

ALLEGHENY COUNTY LAND TRUST COLLABORATION FEASIBILITY STUDY

**FINAL REPORT
PREPARED FOR**

*Allegheny Land Trust
Chartiers Nature Conservancy
Fox Chapel Land Trust
Hollow Oak Land Trust
Pine Creek Land Conservation Trust*

*Rachel Carson Trails Conservancy
Scott Conservancy
South Fayette Conservation Group
Western Pennsylvania Conservancy*

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There is only one thing more rewarding than living in a beautiful setting.

Protecting it.

Thanks to the funders, Steering Committee, participating land trust Board members and staff for their time and efforts that enriched and made this effort possible.

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1 Executive Summary

In the wake of well-publicized improprieties among large national environmental organizations, land conservation groups of all sizes are under increased pressure to adhere to standards that ensure they are operating in an accountable, ethical, and sustainable way. Due to this push for greater accountability and the corresponding organizational demands, diminishing public and private funding, and an emphasis on collaboration by local funders, land conservation groups in Southwestern Pennsylvania are examining how they can work together to advance their missions more efficiently and effectively.

Dewey & Kaye was asked to study the potential for greater collaboration among local land trusts and conservation groups in Allegheny County, Pennsylvania. Nine local organizations, ranging from all-volunteer local land trusts to a regional-scale organization, participated. A steering committee, comprised of representatives from four participating land trusts, worked with Dewey & Kaye to plan and coordinate the project.

For the purposes of this report, collaboration is classified in three stages corresponding to the level of integration required between participating organizations. The following outlines these three stages of collaboration:

- **Cooperation** is characterized by a commitment among organizations to work together. All decision-making power remains with the individual organizations. Examples range from sharing information to working together on individual conservation projects.
- **Strategic Alliance** includes moderate integration involving a commitment to continue with the collaboration for a period of time. Some decision-making power may be shared or transferred, although organizations retain their individual identities. Examples of strategic alliance span from consolidating administrative functions to joint programming.
- **Merger** represents the greatest amount of integration on the continuum and involves changes to corporate control or structure. Examples of such organizational restructuring include parent-subsidary relationships and joint ventures.

Organizational profiles, completed by eight of the nine participating organizations, indicate that most are all-volunteer organizations with operating budgets ranging from \$4,000 to \$36,000, and memberships of 54 to 450. Five of the participating all-volunteer land trusts have protected 70 acres or less through ownership and conservation easements or deed restriction and one has protected over 300 acres. These all-volunteer organizations have strong connections with their local communities but in many cases lack the personnel and monetary resources needed to sustain their program activities and meet the standards and practices being set forth by the Land Trust Alliance.

Based on the information gathered from the stakeholder meeting and the online survey of Board members, there is clearly broad-based support and interest in greater collaboration among local land trusts. Many organizations have already started to initiate collaborative efforts. The survey results provide additional evidence of the willingness of local land trusts to consider collaboration to achieve their missions. It is significant that 100% of respondents were at least willing to consider collaboration with other organizations. Eighty-nine percent (89%) of survey respondents indicated that they *would be willing*, while another 11% indicated they *may be willing* to consider collaboration. Survey respondents pointed to the following as the top three potential benefits they would hope to see from future collaborative efforts:

- Reducing Expenses
- Increasing Protected Acreage
- Sharing Knowledge and Skills

Land Trusts and conservancies across the country are turning to each other for support, information, training, and much more. Through collaboration, land trusts have been discovering that together they can do more with less; they can protect larger tracts of ecologically relevant or important land, reduce their expenses, share expertise and skills, conduct joint planning, and undertake more effective outreach efforts. The five conservation organizations interviewed for the national best practice component of this study all felt they benefited from collaborating with other conservation groups. These five organizations provide excellent concrete examples of how land conservation organizations can work together to achieve some important local goals, including reducing expenses, increasing protected acreage, and sharing knowledge and skills.

There are many opportunities for land trusts in Allegheny County to collaborate and maximize their efficiency and impact. For the purposes of this study, such opportunities have been presented in the context of short, mid, and long term opportunities for greater collaboration.

Opportunities for Greater Collaboration

Short-Term

- **Establish More Regular/Organized Meeting Schedule:** Future collaboration efforts are dependent on strong relationships and trust between participating land trusts.
- **Evaluate Administrative Costs:** In the short-term, local organizations should explore ways, short of strategic restructuring, to reduce D&O insurance, liability insurance, and other administrative costs. However, these opportunities appear to be limited. More substantial structural changes will be required to realize significant cost savings for participating land trusts.

- **Create Structure for Future Efforts:** To sustain interest in collaboration, local land trusts should develop a structure for future efforts, including a coordinating group and written agreement.

Mid-Term

- **Explore Shared Communication and Outreach Efforts:** Local organizations can reduce time and expenses associated with individual efforts while at the same time presenting a more unified message to the public and interested funders.
- **Shared Support Staff:** A shared staff arrangement would allow local land trusts to share expenses associated with full time professional staff. Smaller organizations would have access to technical expertise that they would not otherwise be able to afford.
- **Increase Project-Based Collaboration Efforts:** While local land trusts work together on individual conservation projects, there is room for additional project-based collaboration on functions like fundraising and development.

