

Collaborative Opportunities for Land Trusts



Many types of collaborative approaches are available to help advance land conservation.

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Introduction

Collaborative efforts can maximize the collective resources available to land trusts, allowing organizations to operate more efficiently and increase and improve their work. Collaboration can enable land trusts to save time and money by not re-inventing the wheel and can mean success for a project that otherwise may never have gotten off the ground.

Partnerships are not without challenges as every organization has its own priorities and methods of operating. Each collaborative project is unique and requires careful coordination. But the collaborative process also offers tremendous opportunities for organizations to learn from one another and become stronger.

Working collaboratively is becoming more the norm in the land trust community as organizations recognize the value and strength of partnerships. In an ever-challenging climate where funding is more competitive and land transactions are more complex, land trusts are finding that collaborating with local, region-

al, statewide or even national organizations is often the solution to completing a project successfully.

Benefits of Collaboration

The benefits of collaboration depend upon the nature of the collaboration and the collaborators but can include:

Decreased Costs – Partners can avoid duplicate purchases of goods or services. They can achieve economies of scale by coordinating their purchases of goods and services. They can also avoid the costs associated with unnecessary competition (e.g., competition for grants).

Increased Land Conservation – Collaborative efforts that lead to more efficient use of resources can result in cost savings, which can be applied to achieving more conservation. Collaborative efforts can make it more feasible to strategically protect large landscapes by pooling expertise and resources and sharing the work. Especially on the landscape scale, land conservation cannot be done without the support of multiple partners.

Expanded Funding Opportunities – When new partners are brought to the table to complete a project, they bring with them potential donors and funding sources. These are often new sources of funding that otherwise would not have been tapped for the project. In addition, public and private funding sources often give higher priority to projects with multiple partners, sometimes even requiring collaboration.

Shared Expertise – Land trusts can share expertise gained from experience, especially on handling challenging issues. Land trusts can also share their differing talents to increase their effective capacity. For example, one land trust might have expertise in land use planning but lack experience with GIS while another has expertise with GIS but not in planning. By sharing, each might accomplish more than by standing alone..

Opportunities for Long-Term Partnerships – A winning collaboration delivers not only a successful project but also increased levels of mutual respect and

camaraderie among the individuals participating. These strengthened relationships can lead to deeper collaborations that require greater levels of trust. A winning collaboration also lets people know that there are others they can turn to when a difficult or challenging project arises.

Building Trust and Credibility – Organizations working together, demonstrating solidarity around a single issue, underscore the importance of the issue to landowners, policy makers and other stakeholders and can help to bring in new partners and supporters.

Sustainability – Rather than establishing a new staff position to fill a particular need, an organization can instead turn to another organization that already has the expertise. Organizations can each lend their greatest assets or strengths to a collaborative effort rather than potentially overextending themselves with staff hires that may not be sustainable once a project ends or the economy sours.

This section was adapted from Models of Collaboration Among Land Trusts: A Research Paper Prepared for the Maine Coast Land Trust and written by Sylvia Bates. Updated, March 2006. Used with permission from the Maine Coast Land Trust.

Challenges of Collaboration

Getting Started – Sometimes just getting the process started can be challenging when there is uncertainty on how a partnership will shake out. In addition, the resources and time that need to be invested in the beginning stages can seem daunting, especially to small or struggling organizations. Land trusts are encouraged to take the process slowly and closely evaluate how a potential collaboration will impact its mission, organizational goals and the success and execution of the collaborative project.

Avoiding Collaboration for the Sake of Collaboration – Collaboration should be seen as an opportunity to deliver better services, eliminate redundancy, and increase efficiency. Collaboration for the sake of collaboration should be viewed skeptically since it can result in poorer service delivery and inefficiencies as

land trusts devote more staff and volunteer time to the collaborative process than they gain from the outputs of the collaboration. Sometimes organizations may feel pressured by funders to develop a collaboration; although there may be merit in the partnership, the two organizations need to make the decision based on what's right for their mission and their constituents, not solely because a funder wants it to happen.¹

Trust and Turf Issues – Even though a collaborative project might well serve conservation, the potential collaboration could be seen as encroaching on an organization's turf and harming its interests, most particularly its livelihood. Achieving trust among partners is often crucial for overcoming these concerns and may take some time to reach. Good communication, open discussions and relationship building among partners are key. Balancing the power structure is important so that each organization feels comfortable with its level of decision-making powers and feels a key member of the collaboration. If an organization feels that it is sacrificing too much or not getting enough from the collaboration, it likely will begin to withdraw from the partnership, defending its own interests, rather than throwing its full support towards the goals of the project.

Once organizations complete a successful collaboration, the relationships and goodwill created often make embarking on the next collaboration less challenging and even preferable..

Crisis – Undertaking a collaboration when a partner is in crisis mode can be difficult. It's important to fully understand where each organization stands in terms of fiscal stability, organizational structure, and any current or potential legal or liability issues.

Opposing Views - The more partners involved in a collaboration, the more likely that views, priorities and implementation preferences will vary. Identifying the best interests of the overall project or mission and ensuring each partner has come to the table ready to compromise and work together is key. Using structured sub-committees can make large coalitions operate more efficiently, enabling individuals to par-

ticipate on specific issues or activities most relevant to their interests and expertise.

Self-Interest – Individuals of an organization may fear collaboration because it might threaten their own self-interests, whether it be job security, loyalty to the organization, fear of change, etc. "Each staff person brings to the workplace psychological needs for affiliation, security, and self-esteem, as well as the practical need for continued gainful employment." It's important to identify these feelings and address them openly and honestly, so that they do not undermine the collaborative process.²

General Forms of Collaboration

Land trusts can work together to advance conservation efforts in a variety of ways that effectively advance their missions and efficiently optimize available resources.

Information Sharing

One of the simplest and most common forms of collaboration is sharing information.

Land trusts can work together just by keeping one another informed of upcoming projects and long-term goals, thus eliminating unnecessary competition and redundancy of work. Many times land trusts communicate on a project that is located in a shared service area, to determine which organization should take the lead.

