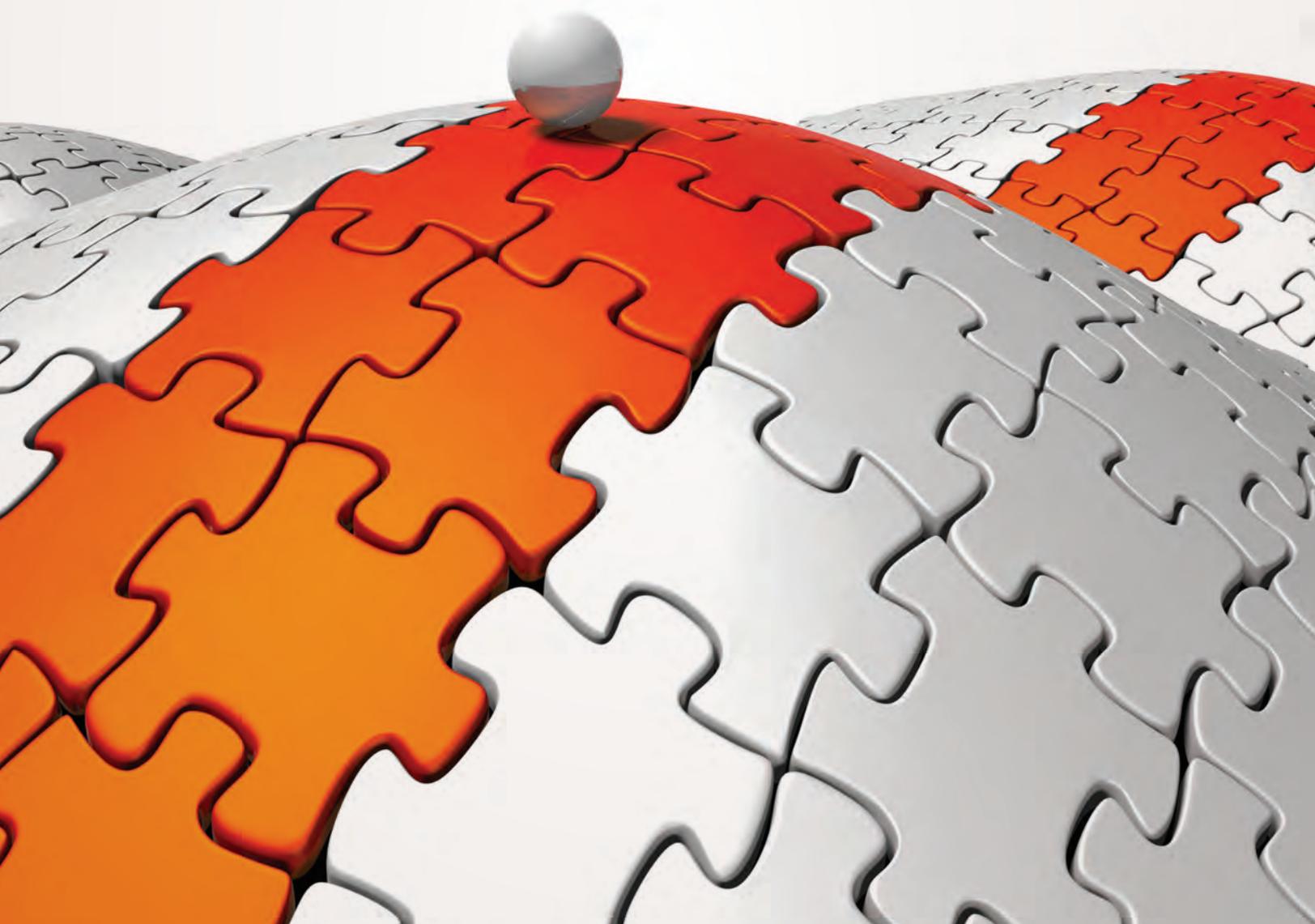


DURABLE COLLABORATIONS

PART II: PATHS TO IMPLEMENTATION

BY DALE BONAR AND JIM MORRIS



IN THE SPRING 2013 ISSUE OF *SAVING LAND* we discussed the spectrum of collaborative options available to land trusts to enhance the sustainability and permanence of quality conservation work. In this second part we review the recommended implementation steps to various collaboration options and provide examples of the paths and resulting experiences of land trusts that have entered into durable collaborations.

Showing the way

In 1986, six land trusts on Cape Cod took a leap of faith together: With pooled funds, they launched the Compact of Cape Cod Conservation Trusts to advance their missions. It was a savvy, innovative move—the first of its kind in the land trust community. And it broke trail for other collaborative solutions to follow.