Long-Term

- **Joint Regional Planning:** More regional planning among these land trusts would help to ensure that conservation efforts are complementary and occur in the most efficient and effective way. Regional goals for land conservation would help to focus communications with the public and the funder community.
- **Strategic Restructuring:** While there are opportunities for local land trusts to restructure themselves, reducing both service and service area overlap, as well as increasing effectiveness, these alternatives can only be successful when based upon mutual trust and strong working relationships between these organizations. Many of the short-term and mid-term options will help to prepare these land trusts for future strategic restructuring efforts.

To realize the benefits of collaborative efforts, local organizations will need to identify how they can sustain interest and focus on working together. Local land trusts should quickly establish a framework for future collaborative efforts through the following four immediate *next steps*:

1. Form a representative steering committee to encourage and coordinate future efforts
2. Set common goals and priorities to guide collaboration efforts
3. Schedule regular meetings to share training and information
4. Select and agree upon opportunities for organizations to work together for mutual benefit

2 Introduction

This Land Trust Collaboration Feasibility Study was initiated by a group of nine local land trusts in Allegheny County which are interested in exploring opportunities to engage in greater levels of collaboration. Through increased collaboration, they hope to increase the protection of important open space in Allegheny County and to use their scarce resources more efficiently.

The following organizations participated in the collaboration study:

- *Allegheny Land Trust*
- *Chartiers Nature Conservancy*
- *Fox Chapel Land Trust*
- *Hollow Oak Land Trust*
- *Pine Creek Land Conservation Trust*
- *Rachel Carson Trails Conservancy*
- *Scott Conservancy*
- *South Fayette Conservation Group*
- *Western Pennsylvania Conservancy*

2.1 Methodology

Dewey & Kaye was contracted to study the potential for greater collaboration among local land trusts in Allegheny County. Prior to this effort, two meetings had been held among the organizations. Dewey & Kaye worked with a project planning committee, composed of representatives from four of the participating land trusts, to finalize the work plan and approach for the project. As an initial part of the collaboration study, board members and staff from these organizations participated in a joint planning meeting to discuss their collaborative efforts to date, explore ideas for future cooperation, and identify their expectations for the project. Ideas generated at this initial stakeholder meeting were documented by Dewey & Kaye staff and used as input for subsequent project analyses, including national best practice research and a regional land trust survey.

Following the joint planning meeting, the following research was undertaken by Dewey & Kaye:

A. Land Trust Survey

- Developed an online survey, with the input of the planning committee, to solicit individual perceptions about collaboration and determine the degree of willingness within the local land trust community to work together.
- Analyzed responses to identify the most promising areas for local collaborative efforts.

B. Organizational Profiles

- Developed a detailed questionnaire for all participating organizations to gather more in-depth information about their activities, use of funds, land stewardship policies and practices, and other operating specifics.
- Analyzed responses to identify strengths and limitations of the current land trust organizations.

C. National Best Practice Research

- Identified examples of collaboration among land conservation organizations from basic cooperation to full-fledged integration of operations and finances.
- Contacted representatives from five organizations participating in collaborative activities to ask a series of specific questions about their collaboration.

3 Land Conservation in Allegheny County

3.1. History of Collaboration

While local land trusts have worked together on a few joint initiatives, collaborative efforts have primarily been limited to individual projects rather than more substantial and/or long-term collaboration as part of a larger effort to share resources or do integrated planning. These local organizations frequently will work with another land trust or municipal government to carry out clean-up or stewardship activities for a particular property. For example, the Scott Conservancy, together with the Mt. Lebanon Nature Conservancy, maintains a garden at a prominent entrance to both communities.

In addition to individual project collaboration, local land trusts have expressed interest in working together on operational issues such as joint conservation planning or cost sharing with other local organizations. In 2002, representatives from local land trust organizations met to discuss opportunities for collaboration and willingness among them to work together. These local organizations also held a joint stewardship training session. However, no other significant collaborative efforts developed as a result of this initial meeting. Recently, Allegheny Land Trust worked to revive land trust collaboration efforts and raised the funds for this study because of the potential benefits to the local land trust community.

3.2. Local Land Trusts

Table 1 below provides a brief profile of the local land trusts that completed the organizational questionnaire for this Land Trust Collaboration Feasibility Study. In addition to the information included in the table, the questionnaire collected more detailed financial information including the following:

- Annual Operating Budget
- D & O Insurance
- Liability Insurance
- Annual Web Site Cost
- Annual Newsletter Cost

Table 1: Participating Land Trusts

| | Allegheny Land Trust | Fox Chapel Land Trust | Hollow Oak Land Trust | Pine Creek Land Conservation Trust | Rachel Carson Trails Conservancy | Scott Conservancy | South Fayette Conservation Group | Western PA Conservancy |
|------------------------------|--|------------------------------|------------------------------|---|---|--------------------------|---|------------------------------------|
| Staffing | 2 Full Time | None | 1 Part Time | None | None | None | None | 168 Full Time |
| Number of Members | 922 | 300 | 112 | 54 | 450 | 200 | 40 | 17,700 |
| Acres Under Easement | 124 | 29 | 5 | None | 0.5 | 0 | 0? | 28,725 |
| Acres Under Ownership | 1,094 + 70 acres trans. to Montour Trail | 37 | 385 | 37 | 5 | 50 | 0 | 10,159.87 + 6,160 subsurface |

The profile above of participating land trusts in Allegheny County indicates that most (five out of eight) of these organizations are small, all-volunteer land trusts. Six of the eight organizations profiled have relatively limited operating budgets (three under \$5,000; three under \$40,000) and relatively small local membership (four with 200 or fewer and two with fewer than 500). In terms of conservation, the five all-volunteer land trusts have protected up to 66 acres each via fee or easement.