Sharing documents, experiences and lessons learned avoids the investment of time and money in solving problems that already have solutions. Land trusts also benefit from learning about each other's internal policies, operations, accomplishments, challenges and concerns.

It is often helpful for land trusts to communicate at the regional level, especially when they share collective goals or challenges. For example, in northern Pennsylvania, a half-dozen land trusts meet regularly to discuss issues related to the development of the Marcellus Shale.

Informal meetings provide staff and board members the opportunity to share this information and build relationships. The frequency and structure of meetings should be determined by the goals and resources of the group and should be reassessed periodically to ensure that the meetings are serving the needs of the participants without being unduly burdensome.

In addition to face-to-face meetings, land trusts can share information through listservs and social networking forums. These tools can be structured locally, regionally, statewide or around a specific issue, enabling staff and volunteers to post questions, share resources and network with other conservation leaders on a regular basis. Some of the more common social networking resources include Facebook, LinkedIn and Google+. File sharing networks, which allow groups to share documents, websites, photos, videos, etc., include Google Groups, DropBox.com, MediaFire.com, and SendSpace.com.

Resource Sharing

Land trusts may decide to share resources for a specific project or on an ongoing basis to advance their collective missions. Resources shared may include:

- Expertise and knowledge
- Software and equipment
- Supplies
- Volunteers
- Office space
- Outreach resources

When tangible resources are shared, an MOU or cooperative agreement may be helpful to protect the interests of both organizations and establish clear goals and boundaries.

Single Project Joint Ventures

Joint ventures can bring two or more organizations together to accomplish a specific project or goal. Many times, land trusts will work with another land trust or governmental agency to complete a land

transaction. These single projects may establish a level of trust between organizations that fosters the potential for deeper collaboration in the future.

Joint ventures may involve only two organizations or in cases of larger projects such as trails or landscape initiatives, many partners. The more partners involved can make the project more challenging because each organization may have different priorities or concerns but the project may not become a reality without the many partner in place.

In the case of trail and landscape projects that cover vast distances and cross several municipalities, a joint venture can be quite valuable. Local partners can work in their own communities to build cohesive support for the project, educating local leaders and residents regarding the benefits of the project while national or regional organizations can help bring in the larger funders and provide support with outreach efforts and administrative responsibilities.

Service Agreements

Land trusts may rely on other organizations to provide services, through formal agreements, that they may not have the capacity to accomplish on their own. These services vary and may occur on a one-time basis or continue over an extended period of time. Land trusts may decide to sign a contract or MOU with the organization providing the services to clarify specific expectations of each party and determine appropriate fees. Land trusts may contract with neighboring land trusts for specific services such as GIS mapping, baseline documentation, easement monitoring, strategic planning and capacity building, and organizational assessments.

Staff Sharing

Land trusts may choose to share staff through a variety of ways. Organizations may share administrative staff to help with basic office duties or share the costs to hire professional staff such as land protection specialists, GIS analysts, land use/planning professionals, fundraising experts, etc. Smaller organizations often share staff with one another that they may not otherwise be able to support alone. They may also partner

with a larger organization to provide staff support for a set number of hours per week, based on an agreed-upon rate. Land trusts may choose to jointly hire staff to manage a mutual land protection project or outreach initiative.

Sharing staff can be challenging and requires good communication among all parties, solid job descriptions that clearly define the work to be performed and the number of hours to be spent on each project and/or with each land trust. The organizations' boards of directors, personnel committees, and executive staff must consider very carefully the challenges and potential conflicts of interest that arise when two (or more) organizations each place their specific demands on one individual.

Group Purchasing

Land trusts may find that they can save considerably on products and services by combining their purchasing power and benefiting from discounts reserved for larger groups.

Organizations may establish their own pool of purchasers at a local or regional level or join one of the many member-based organizations established with the goal of giving nonprofits an advantage in bulk purchasing. Not only will organizations benefit from discounted prices and rates for products and services that they use frequently, but they will also find that they'll cut down on administrative costs for researching and purchasing these items.

A variety of nonprofit-based organizations exist for this purpose including: [Non-Profit Purchasing Group](#), [Center for Nonprofit Advancement](#) and [NonProfit Connect](#).

Fiscal Sponsorship

Fiscal sponsorship is basically one organization assuming legal and financial responsibility for another organization's project where grants and charitable donations are used. This tool is particularly useful for unincorporated groups and newly incorporated organizations that are just getting on their feet. Fiscal sponsors provide administrative services that may include financial management, human resources

management, payroll, grants management, and capacity building.

Fiscal sponsorships require consideration and care in establishing. Fiscal sponsors must be willing to assume legal responsibility for the work and actions of the organization it agrees to sponsor while the sponsored organization is dependent on its sponsor's reliability and competence. Sponsoring organizations must be financially solid, with the staff and resources in place to provide the needed services, and willing to commit to a long-term relationship with the sponsored organization. The two organizations' missions should be well aligned and policies and procedures for how the sponsorship works should be agreed upon by both organizations and put in writing. The project that the unincorporated organization is implementing must also advance and support the mission of the 501(c)(3) supporting organization.

In order for a donation to the "sponsored" project of the unincorporated organization to be considered a charitable donation eligible for tax deduction, fiscal sponsors must follow specific IRS requirements:

- Grants/donations are given directly to the 501(c)(3) tax-exempt sponsoring organization, which acts as legal custodian over the funds, retaining discretion and control as to the use of the funds.
- The funds received by the sponsor must be used for specific charitable projects that further the sponsor's own tax-exempt purpose.
- The sponsor must maintain records that establish that the funds were used for the intended 501(c)(3) purposes.

For more information, [see IRS Publication 557](#).

Mergers, Affiliations and Supporting Organizations

Land trusts, for a variety of reasons, may pursue a more comprehensive collaborative solution that may include merging its services, governance and/or assets with another organization. There are several degrees of mergers, which can range from a full merger to an

affiliation-type relationship. Such relationships, even more so than other forms of collaboration, require organizations to move cautiously, gather information and analyze all aspects of the situation carefully.