The need for effective collaboration within the conservation world has never been greater, as land trusts look for ways to expand their capabilities and capacity. Many smaller land trusts, struggling to go it alone, have difficulty securing the resources they need, particularly as growth in the number of land trusts has increased competition. Foundations, too, are pushing nonprofits to be more effective and to work together more closely.

Collaborative solutions to these challenges cover a range of possibilities. Consider these examples:

Shared Staffing. In 2001, with the help of The Nature Conservancy and Maine Coast Heritage Trust, the Mt. Agamenticus to the Sea Conservation Initiative, a 10-member coalition, hired a part-time land protection specialist. Over the years, the coalition has shared a development director, office assistant and project coordinator.

Cooperation on Special Initiatives. In 2012, the Lancaster Farmland Trust and the Lancaster County Conservancy joined forces to implement complementary grants totaling \$330,000 to promote strategic land conservation in the Pennsylvania Highlands region.

Co-Holding Easements. The practice of co-holding easements has grown dramatically over the years. Often the larger land trust plays the initial role and the local land trust maintains the contact with landowners. Quasi-governmental land trusts like the Jefferson County Farmland Protection Board and the Maryland Environmental Trust rely on local land trust partners as co-holders, often with the land trusts carrying out the annual monitoring duties but then working with the agencies if enforcement actions are necessary.

Coalitions. After the Compact of Cape Cod Conservation Trusts set the stage (now 23 members strong), many

other coalitions formed over the years. In 1994, Gathering Waters Conservancy was created by a core of land trust leaders to serve as an educational and technical assistance clearinghouse for Wisconsin land trusts. The Partnership of Rangeland Trusts is another outstanding example of coalitions designed to leverage resources. Together, PORT's members have conserved more than 1.7 million acres of working rangeland throughout California, Colorado, Kansas, Montana, Oregon, Texas and Wyoming. More recently, Oregon land trusts took the lead in creating the Coalition of Oregon Land Trusts to strengthen the land trust community in the state through public policies, programs and communications supporting land conservation.

The Blufflands Alliance, a group of six Wisconsin, Minnesota, Illinois and Iowa land trusts, joined forces to protect a landscape in the upper Mississippi. The alliance secured 17 years of funding shared among the groups (including operational support for each of the collaborating land trusts) to do the work. They also adopted a shared leadership model that has worked extremely well. Not a 501(c)(3) or subsidiary entity, the alliance is a quasi-formal collaboration with written operating principles.

Mergers. Two examples from the Pacific Coast illustrate the power of aggregating strengths. In 2010 the Three Rivers Land Conservancy combined with the Columbia Land Trust to create an organization with more than 1,800 members in northwest Oregon and southwest Washington. The organization has conserved more than 18,000 acres from the east side of the Cascade Mountains to the Pacific Ocean in the two states.

In early 2009 the seven local land trusts in Hawaii began a series of meetings, along with The Trust for Public Land, The Nature Conservancy and state agency land and cultural representatives to discuss how to more effectively collaborate to preserve “special places” in Hawaii. Four of the land trusts, whose service areas included all of the state's counties, decided in early 2010 that merger was a good option. The three other active

land trusts decided it was not yet time for them, but remained involved in the collaborative efforts, with the option to join in the merger at a later time if they wished. The resulting Hawaiian Islands Land Trust, formed in January 2011, serves the entire state and still works closely with the other land trusts and allied conservation groups, collaborating on projects and providing professional guidance as requested.

What to bring on your trip

Successful collaborations such as these are built on a platform of critical elements that every successful, sustainable organization should have in its pack:

- Clear vision
- Thoughtful planning
- Mutual respect and trust
- Adequate financial resources
- Committed partners and leadership
- Clearly articulated roles and responsibilities
- Sound communications
- Complementary organizational cultures

With these basic ingredients in place, organizations considering collaborative approaches need to be prepared to answer the following questions:

- How big is “local”? How can local accountability be maintained, as groups and their service regions expand in size?
- When multiple organizations protect land in the same geographic region, how can groups overcome issues of turf and ego?
- What opportunities exist for shared services in places where organizations overlap?
- In which cases will long-term investment in partnerships provide better results than an intensive push toward merger?

These are important questions to explore as you get into the collaborative mode with your fellow travelers.

The path to successful collaboration

You can think of the pathway to implementing a successful collaboration as a map, but don't be surprised if the way is not linear.

As organizations make their way down the path, they must be prepared for the unplanned turn along the way.