Land trusts have been able to bring significant support from the state for local conservation efforts. As an example of the resources that local land trusts are able to garner to support land conservation efforts in the Pittsburgh region, these land trusts were awarded more than \$1 million dollars in grants through the Department of Conservation and Natural Resources' Community Conservation Partnership Program during the June 2005 and August 2005 grant cycles.

Strengths of Local Land Conservation

- A. Grassroots Organizations:** While the region does have land trusts with paid staff, six of the nine land trusts included in this study are all-volunteer organizations. It is a testament to the commitment of the individuals involved that they have been able to rally local support and protect important land. Several of these all-volunteer organizations have garnered the support of hundreds of members despite relatively small operating budgets.
- B. Interest in Greater Levels of Collaboration:** Land trusts in the region have recognized the need for greater collaboration among themselves. Prior to beginning this project, these organizations met as a group in 2001 and 2002 to discuss the potential for collaboration. In addition, individual organizations have been making the most of their scarce resources by working with municipal governments, other land trusts or other partners to complete projects. Every organization can point to successful collaborative efforts they have been able to undertake to advance their mission. In a region that struggles with fragmentation and duplication in its local government (there are 130 municipalities in Allegheny County) and in economic development efforts, it is a substantial achievement that the local land conservation movement recognizes the importance of greater collaboration.

Limitations of Local Land Conservation

Despite the strengths of the local land conservation movement mentioned above, the limitations outlined below could present future challenges.

A. Land Trust Alliance Standards and Practices – Given the increased attention to the Land Trust Alliance’s proposed accreditation process, it is important that local land trusts pay close attention to areas where their organization does not meet the Land Trust Alliances Revised Standards and Practices. There are several areas that are of particular concern. For example, the standard about organizational mission states that “the land trust regularly establishes strategic goals for implementing its mission and routinely evaluates programs, goals and activities to be sure they are consistent with the mission.” Several of the organizations participating in this study reported in the survey that they either do not have a strategic plan or their plan has not been updated recently. A current, approved mission and strategic plan are essential building blocks for a stable, sustainable organization. With no clear sense of direction or reason for being, volunteers, members, funders, and the community can become frustrated and lose motivation and/or decide to invest their time and/or money elsewhere.

In addition, not all local land trusts have appropriate policies for evaluating and selecting conservation projects or ensuring that land acquisitions are legally and technically sound. It is important that each group has written criteria, consistent with its mission, which are used by the board to evaluate individual projects. Projects that do not meet the agreed upon criteria should not be approved. Currently, many of these organizations lack evaluation criteria for conservation projects. Once a project is selected the group should follow a standard set of steps to complete the transaction. For example, a survey and environmental assessment should be completed prior to property acquisition. Although most organizations follow a detailed process prior to acquisition, not all do. Given the potential for significant negative repercussions to the local land trust movement, all organizations must have a thorough evaluation process to ensure legally and technically sound transactions.

Another area of concern for local land trusts is their stewardship activities. While the land trust standards related to stewardship outline multiple required practices, there are several areas of particular concern. Based on self-reporting, several local organizations do not have baselines for the land they preserve while others do not have baselines for all properties. Documented baseline information is essential for an organization to appropriately maintain the unique conservation values of protected properties over time. In addition, four organizations do not have stewards for their protected land, making it difficult to proactively monitor properties for potential problems and ensure that conservation values are being upheld and the land is truly being preserved.

B. Fragmentation: Another limitation of the local land trust movement is its fragmentation. This is due in part to the number of organizations involved and the lack of an overarching strategy to guide local land conservation efforts. While the local land trusts help to engage local residents and municipal leaders about conservation issues occurring in their neighborhoods, the current level of collaboration among them does not support a strategic approach to land conservation in the region. In some instances, multiple organizations are working within the same watershed without any significant joint strategic planning about the best way to protect critical habitats and conserve land in a way that provides a cohesive network of green space.

The lack of an overarching strategic plan for land conservation in Allegheny County prevents local land trusts from focusing their efforts on projects with the greatest overall benefit. In addition, the fragmentation of local land conservation efforts makes it more difficult to communicate the importance of the issue to the public and the funding community. In the case of the general public, the current structure of land conservation work can confuse county residents about what organizations are doing or how it benefits them. Rather than speaking with one voice about why land conservation is important to the future of the region, funders and the public frequently hear from individual organizations about a narrow range of projects affecting only a small part of the community.

4 National Examples of Land Trust Collaboration

4.1 The Collaboration Continuum

The three main categories of collaboration range in integration from cooperation through strategic alliance to merger as illustrated in Figure 1 on page 12. Cooperation is a starting point for organizations interested in working together. It demands the least in terms of commitment, organizational change, and long-term consequences to the organizations' structure. Examples of land trust cooperation from the national best practice research are outlined in section 4.2 and include the following: sharing information and building relationships; collaborating on projects or easement stewardship activities; smaller organizations using the professional staff of a larger organization to help with such functions as administration, fundraising, and membership mailings; and service centers, where land conservation organizations contract for professional services, typically through an annual membership fee or on an hourly or contract basis.

