

Durable Collaborations: Strengthening Land Conservation through Lasting Partnerships

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Source: Saving Land magazine, Spring 2013 [Durable Collaborations: Strengthening Land Conservation through Lasting Partnerships | Land Trust Alliance](#) **Author:** Dale Bonar and Jim Morris

Durable collaborations are robust, mutually beneficial and long-lived approaches to achieving conservation success that enable groups to leverage their combined efforts. They also offer solutions that can benefit land trusts by making them stronger organizations with the potential to save more land and have a bigger conservation impact. They help to meet the perpetuity challenge.

The Obligation of Perpetuity

No other class of nonprofit organizations bears the equivalent burden of perpetual stewardship that land trusts are required by law to perform. Most land trusts are small organizations; in fact, 57% of land trusts are all-volunteer, and the challenge of securing the necessary financial and human resources necessary to run a professional conservation operation can be difficult. These organizations are often stretched thin, needing additional volunteers or staff to handle the permanent stewardship obligations they have already undertaken, as well as additional capacity to grow their land protection programs.

The greater conservation community is rightly concerned about the potential ramifications of individual land trust failures. If one group fails, nearby land trusts may need to assume that group's stewardship duties — a burden that can place the receiving organization in a perilous position without the requisite financial resources.

If there is no organization capable of stepping up to the plate, the failure of a land trust may lead to “orphaned” easements and eventually the loss of protections on those properties. In domino fashion, these events could lead to loss of public confidence in the land trust model. In the face of these challenges, the question is how to keep the best of local conservation while ensuring conservation quality and conservation permanence.

An Emerging Need for Collaboration

Because land trusts are focused on perpetual stewardship, they must be especially mindful of the need for organizational sustainability, particularly for smaller groups hardest hit by the economic downturn. Durable collaborations are one of the most important responses to the sustainability challenge. Collaborations occur along a continuum that runs from informal networking and project sharing all the way to more structural integration, including shared staffing or even merger.

In addition to helping leverage limited organizational resources, collaborations provide the opportunity for synergy and specialization, helping to eliminate redundancy in the different organizations by allowing land trust personnel to specialize in their areas of expertise, rather than people at each organization having to be “jacks of all trades.” For example, sharing of back-office staff (reception, secretarial, bookkeeping and such) or stewardship and management duties can free up staff and volunteers to work on fundraising or proactive land acquisition strategies. And perhaps most important, it results in the integration of local conservation into regional conservation efforts, increasing the reach of conservation.

Considering Collaboration

The greatest regional conservation impacts come when geographically related organizations are constantly learning from each other, sharing experiences and understanding their communal needs, opportunities and challenges. Open discussions about the range of potential collaborative endeavors, even if not immediately implemented, can prepare groups if or when the time comes to proceed with a collaboration or merger.

One impetus for considering collaboration comes from the increasing numbers of funders who feel that grants to collaborative efforts, rather than smaller grants to a number of groups with similar missions, provide a greater societal return on their investments because of the synergy that can come from such efforts.

Strategic planning is an excellent time for examining the opportunities and benefits that can result from collaborative efforts and provides an organization wide forum for careful consideration. It is also an opportunity to learn about the projects of other conservation organizations in your region and familiarize yourselves with their current visions, goals and aspirations.

Examining potential collaborative ventures during strategic planning is also a good precautionary step because the impetus for considering collaborative partnerships with other organizations possessing overlapping missions can be the result of a triggering event, such as loss of crucial personnel, diminished core funding or lack of capacity to respond to conservation opportunities. Depending on the degree of crisis presented by the triggering event, it may or may not be possible to take a long, careful and deliberate look at the best collaborative opportunities at that time.

Spectrum of Collaboration

The range of potential collaborative ventures is broad and there is no “one-size-fits-all” choice. Location, mission, organizational culture, financial resources, expertise and leadership all influence which path to choose. In general terms, the various opportunities increase in complexity from cooperation to coordination to integration to full organizational merger. The inherent risks and responsibilities for the partnering organizations also increase with more complex collaborations. Beginning with lower-risk collaborations can increase interorganizational understanding and build trust, as well as raise comfort levels to pursue appropriate higher-risk ventures, such as shared staffing or even merger.