*See the ConservationTools.org guide entitled *Land Trust Restructuring: Mergers, Affiliations and Supporting Organizations* to be published in 2012 by the Pennsylvania Land Trust Association.*

Collaboration in Land Protection and Stewardship

Land Trust Standards and Practices

Standard 8. Practice I of [Land Trust Standards and Practices](#) states that a land trust should “evaluate whether it has the skills and resources to protect the important conservation values of the property effectively, or whether it should refer the project to, or engage in partnership with, another qualified conservation organization”.

Standard 8. Practice J. states that land trusts engaging in a partnership or joint acquisition of a long term stewardship project should document in writing, as appropriate, “the goals of the project, roles and responsibilities of each party, legal and financial arrangements, communications to the public and between parties, and public acknowledgment of each partner’s role in the project.”

Sharing Information and Referrals

Land trusts may share information about policies and practices and strive to hold mutually high standards regarding conservation projects. They may also develop mutual understandings about when to refer landowners to another land trust that might be a better match for the proposed conservation project.

Land Trust Beneficiary

It is sometimes desirable or necessary for a land trust to share with another land trust or other entity the rights and responsibilities regarding the administration of a conservation easement. In such cases, the grant of conservation easement may be drafted to es-

tablish one land trust as the “Holder” and the other as the “Beneficiary.” Depending on the interests of the land trusts and landowner, the Beneficiary may be granted some or all the same rights vested in the Holder by a grant of conservation easement. For example, the Beneficiary may be granted the right to enforce the easement if the Holder fails in its duty or the right to consultation before certain actions. See sections 1.07 and 5.06 of the commentary to the [Model Grant of Easement & Commentary \(6th Edition\)](#) for more information. (The Holder/Beneficiary approach provides greater flexibility and certainty in structuring collaborative relationships than simply having organizations “co-hold” easements because it more clearly sets forth the roles and responsibilities of each land trust.)

Standard 11. Practice H. of Land Trust Standards and Practices provides that “if a land trust regularly consents to being named as a backup or contingency holder, it has a policy or procedure for accepting easements from other land trusts and has a plan for how it will obtain the financial resources and organizational capacity for easements it may receive at a future date.”

Trail and Landscape-Scale Acquisitions

Sometimes it takes several organizations to protect a large parcel of land. Various partners may be brought to the table for various reasons. Smaller, local organizations may have the trust that is required of the community and the landowners but not the resources it takes to acquire the property. Larger, more regional organizations may have fundraising connections and expertise as well as access to other partners like governmental entities that could take permanent ownership of the land for the benefit of public use. Larger organizations may also bring in expertise to help with the acquisition.

Baseline Documentation

A baseline documentation report, which documents the conservation values as well as the conditions of a property, is an essential element in the creation of a conservation easement. Many large land trusts have

the capacity and knowledge base to complete baseline documentation reports in house. Smaller land trusts that may not have the staff or the volunteer expertise to complete the work may seek help from larger land trusts in their community. According to the ConservationTools.org guide, [Costs of Due Diligence in Conservation Acquisitions](#), about half of the land trusts in Pennsylvania reported conducting this work internally while a quarter of organizations have staff consult with experts where staff knowledge is lacking. A small percentage relies solely on consultants to complete the work.

Brandywine Conservancy, a large land trust in the southeastern portion of Pennsylvania, provides baseline documentation services for smaller land trusts for a fee. The small organizations benefit by cost-effectively completing high quality baseline reports. Brandywine benefits from the service revenue received and from providing services that advance its conservation mission.

Easement Monitoring

Land Trust Standards and Practices require annual monitoring of easements to ensure that the terms of the easement are being upheld. The required amount of time, and as a result, the necessary costs associated with easement monitoring depend on the terms and restrictions of the easement as well as the size, physical condition and location of the property.

Some land trusts may find that contracting with another land trust for monitoring is beneficial if the contractor land trust has well-established monitoring policies and procedures and has one or more staff with substantial monitoring experience.

In some cases, an easement is co-held by two land trusts or names another land trust as the beneficiary. This arrangement, discussed in the Examples of Collaborative Success section, enables one organization to take on the primary monitoring role but have in place a secondary layer of defense, if necessary.

Collaboration on monitoring duties requires good communication between both the land trusts and the landowner. It's important that the landowner under-

stands the roles of each organization and which to contact regarding specific concerns. For this collaboration to work, it's important for the land trust conducting the monitoring to complete the work on time and provide immediate notification to the easement holder regarding any red flags or violations.

Easements on Land Trust-Owned Properties

Land trusts sometimes partner to add an additional layer of protection to a conservation property by having one land trust own the land and another hold an easement on the land. Some view this as unnecessarily redundant and a waste of limited conservation resources; since a land trust's reason for existence is conservation, it is highly improbable that it would not conserve the priority lands it holds. Others view it as a useful fail-safe in the event a land-holding land trust falls on hard financial times or experiences a dramatic change in leadership.

Because such a partnership would result in the easement holder having to monitor the property and incur other easement administration expenses as with any other eased property, the two land trusts would need to evaluate the financial implications in establishing the partnership. For a parcel of land not yet acquired, the land trust acquiring the land might consider requesting of the landowner a stewardship endowment that can help cover the costs of the partnership. (For options in establishing landowner commitments, see [Stewardship Fees: Binding Future Owners to Present Promises](#).)

Standard 12. Practice G. of Land Trust Standards and Practices states:

The land trust has a contingency plan for all of its conservation land in the event the land trust ceases to exist or can no longer manage the property. To ensure that a contingency holder will accept the land, the land trust has complete and accurate files and stewardship funds available for transfer.

Collaboration in Other Land Trust Activities

Conservation Planning/Mapping

Land trusts can work together and with other stakeholders (state agencies, county planning offices, watershed associations) within a geographic region to identify and map permanently protected land and conservation priorities. Through a cooperative conservation mapping/planning effort, land trusts can more easily understand their respective service areas, identify unprotected parcels and more strategically pursue landscape conservation.