Strategic alliances are the next step in the collaboration continuum. In contrast to cooperation, strategically aligning multiple organizations for the purpose of consolidating administrative functions or joint programming requires a greater degree of comfort

and a stronger relationship among partnering organizations since they will be making a more significant commitment. In the interest of such an alliance's benefit to all involved organizations, one or more may yield some aspect of their autonomy, particularly in the realm of decision-making. Changes in governance or structure may or may not occur but participating organizations typically maintain their individual identities. However, the joined efforts of a strategic alliance are intended to further the missions of participating organizations through such benefits as increased funding and organizational capacity to conserve land.

Merger, the final stage of the continuum, clearly involves a significant degree of commitment and familiarity since it brings changes to corporate control and/or structure. Organizations embarking on a merger must be compatible both in mission and vision since it is a total integration of the initial organizations. Depending upon the organizations involved, merger can lead to the dissolution of one or more organizations into another or the formation of a new organization.

Figure 1



| | Cooperation | Strategic Alliance | Merger |
|--------------------------|--|---|---|
| Characteristics | <ul style="list-style-type: none"> No permanent organizational commitment Decision-making power remains with individual organizations | <ul style="list-style-type: none"> Involves a commitment to continue Decision-making power may be shared or transferred | <ul style="list-style-type: none"> Involves changes to corporate control and/or structure |
| National Examples | <ul style="list-style-type: none"> Blue Hill Heritage Trust/Island Heritage Trust Cape Cod Compact Gathering Waters Conservancy | <ul style="list-style-type: none"> Blufflands Alliance | <ul style="list-style-type: none"> Grand Traverse Regional Land Conservancy with Old Mission Conservancy Western Reserve Regional Conservancy |

4.2 Examples of Cooperation

The information outlined below was obtained through telephone interviews with staff of local conservation organizations around the country. In addition, information about land trust collaborative efforts was gathered through Internet research and a review of available literature.

A. Blue Hill Heritage Trust (BHHT)/Island Heritage Trust (IHT): Cooperation on Land Conservation Project – Caterpillar Hill

- **Location:** BHHT – Blue Hill, Brooklin, Brooksville, Penobscot, Sedgwick, and Surry Maine; IHT – Deer Isle, Maine
- **Staff:** BHHT – 2 full time; IHT – 1 full time, 1 part-time bookkeeper
- **Operating Budget:** BHHT – \$150,000
- **Acres Owned:** BHHT – 1265; IHT – 330
- **Acres Under Conservation Easement:** BHHT – 2841; IHT – 680

Initial Goal of Collaboration: To work together on fundraising to buy scenic property in BHHT’s service area that is a gateway parcel to IHT’s service area (an island).

Scope of Collaboration: The cooperative effort between these two land trusts was a single project joint venture to raise the funds necessary to acquire Caterpillar Hill, 124 acres within the Blue Hill Heritage Trust’s (BHHT) service area that serves as a gateway parcel to the Island Heritage Trust’s (IHT) service area. With a written agreement in place, IHT helped with approximately one third (\$100,000) of the fundraising required for the purchase. BHHT managed negotiations with the landowner, developed the fundraising materials, and now holds the land. Since combining their efforts to conserve Caterpillar Hill, the two land trusts have more recently entered into discussions including some joint conservation planning.

Benefits of Collaboration:

Working together on the fundraising for this conservation project enabled these two land trusts to succeed at conserving 124 acres within BHHT’s service area. The benefit to IHT for its efforts is that by working together with BHHT a gateway parcel was preserved. The collaborative project led to lower process costs and strengthened the relationship between the two organizations. As a further result, these two land trusts are engaging in other discussions including an arrangement that allows IHT to conduct some of its own fundraising within BHHT’s service area, and the two land trusts have entered into some joint conservation planning.

The representative interviewed felt the short-term, project-based nature of the collaboration worked well and contributed to its success

Challenges of Collaboration:

No challenges were reported during the interview with BHHT. (Dow, 30 June 2005)

B. Cape Cod Compact: Land Trust Service Center

- **Location:** Massachusetts
- **Staff:** 4 full time
- **Operating Budget:** \$200,000
- **Acres Owned:** none
- **Acres Under Conservation Easement:** none

Initial Goal of Collaboration: Six land trusts held several meetings and decided they could accomplish more by creating a separate entity to provide support services.

Scope of Collaboration: The Cape Cod Compact (Compact) is a non-profit land trust service bureau or “consulting consortium” separate from the 25 member land trusts the organization serves. Members receive 20 hours of service for a \$1,500 annual fee and can contract for more time. The following outlines some examples of services available through the Compact:

- Administration
 - Staff member is parceled out to two land trusts—one for land owner outreach, the other to organize an auction fundraising event
- Fundraising
 - Grant writing
 - Donor outreach
 - Targeted mailings based on assessor’s data
 - Special event planning
- Land Protection
 - Conservation restrictions – baseline condition
 - Negotiate with land owners regarding reserved rights; charitable/bargain sale
 - Planning maps
 - Parcel prioritization
- Legal
- Land Stewardship
 - Land management plans
 - Trail guides
 - Invasive species control
 - Habitat assessment inventory
 - GPS trail work – GIS mapping
- Public Relations
 - Outreach
 - Parcel info sheets for town meetings
 - Press releases
- Training
 - Environmental Value Analysis
 - Outside Funding
 - Landowner Negotiations
 - Tax Incentives for landowners

The board of the Compact, which meets every two months, includes both sitting members and delegates from member land trusts. The Compact rarely does direct conservation such as holding a conservation easement except for back up easements. For example, one member land trust was not legally structured to hold an interest so the Compact helped facilitate the blanket conservation restriction.