Networking is a simple, low-risk way of opening the door for local organizations to learn more about their regional neighbors. The key ingredient of successful and durable collaboration is personal relationships. In the simplest form, this could mean quarterly Sunday afternoon gatherings on different conserved properties to share appreciation for conservation, as well as to understand each other’s organizational culture and conservation visions. Having a member of another land trust serve on your board also increases interorganizational knowledge, trust and understanding.

Shared Trainings are a cost-effective way of gaining professional expertise while getting to know your neighbors. Land trusts that may not have the resources to send staff or board members to regional or national Land Trust Alliance trainings or conferences could pool their limited funds to bring in expert trainers for everyone’s benefit. Preparing for accreditation is a particularly important example of where a group of land trusts could benefit from a collective training. More general sessions, such as board development or fundraising planning, could also involve other non-land conservation partners to help spread the costs.

Joint Programs are a more formal step along the collaboration continuum and could include any variety of activities, ranging from environmental education and legislative advocacy to regional land conservation planning and mutual participation in land conservation projects. Joint programs allow each organization to focus on an area of specialty while benefitting from the resulting product. The Trust for Public Land, for example, often works in conjunction with local land trusts, providing expertise in fundraising and acquisition of important conservation lands for which the local land trust assumes ownership, management or stewardship responsibilities.

Regional Associations that have formed throughout the country in the past two decades often provide or facilitate many of the collaborative opportunities described in this article. Such associations often include a variety of non-land trust conservation organizations whose missions dovetail with the conservation efforts, but may focus specifically on

such areas as environmental education, environmental advocacy or habitat restoration for endangered species, for example.

Shared Back-Office Services or Shared Staff Members can be a very effective way of gaining professional services at a bargain price. Many of the day-to-day operations of nonprofit organizations, such as bookkeeping, human resources, database management or IT services, may require only a few hours a week. Two or more organizations with similar needs can work together through “shared services agreements” to support full-time professional help. Larger organizations with existing staff may effectively subcontract a portion of the staff member’s time to smaller organizations with limited needs, or two organizations could split the cost of a shared staff member position. That staff member could be housed in either organization or might split his or her time between the two organizations, depending on locations and convenience.

Merger is an increasingly attractive option in the nonprofit world, but as the most complex option, it should not be approached without very careful consideration and planning. Organizations that have worked together in some manner, whether on joint projects or staff sharing, are typically in a much better position to address the many critical issues that must be examined for a successful merger. When the trigger for considering merger is a crisis event of some type, the pressure to move quickly may not provide the opportunity to perform the careful due diligence that helps ensure success.

Evaluating Collaboration Needs

Whatever the reason for considering collaboration options, the process of evaluating the best path for your land trust has the same elements: exploring what it will require of your organization and balancing that against the potential advantages of the various collaborative options. The more thoughtful and thorough that evaluation, the greater the likelihood you will make the best decision, especially if the collaboration brings significant financial investment. This evaluation should include:

- A realistic self-assessment of your organization’s needs and capacity (see the Land Trust Alliance’s *Assessing Your Organization*);
- An understanding of the missions, organizational cultures and capacity of potential collaborative partners;
- An assessment of human and financial resources needed and available for the collaboration, including outside funding;
- Communication with core supporters and community stakeholders to assess their response to the proposed collaborative efforts; and
- Ensuring there are champions of the collaboration and trusted leadership in the collaborating organizations.

Primary Challenges to Durable Collaborations

Failure to implement or sustain collaborations typically occurs when the participants have not adequately evaluated the costs and benefits of the collaborative effort or have not clearly articulated the roles and responsibilities of each organization. The main hurdles to developing acceptable plans typically result from:

- Lack of familiarity with the other organization(s) and insufficiently developed mutual trust;
- Substantially different organizational “cultures” of the different groups;
- Uncertainty by board and/or staff about their future duties, particularly if the higher-risk collaborations, such as staff sharing or mergers, are contemplated;
- Strong egos unwilling to accept a sharing of duties or decision-making; and
- Concerns that work on local conservation projects could be overshadowed by regional projects.

Durable Collaborations: Paths to Implementation

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Source: Saving Land magazine, Summer 2013 [Durable Collaborations: Paths to Implementation | Land Trust Alliance](#) **Author:** 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

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 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."

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 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 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.

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.