Outreach/Education

Organizations are finding that working together to educate the public on land conservation initiatives and those topics that relate to land conservation is an effective way to reach a larger audience and develop stronger ties to the community. Land trusts may team up with watershed organizations, farmland preservation associations, trail groups and other land trusts to expand their outreach efforts and in the process build on their conservation mission.

Advocacy Work

Combining efforts at the community, regional or even state level can be a key strategy in executing a successful advocacy program. Working together with other partners broadens the number of people working to the same end, increasing the likelihood that productive relationships for advancing the policy goal will be established, allowing efficient allocation of tasks and demonstrating to the community and policy makers that the issue is of importance to a broad demographic.

Organizations have different strengths that they can bring to the table and establishing expectations early on in the process for each organization is important. Success is more likely if the organizations have similar missions, fully support the advocacy goals established, and will clearly benefit from the the advocacy work. The more an organization feels vested in the

issue and campaign, the harder they'll work to advance the coalition's efforts.

Engaging in advocacy work as a coalition may draw an organization into uncharted territory that makes its governing board uncomfortable due to potential controversial or politically charged issues. An organization may also be wary of joining a coalition that includes organizations that loudly voice positions on issues that might be viewed as controversial. Establishing guidelines and rules of engagement, including consistent messaging and tactics, agreed upon by the whole coalition, can help alleviate such concerns.

Fundraising

Often, when it comes to fundraising efforts, land trusts find themselves competing with other land trusts and conservation organizations working in the region. Yet, land trusts can also find that working with other organizations to fund specific projects that clearly benefit all organizations can be rewarding. A land trust that is working to protect a specific parcel, for example, may seek support of organizations working in the region on a fundraising campaign where these organizations can tap their individual donors who may have a strong interest in seeing this parcel protected. Where the land trust may not have strong ties with donors, other organizations might, expanding the donor base for the project. To be successful, such fundraising campaigns must have a clear goal and an honest and open strategy, with frequent progress updates, for both cooperating organizations and donors.

Ballot Measures

Land trusts in a given service area often work together to support a local or county conservation referendum that would create a new funding source for land conservation. Organizations often work together to educate the public on the benefits of conservation and to demonstrate the need for conservation funding and the success of past conservation efforts to government officials. They also work together to implement a campaign to achieve passage of a conservation funding referendum including polling, composing ballot

language, and developing voter education programs and materials.

Exploring Partnerships

Initial Steps in the Process

Communication among Potential Partners

A good first step in exploring how organizations can work together is simply talking with one another to better understand each other's organizations. If it's not already a regular occurrence, organizational leaders with similar missions and goals within a designated service area should strive to meet 1-2 times a year to discuss overall priorities, goals, challenges and success stories.

It's also a good exercise to identify non-conventional stakeholders within an organization's service area that may be helpful in promoting the mission. For example, a land trust may decide to partner with a health-based organization to highlight the benefits of outdoor recreation or to host a celebration of foods grown on a local farm at a local restaurant.

Organizations may never go beyond information sharing, but this level of communication will help them to better focus their resources and identify priorities.

Engage Leadership

It's important to engage pertinent board and staff early on when considering collaboration. Organizational leadership should be knowledgeable of past and current collaborative efforts, recognizing strategies that have worked in the past. Each organization considering collaboration should have an open dialogue talking through potential issues and working towards having each board and staff member vested in the goals of the partnership and the process itself.

Empowered Staff

In addition to the leadership's support of the collaborative efforts, it's also important for the board to empower staff members to carry out the day-to-day responsibilities, giving them the authority to make appropriate decisions as needed.

Internal Assessment

Understanding one's own organizational needs, strengths, weaknesses, opportunities and challenges is critical in determining what the organization can lend to a collaborative process and how such a partnership can benefit the organization. It is an opportunity for the organization to take an internal inventory of what it can and cannot bring to the table in the collaborative process. An internal assessment does not have to be extensive or costly.

Facilitated Assessment

A facilitated assessment is sometimes used to determine the feasibility of a joint venture that requires substantial commitments by the potential partners. Organizations may use a facilitated assessment to learn about themselves and their partners and understand whether a collaborative effort will benefit each of the organizations involved. It's important to choose a facilitator that will provide an independent perspective and is trusted by all involved parties.

Next Steps

The next steps of the collaborative process will depend on the organizations and the type of work on which they plan to collaborate. Establishing goals for the collaboration are essential for keeping the organizations focused and ensuring that the collaborative is working towards a win-win strategy that benefits all organizations. Establishing these goals requires good understanding of each organization, trust and of course compromise. A trusted, outside facilitator may be helpful in this process.

Evaluation

An effective evaluation will help the partnering organizations improve the collaboration, track its efforts and determine how each activity brings it closer to its goals. A good resource on evaluations, including various methods and techniques, is "Evaluating Collaboratives: Reaching the Potential", published by Wisconsin Cooperative Extension.

Secrets to Success

Collaborations provide both tremendous opportunities and significant challenges for non-profit

organizations. It's important for organizations to do their homework and fully understand the required investment and anticipated benefits of a given partnership. The organization must measure the value of the collaborative work against its own mission to determine whether it's worth committing its resources.

The following guidance was written by Sylvia Bates of the Land Trust Alliance and printed in the report entitled "[Models of Collaboration among Land Trusts](#)", commissioned by and used with the permission of the Maine Land Trust Network. (The original text has been lightly edited.)

A successful collaboration or partnership includes:

Vision. It is important to have consistent missions and visions. It is crucial to achieving the ultimate goal of the collaboration. It is also essential for building and sustaining the interests of the partners, as well as the public's support.

Planning. The partners need to have a clear plan with strong but realistic goals and implementation steps. Unless the collaboration has an effective game plan, individual members will lose interest and pull their focus back to their own organization's efforts.