Benefits of Collaboration:

- Relationship among member land trusts
- Increase strength of member trusts
- Regional projects at landscape level
- Cape Cod Land Fund: This revolving loan fund provides local land trusts with timely access to capital for purchasing critical property for conservation. Whenever there is enough interest the Compact doles out mini grants of \$1,000. <http://www.compact.cape.com/CCLandFund.htm>

Challenges of Collaboration: Getting diverse personalities from the participating organizations to work together presents the greatest challenges when facilitating collaborative efforts among member land trusts. (Lach, 30 June 2005.)

C. Gathering Waters Conservancy: Land Trust Service Center

- **Location:** Wisconsin
- **Staff:** 6 full time, 2 part time
- **Operating Budget:** \$500,000
- **Acres Owned:** none
- **Acres Under Conservation Easement:** none

Initial Goal of Collaboration: Gathering Waters Conservancy (GWC) was established by a coalition of land trusts, which decided that an umbrella organization was needed to be the statewide voice of land conservation.

Scope of Collaboration: GWC serves as an education and technical assistance center for both land trusts and landowners. Services available through GWC include one-on-one consultations to area land trusts (organizational assessments, site conservation planning, regional workshops in media relations and outreach, membership development, strategic and work plan facilitation, conservation easement workshops, conservation easement baseline documentation and monitoring), one-on-one advisory services for landowners to learn about land conservation options, and facilitation of collaborative efforts among Wisconsin land trusts.

Benefits of Collaboration: The following outlines the major benefits that this service center brings to land trusts and conservancies in the state of Wisconsin:

- Mentoring smaller organizations
- Capacity building
- One-on-one training
- Referrals
- Legislative lobbying support
- Education of landowners about land trusts' work and promotion of public awareness regarding accomplishments of land trusts across the state
- Reflecting/amplifying voice of land conservation
- Facilitate collaboration among Wisconsin land trusts—Regional collaborations have encouraged land trusts to work more strategically
 - Lake Michigan Shorelands Alliance
 - Northwest Wisconsin Partners in Preservation
 - Milwaukee County Conservation Coalition

Challenges of Collaboration: In terms of the regional collaborations facilitated by GWC, determining common ground such as overlapping service areas, common strategic or conservation goals, and/or shared benefits, is a crucial component for successful collaboration. GWC has faced challenges in helping some collaborating organizations find a strong rallying point. (Solomon, 30 June 2005)

4.3 Examples of Strategic Alliances

A. Blufflands Alliance: Land Trust Coalition (*Not a Separate Organization*)

- **Location:** Iowa, Minnesota, Mississippi, Wisconsin – Upper Mississippi blufflands region stretching along 400 miles of the Mississippi River between St. Paul, MN and Clinton, IA.
- **Staff:** 14-15 FTE among six organizations, though no staff of its own
- **Operating Budget:** \$150,000
- **Acres Owned:** none
- **Acres Under Conservation Easement:** none
- 17,000 acres have been protected among 6 organizations

Initial Goal of Collaboration: “Building capacity to protect the resource” – four original land trusts decided to come together through this alliance for the sole purpose of acting as a uniting force to conserve land along the blufflands of the Mississippi River and build the capacity of participating organizations.

Scope of Collaboration: The sole purpose of the Alliance (comprised of West Wisconsin Land Trust, Minnesota Land Trust, Mississippi Valley Conservancy, Jo Davies Conservation Foundation, Natural Land Institute, and Iowa Natural Heritage Foundation) is to act as a uniting force to build the capacity of the six partner organizations, not to create competition among partners for energy or funding. There has been no change to the governance or structure of any of the Alliance’s organizational members as a result of participating in the coalition. Alliance members identify land protection, communication, education, and fundraising priorities as a group. Partners set their own strategic plans within the scope of the Alliance’s larger plan. Different partners take on the role of managing partner for grants. The Alliance has no website or newsletter, which could potentially divert money or energy from the organizations involved.

Meetings are held quarterly with the location rotating from state to state. The host organization arranges the meeting space and is responsible for the agenda. The subsequent host is responsible for meeting minutes, and each organization pays its own expenses. On average, 15-20 representatives attend each meeting. Sub-sessions are often held for Executive Directors to focus on broad strategy issues and for staff to concentrate on conservation issues. Meetings can also be a forum for other collaborations between the Alliance and organizations like Audubon, the Nature Conservancy, or the Conservation Fund. The Chairmanship of the Alliance alternates among the organizations.

