Goal: To develop philanthropy as a primary driver for land acquisition and conservation easements and for property stewardship.

Objectives:

- **Communication:** At the end of 2018, begin a Foundation newsletter to be issued twice yearly to update current and future stakeholders on status, plans and accomplishments and to encourage philanthropy.
- **Annual Meeting:** Continue in 2019 the annual meeting of the Foundation to celebrate Islamorada and the individuals and organizations supporting the Foundation's mission and vision involving open space.
- **Philanthropy:** Through Board assignments, develop methods for approaching philanthropy to support each acquisition or conservation easements and the broader need for site management and control and volunteer training (2018 and forward).

Resource Development and Partnerships

Goal: To develop working partnerships with municipal units of government and nonprofits that are aligned with the Foundation's mission and vision.

Objectives:

- **Grant Funding:** Beginning in 2018, seek grant funds with consultative support to further the acquisition and development goals of the Foundation.
- **Partnerships:** Identify and seek to develop partnerships with Foundations that have complimentary goals and objectives to develop financial resources to meet goals and objectives.
- **Service Sharing:** Explore opportunities for service sharing that are “win-win” with units of government and nonprofits beginning in 2018.
- **Online Giving:** By 2019, include on-giving as an option for those with charitable intent.