Mutual respect and trust. Collaboration often brings together people and groups with their own organizational culture and styles of leadership. Bringing these styles together in one room can be an intense experience. It is important that each individual and each organization be respected for their own uniqueness. Creating a culture of mutual respect and support is key.

Financial resources. If the collaboration does not have adequate resources to support its work, it may drain the resources of its individual members, eventually discouraging participation. Ensure that the necessary financial resources are in place or collected to support the collaboration and the implementation of its programs.

Leadership. Identify committed, skilled and supportive leadership to carry through on the vision and implementation plan.

Roles. The roles and responsibilities of each partner need to be clearly defined, articulated and understood by all parties. A memorandum of understanding or other written agreement that spells out the terms and conditions of the collaboration and provides protection for all parties is useful to guide acquisition, management or stewardship partnerships. (See also Practice 8J. Partnership Documentation, Land Trust Standards and Practices, Land Trust Alliance, 2004.)

Commitment. Each of the partners needs to be strongly committed to the collaboration, not just for their own organization's sake, but also for the good of the entire collaboration community. Partnerships that realized the most success had commitment at both the executive and staff levels.

Communication. Collaboration requires solid, regular communications to avoid becoming mired in misunderstanding or getting lost in the onslaught of each organization's own individual work. This is especially important in a complex collaboration, involving many partners and stakeholders.

In addition to these, the author of this guide would add the following:

Purpose. A strong collaborative effort should have a unified purpose that goes beyond collaboration for the sake of collaboration or pressure from outside sources; the desire to collaborate should not guide the process – the potential accomplishments should be the driving force.

Evaluation. It's important for organizations to periodically review their goals and evaluate their work to ensure that they are on target and each member of the collaborative is satisfied with its progress.

Examples of Collaborative Success

Information Sharing: Northeast Pennsylvania Conservation Partners

The Northeast Pennsylvania Conservation Partners is an informal group of conservation organizations working in the northeastern portion of Pennsylvania, who meet about three times a year to share information.

The group began when Pocono Heritage Land Trust's president approached Drew Gilchrist of Natural Lands Trust (NLT) to discuss a particular property to be conserved; they soon discovered that it would be helpful to meet regularly to discuss conservation goals and projects. The group evolved to include representatives from seven conservation organizations as well as state and county officials, specifically Natural Lands Trust, Countrywide Conservancy, Delaware Highlands Conservancy, Pocono Heritage Land Trust, The Nature Conservancy, Wildlands Conservancy, Pennsylvania Environmental Council, Department of Conservation and Natural Resources Bureau of Recreation and Conservation regional staff, DCNR Bureau of Forestry regional staff, and representatives from the Pike County Planning Commission and Monroe County Open Space Advisory Board.

The group has been meeting for about five years and according to Gilchrist, the secret behind its success has been its simplicity. No MOUs, no bylaws, no minutes - the group instead records action items to make the meetings more meaningful and lessen the administrative burden for those participating.

The group's primary goal is keep one another informed and share knowledge and resources. Agenda items for each meeting are determined by members of the group and every participant has the opportunity to share information and ask questions. Often times, the person who recommends a topic will take the lead and help moderate the discussion. Topics covered include easement amendment policies, property line disputes, monitoring procedures, signage outreach initiatives, fundraising efforts and database management. Many discussions have focused on the

challenges that Marcellus Shale natural gas production presents to land trusts and sharing internal policies developed to help guide the organizations in protecting the region's natural resources.

An outcome of the partnership has been a mapping project that highlights the privately and state protected areas within each group's territory. This map, which was developed by NLT with the help of the partnering organizations, enables land trusts to better understand overlapping service areas and identify key tracts to be protected for contiguous land preservation efforts.

Through this partnership, the group learned of a 1,200 acre Girl Scout camp to be placed on the market. Because the property was located within the Pocono Forests & Waters Conservation Landscape Initiative and could be a significant addition to the region's contiguous land conservation efforts, the group agreed on a lead organization to research the feasibility of permanently protecting the property.

The group also invites speakers or statewide partners to attend meetings to share important information or just learn from the group's collective experiences.

The organizations work primarily independently though they seek each other's support from time to time. Organizations were struggling with GIS capabilities and reached out to NLT; NLT was able to obtain grant funding to provide smaller organizations with GIS support. In addition, NLT has provided training to partner organizations on using tools such as Google Earth and the PA Natural Diversity Inventory (PNDI).

The group provides an opportunity to share innovative ideas and new resources. For example, Pocono Heritage Land Trust provided partners with information on their outreach efforts to promote sustainable forestry and farming practices through its Shop Local, Save Land initiative.

The partner organizations are very eager to meet together to share experiences, network, and tackle particular issues. According to Gilchrist, for this particular collaboration it was important to "keep it

simple". If the arrangement was any more complicated, he adds, it probably wouldn't work since the organizations have limited time to dedicate to anything beyond their current roles.

Collaborative Fundraising: Allegheny Land Trust et al.

The 75-acre Irwin Run Conservation Area, which buffers Allegheny County's North Park, is a signature acquisition of the Allegheny Land Trust (ALT), protecting wetlands, densely wooded slopes and stream valley. A closed portion of Irwin Road provides a beautiful walking trail through the property and access to North Park trails.

Irwin Run had been identified by Allegheny County as a "Conservation Corridor" in its 1995 Greenways Plan. The county was interested in acquiring the parcel for some time but the landowner was reluctant to transfer the land to a governmental entity. Instead she was interested in working with ALT to ensure permanent protection. In order to complete the acquisition, ALT realized that alternative funding sources were needed and a likely source would be those neighboring residents who would presumably benefit most from the acquisition. The reality, however, was that ALT did not have a strong presence in this part of the community, which would make fundraising difficult.

Instead of attempting the fundraising effort alone, ALT reached out to the network of organizations already established in the North Park community. Through the mutual interest of preserving this parcel, ALT developed strong working relationships with two key local conservation organizations, North Area Environmental Council and Friends of North Park. With an emphasis on protecting a parcel important to these two groups, ALT was able to gain the trust and support of their leadership and supporters. Capitalizing on the trust that these organizations had already established with community residents, a fundraising effort was launched with these organizations on the front line of the campaign, reaching out to their respective memberships.