There has been no change in the governance or organizational structure of individual coalition member organizations, and no separate organization has been created. Although for years the agreement between Alliance members was relatively informal, a written agreement is now in place. Supplemental agreements are created to outline the reporting responsibilities of alliance members when working together on joint grant writing. The organization acting as managing partner for any given grant is compensated for the additional work required and this compensation is written into the budget for the grant. The Alliance produces an annual plan outlining the goals and responsibilities of members. Members hold each other accountable for performance and keeping up with roles and responsibilities through open communication, and, if necessary, more concrete pressure from the group, such as threatening exclusion from future grant proposals.

Benefits of Collaboration:

- “Funders love this stuff!”
 - Less proposals
 - More confidence
- It builds the capacity of member organizations.
- Its structure and intent avoid generating competition.
- The Alliance has utilized the grant funding to protect over 17,000 acres of Mississippi River bluffs in 23 counties throughout the region.

Challenges of Collaboration

- There has been almost 100% turnover in partners’ staff and boards. Thus it has been important to focus on this evolution and on helping new personnel understand the Alliance and its member organizations.
- The Alliance is all about personal relationships, which can sometimes be an advantage and sometime a challenge.(Ackelson, 15 July 2005)

4.4 Examples of Mergers

A. Grand Traverse Regional Land Conservancy (GTRLC)/Old Mission Conservancy(OM)

- **Location:** Michigan
- **Staff:** GTRLC – 15-16 full time, 4 part time; OM – volunteer
- **Operating Budget:** GTRLC - \$1,700,000
- 115 conservation easements
- **Total Acres Protected (end of 2004):** 16,785 acres

Initial Goal of Collaboration:***Cooperative Agreement***

OM, an all-volunteer organization, was considering hiring staff. GTRLC was interested in conserving large tracts of land, and OM’s service area, Old Mission peninsula, had many large tracts of farmland. By working together they sought to build the capacity of OM through the professional staff of GTRLC, to enhance GTRLC access and relationship with land owners in OM’s service, and ideally, increase the amount of land conserved there.

Scope of Collaboration:

The relationship between GTRLC and OM began as a cooperative agreement between the two land trusts. The local land trust (OM) used the staff of the regional land conservancy (GTRLC) to advance projects, and the regional used the contacts of the local to promote its work and connect with landowners in the local trust's service area. There were dues sharing for members of both organizations, and the regional provided support for the local land trust with administration, fundraising, and membership mailings.

Merger - 2002

- After the cooperation agreement was in place, OM became less involved in land protection.
- Several members meetings led to a vote (at least 2/3) for OM to merge with GTRLC. OM assets (\$173K) merged into the GTRLC operating budget to be used for conservation on the OM peninsula only.
- Two OM Board members were offered GTRLC Board membership—one accepted, but did not stay.

Benefits of Collaboration:***Cooperative Agreement***

- Fostered a better relationship between the two organizations, making merger possible.

Merger

- Facilitated sense of joint ownership of land conservancy
- Eliminated confusion for land owners of multiple land trusts operating in overlapping service areas.
- Reduced overhead
- Cleaned up situation between OM and GTRLC legally and ethically

Challenges of Collaboration:***Cooperative Agreement***

Although the cooperative agreement between GTRLC and OM deepened their relationship and ultimately paved the way for the eventual merger, it was not in itself a mutually beneficial arrangement. GTRLC invested significant time and resources helping OM to fundraise, communicate with membership, etc. for virtually no return. Representatives interviewed reported that the initial agreement was poorly thought out and structured, leaving GTRLC frustrated and overburdened with the responsibility for raising funds that were subsequently turned over to OM.

Merger

The challenges of the merger were reportedly minimal due to GTRLC maintenance of openness and transparency on all levels to help foster understanding around the benefits of the merger. Such communication and openness was also important to gaining the trust of OM's volunteers and members that the organization's assets would be used exclusively for conservation on the Old Mission Peninsula after transferring to GTRLC. (Worthington, 24 June 2005)

4.5 Lessons for Local Collaboration Efforts

Conservation organizations around the country have benefited from building relationships with organizations that have overlapping or adjacent service areas and/or compatible scope and mission in order to share information and ideas. Developing trust and familiarity is a critical first step to laying groundwork for future collaborative endeavors among organizations. Regularly scheduled meetings are the primary vehicle for establishing such relationships. The reduction of administrative costs has been achieved to a nominal degree by partnering on individual projects and to a greater degree by using shared staff service center models or strategic restructuring. In addition, joint fundraising has frequently brought greater return to collaborating organizations.

A. Characteristics of Successful Collaborative Efforts

A range of collaborative efforts among land conservation groups across the country offer some important lessons for local organizations interested in fostering increased levels of collaboration in the region. Building stronger relationships, familiarity, and understanding among organizations embarking on collaboration is the first step toward greater cooperation in the future and is a fundamental aspect of successful collaborative efforts across all of the national models explored in this study.

In terms of structuring partnerships among organizations, national best practice research indicates that successful collaborations are based on areas of common ground, interest, and/or gain and are mutually beneficial to all involved. The following characteristics are critical to the success of any collaboration:

- Open communication is paramount.
- Building trust among collaborating organizations provides a foundation for success.
- A written agreement ensures that roles, responsibilities, and goals are well-defined and agreed upon.
- The scope, purpose, and structure of the partnership or collaboration are outlined as specifically as possible.
- The focus of the effort is on building the capacity of partner organizations, not creating competition for energy or funding.
- Participating organizations commit at a minimum to building their relationships and establishing a forum for the exchange of ideas.