Defining your need for collaboration.

Collaborations of any type will draw on your resources, whether people, money or time. Since most land trusts are already operating at or above capacity, carefully weigh both the costs and benefits of any collaboration. Your goal should be increasing organizational capacity. Ideally, this can be part of your periodic strategic planning or annual review sessions, which determine what your goals are and how best to meet them. Honestly assess your capacity and expectations before pursuing formal collaborations.

Exploring the options for collaboration with potential partners.

Once you've identified the type of collaboration you desire, carefully evaluate prospective partners. Does their mission fit with your needs? Can they provide the help or services that you need? Do they have a reputation for producing what they say they will? Do they have a track record of successful collaboration? Will the constituencies of the participating organizations be supportive of the collaboration? It's best to examine these questions before you begin discussions with other organizations; you'll need to answer them to your satisfaction before choosing partners and committing. Keep them in mind as you progress through the next steps.

Getting to know each other. Organizational culture is based in good part on board and staff personalities. Before entering into any level of collaboration, it is important to understand and accept cultural differences. The free-wheeling management style of Laid-Back Land Trust may make it very challenging to work with the more formal Buttoned-Down Land Conservancy. Just as dating provides individuals the time to get to know each other and decide if they can live



THE COMPACT OF CAPE COD CONSERVATION TRUSTS, INC.

The Brewster Conservation Trust, the Town of Brewster and the Massachusetts Executive Office of Energy and Environmental Affairs protected this 3.8-acre parcel. The land trust is a member of the highly successful Compact of Cape Cod Conservation Trusts.

comfortably with each other's personalities, pre-collaboration familiarity will minimize problems down the line. Spending time together through regional meetings, shared training sessions and volunteer community activities provides opportunities to build a level of comfort in working together.

Building trust and sharing internal information. Getting from “them and us” to “we” is a matter of increasing familiarity that leads to trust. This is especially important for the higher-risk collaborations, such as collaborative fundraising or staff sharing, and especially for groups considering mergers. Confidentiality agreements during this mutual discovery can be an effective way to reassure the potential participants that any internal organizational information revealed about each other will not be shared without prior agreement. Helen Nielsen, president of the Maui Coastal Land Trust and then of the new Hawaiian Islands Land Trust noted that walking each other's lands “allowed the different boards and staff members to get to know each other better and build the trust that was so important for a successful merger. The field trips were especially important in that we all saw firsthand everyone's commitment to the lands and were able to set aside any egos.”

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In any formal collaboration, others' actions can reflect on your organization; you should understand the range of those potential actions. If your partner were to accept financial support from a business held in low regard by your community or constituency, or if they had other liabilities, such as poorly managed preserves or easements, would that reflect badly on your organization as well? The more you know about each other the better prepared you will be to make the right decision about a

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partnership and prepare an effective agreement. When possible, schedule gatherings on each other's protected lands as a very effective way of understanding each other and building trust.

Saying what you mean, clearly. Clear and regular communication is critical for groups considering and implementing collaborative ventures. Boards need to be fully aware of the arrangement they will be approving, and staff members need to know how their duties and responsibilities might be affected. Engaging them during the exploration process allows time to address concerns in a timely manner, rather than face last-minute resistance. When higher-risk collaborations, such as mergers, are under consideration, clear lines of communication between each organization's board and staff contribute to building understanding and trust. Bringing

critical stakeholders, such as major donors, into the communications loop will also prepare you to answer constituency concerns when you go public with the venture.

Drawing on experiences of the land trust community. Yours is unlikely to be the first of its kind. It is well worth the time to seek the advice and experience of other organizations who have undertaken similar collaborations. Land Trust Alliance regional staff, the online Learning Center



and regional land trust associations may provide resources and contacts for you. (See www.landtrustalliance.org.)

Drafting written agreements for expectations and responsibilities. Having decided to work together, your organization and its partner(s) should make sure that your commitments to and expectations of one another are clearly spelled out. It's uncomfortable, to say the least, to discover six months into a joint project that what you thought you'd committed to is different from what your collaborative partner was expecting.

Creating a consensual plan for the collaboration. The deeper the collaboration, the stronger the need for a guiding document for your joint efforts. This could be a strategic plan or joint program plan, or something less formal. Whatever level of formality you deem appropriate, you should develop this guide together, identifying the outcomes you hope to achieve, the approaches you'll take and how you'll measure success.

With a range of collaborative options to explore, land trusts of all sizes and capacities should be able to tailor a solution that fits their needs. Good luck on your journey. 🍌

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