Throughout the process, ALT conducted public presentations, and provided its partners with consistent messaging for outreach efforts, and constant updates on the progress of the campaign. Partner organizations communicated with members and local residents and advocated the importance of protecting this land. ALT was able to collect donations directly since trust was established with the local partners and donors felt secure that their contribution would be restricted to just this project. ALT managed local media inquiries with support from partner groups.

ALT and its partners raised \$30,000 in just six months. ALT credits the great working relationships and good communication between the partners for the success of the campaign.

Since Irwin Run, ALT has successfully raised the necessary funding for additional acquisition projects by working with local partners. The fundraising approach has been so successful that ALT has established an internal policy that requires the local community to invest at least 10% of the project before ALT will undertake the acquisition of a property.

The value of these partnerships continues to grow. Those individuals who have worked on behalf and contributed towards the acquisition of a particular property already feel vested in the project and understand how ALT works. When new acquisition opportunities arise, these key points of contact already exist and a project can get off the ground much more quickly.

ALT offers the following advice: 1) communicate often, at least weekly; 2) develop strong relationships with potential partners even before a project arises – personal relationships are key; 3) establish ground rules and identify responsibilities for each organization.

Regional Outreach & Land Protection: French Creek Conservation Collaborative

The French Creek Conservation Joint Venture began in 2007 when three organizations, Western Pennsylv-

vania Conservancy (WPC), The Nature Conservancy (TNC) and French Creek Valley Conservancy (FCVC), signed a formal agreement to build local conservation capacity and actively protect land within the French Creek Watershed.

It was to be a two-year initiative but since its inception, it has flourished to include two more organizations, an expanded set of objectives and new funding sources. The French Creek Conservation Collaborative includes its three original partners, WPC, French FCVC and TNC; and, in 2011, Pennsylvania Audubon Society and the Pennsylvania Environmental Council (PEC) came on board.

The collaborative was an easy fit since the organizations work in the region and have an interest, through their missions, in protecting the French Creek watershed. French Creek is arguably the most ecologically significant waterway in PA, containing more species of fish and freshwater mussels than any other comparably sized stream in the Commonwealth and the northeastern United States. The 1,250 square mile watershed also contains critically important wetlands with many rare plants, the best remaining natural glacial lake in Pennsylvania (Lake Pleasant) and numerous places identified by the PA Natural Heritage Program as Biodiversity Areas. The collaborative enables the groups to bring their specific strengths to the table and divide the work so that they are not competing, just working more efficiently, pooling funding sources and leveraging their resources.

PEC focuses primarily on the municipal level, educating elected and appointed officials on the value of protecting the watershed. WPC brings its science-based expertise and resources through GIS mapping, natural heritage inventory data, as well as its vast experience in acquisitions and easements. TNC has brought additional funds to the table as well as science and conservation expertise. Audubon works to educate residents in the region. All the while, FCVC, the local land trust, is working on the ground, growing its organization's membership and building relationships with landowners and the public through their work in

land protection, stewardship, outreach, education and community events.

Representatives from each organization met through a series of facilitated meetings to establish a game plan and determine a set of collaborative goals and objectives for a five-year period. These goals focused on six major aspects of work:

1. Education/Outreach
2. Branding/Marketing
3. Greater Collaboration
4. Municipal Comprehensive Planning & Zoning
5. Empowering FCVC
6. Land Protection based on designated priority areas

One of the collaboration's first objectives was developing an area of interest map, a detailed, science-based resource that would help the group determine priority focus areas, was created as a tool to guide land protection efforts. The Collaborative has established a goal of protecting 1,500 acres within the watershed in a two-year period. The map has since been refined to include active river areas and will be valuable tool in this process as it identifies areas for strategic land protection.

In 2008 the group was able to hire a full-time project manager for FCVC with a focus on land protection, outreach, stewardship and land trust accreditation.

A major goal of the collaborative is to make residents more aware of the French Creek Watershed. A baseline survey will be conducted to determine the knowledge base of the public as well as their interest and attitude toward efforts to protect the land and water in the region. A watershed 101 presentation is being prepared to educate various stakeholders including landowners, taxpayers and municipal officials, on the value of protecting the watershed. A new website is also being developed that will be ready in March 2012.

By working together, a combination of funding sources are utilized to help partner organizations acquire land and easements to fulfill land protection goals. Any of the organizations may take the lead on a project. For example, if FCVC takes the lead, WPC and TNC can provide funding and / or technical assistance if necessary throughout the process.

The collaborative works well and has been able to accomplish a number of goals in just a short time for several reasons:

- All of the groups share the same mission for the watershed, to educate landowners regarding the importance of the creek so there is a vested interest in the work.
- Each partner brings its own skills and expertise to the project, which limits redundancy and adds to the efficiency of the overall work.
- Partners can share resources and knowledge, brainstorm and bounce ideas off one another creating an innovative work environment.
- Other than an MOU which outlines the goals of the partnership and the responsibilities of each partner, there is no added bureaucracy, which allows organizations to retain their own identities.

A common mission and shared goals and resources are the cornerstone of this collaboration as well as good communication and trust between partners.

Staff Sharing: Portland North Land Trust Collaborative

The Portland North Land Trust Collaborative in Maine was established when three all-volunteer land trusts (Falmouth Land Trust, Chebeague and Cumberland Land Trust, and the Oceanside Conservation Trust) pooled their resources together, signed an MOU, and hired a full-time executive director. According to the Collaborative's website (<http://www.landtrustcollaborative.org>):

the Collaborative was born out of the belief that together these land trusts could accomplish more – protect more land disregarding town boundaries, connect with more people and generally bring land conservation, an ethic that Mainers hold very dear, to the forefront of thinking in Southern Maine.