B. Benefits of Successful Collaborative Efforts

Working together on a common interest or process can lead to a multitude of benefits for participating organizations and for the cause of conserving land. The organizations interviewed during the national research included the following among the benefits of collaborating:

- Reduces process and/or administrative costs
- Increases funding
- Increases support and training
- Avoids confusing land owners
- Benefits larger, more regional organizations with the grassroots neighborhood connection of smaller ones.
- Benefits smaller groups through technical resources and staff of the larger ones.
- Helps connect organizations, improves relationships, as well as their case with public and funders.
- Expands the scope of land conservation.
- Reduces competition
- Establishes a stronger, more effective referral network

C. Challenges of Collaborative Efforts

Overall, collaboration was viewed very positively by representatives of the nonprofits included in the national research component of this feasibility study. The following three challenges surfaced most prominently during the national research:

- Negotiating relationships between partners.
- Keeping written agreements and therefore the roles and responsibilities current and appropriate to collaborations as the needs and goals of participating organizations evolve.
- Establishing a shared vision as the basis or rallying point of the collaboration.

Negotiating the differing personalities of the staff and volunteers involved was the most frequently reported challenge of collaborative efforts by those interviewed. In addition, as a collaborative effort matures, the personnel involved may change, requiring ongoing work to maintain organizational relationships.

All of the organizations contacted reported that a written agreement was in place to outline the roles and responsibilities of partners, but the experience of the Michigan land trusts, GTRLC and OM, before they merged reinforces the importance of scheduling a regular review of such written agreements to ensure it remains appropriate to the relationship and partners.

Determining common ground such as overlapping service areas, common strategic or conservation goals, and/or shared benefits is important groundwork to lay for collaboration between land trusts. Initially, this may be challenging because many local organizations are focused on very specific geographic area.

5 Opportunities for Future Collaboration

5.1 Short-Term Opportunities for Greater Collaboration

In most cases, the short-term opportunities for greater collaboration among land trusts are those that are least complicated and do not involve changes in organizational structure to complete. For the local land trust community, the short-term opportunities predominantly fall into the “cooperation” category of the collaboration continuum.

A. Establish more regular/organized meeting schedule:

Establishing regular, open communication among organizations operating in the same or similar fields is one of the initial steps to identify logical, compatible collaboration points. Sharing information and developing a familiarity with each others’ personnel, projects, and goals can naturally lead to greater project-based collaboration, help avoid redundancy, and set the ground work for increased future collaborative endeavors.

In the collaboration survey completed as part of this project, local land trusts identified sharing knowledge and skills as one of the most important benefits they would hope to see from future collaboration efforts. Survey respondents also reported that an increased knowledge of local conservation efforts would be another important benefit. One of the easiest ways to begin addressing those two benefits would be to schedule quarterly meetings of all local land trusts.

Quarterly local land trust summits would strengthen relationships among these organizations, allow for regular sharing of information about projects, and provide a forum for increased training efforts. Successful future collaboration efforts will only be built and sustained if there are strong relationships among the land trusts. Because so many local organizations are all-volunteer, it is important to begin additional efforts to build relationships among board members of the land trusts involved.

At the land trust summits, organizations should have the opportunity to highlight current projects, share lessons learned, and discuss innovative ways they have been able to further their missions. This type of regular information sharing will help participating organizations to operate more efficiently and learn from each other.

Finally, the quarterly summits should be seen as a forum for training and technical assistance. Given the increased focus on land trust accreditation, it would be helpful to plan pertinent training relevant to the proposed land trust standards. This is a particular area that some of the larger organizations could champion by sharing training offered to its staff and their expertise with the larger land trust community. While the Land Trust Alliance (LTA) is planning to offer training to all members to achieve land trust accreditation, this effort will likely start with larger national organizations. Given that the accreditation standards are established, it makes sense for local organizations to begin working on achieving the organizational change that will be necessary for accreditation. For example, a locally led training initiative, like Hollow Oak Land Trust's Oak Leaf Forum, could focus on teaching best practices for baseline assessments and stewardship programs for protected land.

B. Evaluate Administrative Costs

Saving money was the primary benefit that survey respondents hoped their organizations would realize from greater collaboration efforts. Given the relatively small operating budgets of the all-volunteer organizations, it is increasingly important for these land trusts to explore opportunities to reduce the cost of such budget items as liability insurance and Directors and Officers (D&O) insurance. For insurance purposes, the Liability Risk Retention Act of 1986 gives organizations the right to form purchasing groups to buy insurance at group rates. Members of a purchasing group must be in similar or related businesses, which expose them to similar liability risks. Land trusts in Allegheny County would clearly qualify to form a purchasing group for insurance purposes.

LTA has formed a purchasing group called Conserve-A-Nation that enables LTA members to purchase a variety of insurance products at group rates. The Conserve-A-Nation program has over 500 participating organizations. In the case of D&O insurance, members of the group are able to obtain a minimum coverage policy for \$900 annually if they have assets of less than \$500,000. At this premium level, several local land trusts would be able to save money on their D&O insurance. However, given that LTA membership fees begin at \$225 annually for organizations with operating budgets of less than \$10,000, it would only be worthwhile to pursue these group rates if the organization is currently an LTA member.