From 2007 to 2010, the collaborative's programming and organizational structure has expanded. Collectively, these three land trusts have established a regional conservation plan, a comprehensive and shared database, a new model of Accreditation preparation and joint stewardship recruitment and training. Currently the collaborative's staff includes an Executive Director and an Administrative Assistant. The governing body is composed of three representatives from each land trust and the treasurer of the Falmouth Land Trust, which serves as the fiscal sponsor. For more information, read Land Trust Alliance's *Saving Land* article, "[Collaborating for Conservation](#)" by the collaborative's executive director, Jessica Burton.

Easement Co-Holding: ClearWater Conservancy & Heritage Conservancy

A board member of the ClearWater Conservancy (CWC) in Centre County was interested in permanently protecting her family's 196-acre property and approached the conservancy about holding the conservation easement. The landowner/board member was concerned about the appearance of a conflict of interest. After discussing the potential conflict of interest with the CWC's board of directors, both the landowner and the board felt it would be best if the conservancy took a hands-off approach, agreeing that she work with another organization to assist her with the easement.

The landowner contacted Heritage Conservancy (HC) in Bucks County, which offered initial technical support, answering questions and providing necessary guidance. The easement proved to be more challenging than most considering a number of factors, including it was enrolled in the Conservation Reserve Enhancement Program (CREP), included reserved

mineral rights and would provide for future subdivision rights. Because HC had experience in many of these issues, the organization agreed to develop the easement and co-hold the easement with CWC. CWC's board agreed to co-hold the easement with HC.

A Memorandum of Understanding (MOU) was developed between CWC and HC indicating the responsibilities of the two parties in regards to the easement. HC was responsible for drafting the easement and developing the initial baseline documentation report. HC was also responsible for holding the stewardship endowment, the amount of which was determined based on CWC's standard endowment guidelines at the time.

CWC's responsibilities include annual monitoring of the property and developing an annual report based on these monitoring efforts. According to the MOU, HC must reimburse CWC for its annual monitoring work through the endowment.

HC authored the easement and provided CWC with the opportunity to provide input. CWC was satisfied with the easement and offered no additional changes.

Once the landowner leaves CWC's board, the MOU states that both the easement and endowment could be transferred to CWC, upon both organizations' approval.

The landowner provided HC with a small donation, which covered some of the organization's staff expenses in researching and authoring the easement.

Both organizations have found this collaboration to be very successful.

Easement Beneficiary: Montgomery County Land Trust and Natural Lands Trust

Montgomery County Lands Trust (MCLT) and Natural Lands Trust (NLT) serve as beneficiaries of each other's conservation easements.

The beneficiary relationship between NLT and MCLT grew from a close working relationship on projects,

sharing the talents and resources of both organizations. Often, the two organizations work together on easement transactions, with one organization as the designated lead. The beneficiary is often added because both land trusts have been equally invested in the project and adding a beneficiary is an added layer of protection. Sometimes the beneficiary is required by a particular funding source.

As of 2012, MCLT is either the beneficiary or co-holder on five easements with NLT. NLT is the beneficiary on five MCLT easements. For some easements, the two land trusts share the monitoring duties. In other cases, one land trust acts as a "back up" agency in case the holder fails to fulfill its responsibility.

Both MCLT and NLT hold many easements for which township and/or county entities serve as beneficiaries. This beneficiary role may be important to municipalities that funded the acquisition of an easement through bonds or taxes and want to hold an interest in the property, to maximally protect their investment. The beneficiary relationship is often preferable for municipalities that feel more comfortable with the land trust taking the primary enforcement role. NLT prefers that the government entity's role be limited to enforcing in the case of failure by NLT, and amendment approval, but some townships want a more active role, such as review and approval of reserved rights, co-monitoring visits, etc. NLT tries to be flexible so long as the roles and responsibilities are clear.

Both MCLT and NLT land trust staff admits that beneficiaries can complicate administration of the easement and are used only when deemed necessary in the permanent protection of the property. Additional work is often necessary when reporting to the other organization and coordinating monitoring duties.

Staff also recognizes that there are potential issues that make the relationship much more complicated – issues that have not yet occurred. Two examples are a potential disagreement on whether a violation has occurred and how it should be rectified and the land trust's legal responsibility if the primary holder neglects its duties.

Both organizations agree that to make this relationship work, a common mission and strong level of trust between the two organizations is essential.

Fiscal Sponsorship: Allegheny Land Trust and Bradford Woods Conservancy

The Allegheny Land Trust (ALT) serves as fiscal sponsor for the unincorporated group of individuals calling themselves the Bradford Woods Conservancy (BWC), an unincorporated group. The relationship was formally established in a 1994 memorandum of understanding.

The relationship enables donors to receive federal tax deductions for donations in support of conservation projects led by BWC in the Borough of Bradford Woods. It also gives donors the assurance that their gifts are being managed by a well-established and managed entity.

BWC leads the fundraising efforts in Bradford Woods, encouraging gifts to ALT. BWC doesn't hold the federal tax status necessary for donors to receive deductions but ALT does. Donors may make gifts to ALT's Bradford Woods Conservancy Fund, which is restricted to the purpose of supporting conservation projects in Bradford Woods. ALT controls the disbursement of funds to ensure consistency with the mission of BWC and the intent of donors.

Benefits of the relationship to BWC include:

- BWC does not have the administrative demands or expenses of operating a nonprofit organization, including securing and maintaining federal 501(c)3 tax status.
- BWC can assure donors that their money will be managed wisely by an accredited land trust, increasing the likelihood that gifts will be made.

Benefits of the relationship to ALT include:

- Work in Bradford Woods advances ALT's mission of "conserving and stewarding lands that

support the scenic, recreational and environmental well-being of communities in Allegheny County and its environs".

- Donors who give to the Bradford Woods Conservancy Fund are free to make additional contributions to ALT.
- ALT may retain interest earned from the Bradford Woods Conservancy Fund (although this is a minimal incentive in the 2012 low interest rate environment).

Benefits to the community include:

- The inefficiency of donors having to support another fully operating nonprofit organization is avoided.
- Donors may receive a federal tax deduction for their generosity.
- Donor gifts are managed by an accredited land trust.

The partnership enabled the borough's acquisition of 4.5 acres for its Bradford Woods Reserve. Later, ALT accepted a conservation easement on the borough-owned land. The borough maintains the property with the help of BWC, which works to protect the natural area and manage its land and water resources.

To establish a more symbiotic relationship, ALT Executive Director Roy Kraynyk suggests that the fiscal sponsor charge an administrative fee or leverage its efforts into volunteer hours provided by the supported organization.

Collaborative Event: Brandywine Conservancy, Montgomery County Lands Trust and Natural Lands Trust

Montgomery County Lands Trust, Brandywine Conservancy and Natural Lands Trust, three organizations working in southeastern Pennsylvania, have worked tirelessly, to promote the value of the federal tax incentive for conservation easements and to advocate for the permanent extension of the enhanced tax incentive.

The three land trusts invested a great deal of time educating their local congressman and his staff on the value of the tax incentive for conservation and how it has impacted land conservation efforts in his district. The geographic spread of the congressional district required the organizations to work together and collectively build the relationship. The organizations' outreach was successful and the congressman agreed to champion a bill that would extend the tax incentive permanently. Although the bill had not gone to vote, the number of co-sponsors, 260 from 48 states, far exceeded the expectations of land conservation advocates; the bill was viewed as a success in transcending party politics in a very politically divided Congress.

The three organizations recognized the need to publicly thank the congressman for his leadership and, in the process, educate the public on the value of the tax incentive.

A press event was held at Hawthorne Farm, an eased property protected by the Montgomery County Lands Trust. The owner of the farm participated and reaffirmed the importance of the incentive for his family and his land. Mr. Hawthorne was able to protect his property thanks to the 2006 enhanced tax incentive that has helped thousands of farmers, ranchers and other landowners of modest means to conserve their land. All three organizations contributed their talents and resources to making the event successful.

Conservation Ballot Measure & Land Acquisition: Adams County, PA

National organizations often partner with locally-based organizations in order to advance public support for conservation funding referenda. The example of The Nature Conservancy, The Trust for Public Land and The Conservation Fund working with the Land Conservancy of Adams County, the Appalachian Trail Conservancy, and the Adams County Farmland Preservation Board is described in the [Conservation-Tools.org](#) guide [Conservation Referendum](#).

Statewide Collaboration to Improve Public Policy: Growing Greener 2

In fall 2002, a small group of conservation leaders began developing a white paper addressing the loss of open space in Pennsylvania and the need for new state investment in land conservation.

The group identified what they called a green gap -- for every three acres of land lost to development, only one acre was protected. They suggested that Pennsylvania, within ten years, achieve "one-for-one", for every one acre of land developed, an acre of land would be preserved. To achieve this goal, a three-part strategy was proposed: 1) investment in conservation; 2) prioritizing conservation; and 3) planning for and supporting smart growth land use principles.

To ensure that conservation concerns were appropriately addressed and to build consensus, the Pennsylvania Land Trust Association (PALTA), as the organizational leader, invited all land conservation organizations working in the state to review and comments on a draft of the paper.

The final paper, "Protecting Special Places and Building Healthy Communities: A Conservation Strategy for Pennsylvania" was issued in mid-2003 with 67 organizations ultimately endorsing the strategy.

Building on the momentum created by the paper and discussions amongst leaders of both land conservation organizations and other environmental and recreational groups, it was agreed that an overnight retreat should be held to focus leaders on advancing the cause of boosting state investments in the environment. Goals of the retreat included (1) airing past and present differences and grievances and bringing them to resolution; (2) establishing unity of purpose; and (3) mapping a strategy for moving forward. In January 2004, the retreat was held in a geographically and electronically remote location to ensure focus on the subject at hand.

The "Conservation Strategy for Pennsylvania" became the coalition's blueprint for promoting new state investments in conservation. Organizations advocated for the paper's recommendations, sharing the paper

with state elected and appointed officials, media and other opinion leaders. As a result of the coalition's outreach, the newly-elected governor incorporated some of the paper's concepts (and prose) into his administration's priorities.

A complex legislative dance resulted in the legislature and the governor supporting a referendum question on the May 2005 primary election ballot. Voters would be asked whether they supported a \$625 million bond issue to support environmental programs, including watershed protection, abandoned mine reclamation, acid mine drainage remediation, farmland and open space preservation and "other environmental initiatives."

Although a bond issue was among the least preferred outcomes desired by the coalition, the coalition mobilized to make the best of the situation, working hard to educate voters on the importance of Growing Greener and urging voters to vote Yes on the measure. Each organization contributed in different ways depending on its means and skill sets.

Individuals in the coalition established a political action committee (PAC) to raise funds that could be used to assist in the successful passage of the referendum. One coalition member created the PAC, another served as treasurer, and another acted as the primary fundraiser.

The Growing Greener ballot was approved for the May 2005 primary ballot. Over 60 percent of voters supported the new funding for environmental programs. The "yes" vote carried in 47 of 67 counties across the state. Even in those counties where it was not approved, the margin of loss was relatively small.

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Submit Comments and Suggestions

The Pennsylvania Land Trust Association would like to know your thoughts about this guide: Do any subjects need clarification or expansion? Other concerns? Please contact Andy Loza at 717-230-8560 or aloza@conserveland.org with your thoughts. Thank you.

Acknowledgements

Nicole Faraguna researched and wrote this content.

The Pennsylvania Land Trust Association published this guide with support from the William Penn Foundation, the Colcom Foundation and the Community Conservation Partnerships Program, Environmental Stewardship Fund, under the administration of the Pennsylvania Department of Conservation and Natural Resources, Bureau of Recreation and Conservation.



Colcom Foundation

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¹ United Way of Greater Milwaukee et al. Non-Profit Collaboration & Mergers: Finding the Right Fit – A Resource Guide for Nonprofits, p. 22.

² La Piana, David. Beyond Collaboration: Strategic Restructuring of Nonprofit Organizations. (revised ed.) 1999, p. 11.