It is also possible for local land trusts to form their own local purchasing group. This option would enable local organizations to obtain insurance at group rates without the additional expense of a membership fee; however, given the limited number of organizations available for such a local group, it would be unlikely to yield rates as favorable as those provided in a larger group with greater purchasing power.

While the Conserve-A-Nation program may not be able to offer savings on D&O insurance, there appears to be the potential for greater savings on general liability insurance. The Conserve-A-Nation program offered minimum policy rates for liability insurance of \$650 in 2004. Organizations will need to determine, based on their individual insurance needs, whether there are possible savings with this program. However, given that several of the smaller land trusts have substantially higher liability premiums than the group rates, there is potential for savings in this area.

In the short term, it does not appear that there are other areas to explore for administrative cost savings. Savings on other expenses like web site maintenance and newsletters would only be possible through collaboration. This is an area to explore as the local land trusts become more comfortable with greater levels of collaboration.

C. Create Structure for Future Efforts

In the short term, local land trusts could also take the time to create a framework for future collaborative efforts. Without a concrete commitment to continue working on fostering collaboration, it is probable that the issue will not receive the attention it deserves given the other obligations of board members and staff. Local land trusts should identify an organization, preferably one with full-time staff, which will be able to serve as the lead organization and coordination point for future efforts. Even the least involved collaboration efforts require planning support that will be difficult to sustain for all-volunteer organizations. To ensure that the collaboration initiative remains a group effort that is not “owned” by one organization, these land trusts should identify a steering committee comprised of representatives from several organizations. The steering group should help to set direction for the collaboration efforts, and the lead organization should be responsible for coordinating implementation of the efforts.

Finally, local land trusts should consider documenting their intent for future collaboration with a Memorandum of Understanding (MOU) to outline the role of the lead organization and the steering committee. The MOU should include minimum expectations, as well as the roles and responsibilities for organizations involved in the effort.

5.2 Mid-Term Opportunities for Greater Collaboration

The mid-term opportunities for land trust collaboration include an increased level of involvement and integration on the part of participating organizations. While the potential benefits of these mid-term opportunities are greater, they are also more complicated, require shared decision making among the land trusts, and will necessitate more staff and board member time.

A. Explore Shared Communication and Outreach Efforts

As previously discussed, one of the weaknesses of the local land conservation movement is its fragmented structure. The public may be aware of one organization working to conserve important land in Southwestern Pennsylvania, but most likely does not understand the scope of local efforts. Local land trusts have a real opportunity to improve the efficiency of their communication and outreach efforts, while simultaneously increasing their collective profile with funders, government decision-makers, and the general public. First, local land trusts could consider collaborating on a joint newsletter, which includes information about all of the important land conservation efforts occurring in the region. Such consolidation of efforts would help reduce communication expenses for some of the smaller organizations and be a more valuable means of communicating with members and other individuals committed to land conservation efforts in Southwestern Pennsylvania. Producing a joint newsletter would help to elevate the standing of land conservation within the region. Rather than having seven separate newsletters going to a variety of distinct constituent groups, recipients would have a comprehensive picture of local efforts in one publication.

A joint newsletter would help communicate a more cohesive message and still allow the flexibility to customize mailings for individual organizations. For example, participating land trusts could include an insert with important membership information, which would only be relevant to the individual membership groups.

The production and distribution of a joint newsletter for regional land trusts would need to be coordinated by one of the larger organizations that have dedicated staff time. The responsible coordinator would solicit content from each individual organization and coordinate compilation, editing, and production. In the case of a joint newsletter, sharing the mailing lists of participating organizations with non-competitive organizations like Friends of the Riverfront or the Pennsylvania Environmental Council could be an effective means of extending the network of participating land trust organizations. It could also raise general awareness about land conservation in Allegheny County among those already interested in the local environment and ecology.

Developing a shared website, which includes pertinent information for all local land trusts, is another way for these local organizations to increase their profile. A shared website could communicate a unified message about the land conservation

movement in Southwestern Pennsylvania. Currently, funders and other interested individuals must visit more than seven different web sites to have a comprehensive picture of the local land conservation work being done. One site devoted to local conservation would provide a one-stop resource for volunteers, members, interested funders, and government decision-makers. With a unified web presence, it would also be more feasible for local land trusts to increase public awareness of their work.

Since there is not a substantial amount of money spent on website design and maintenance among the participating organizations, a joint website initiative would not result in significant cost savings for any group. However, having one organization serve as a coordination point for the maintenance of a joint website is a worthwhile goal for the other reasons outlined above. Much like the joint newsletter, the coordination work involved with developing a joint website would require an organization with full-time staff to serve as project champion.

B. Share Support Staff

Another mid-term collaboration option would be for local land trusts to explore opportunities to use a shared service model similar to the Cape Cod Compact. A shared service model would allow all-volunteer organizations to pay for administrative services provided by one of the staffed organizations. The Cape Cod Compact is not a land trust itself; instead, it is a separate organization providing professional support services to members for an annual fee. While the Cape Cod Compact model may not be appropriate as a mid-term option, a modified approach would enable local organizations to achieve similar benefits.

Support services that would be appropriate candidates for a shared services model include the following:

- Grant Writing
- Grants Management
- Volunteer Coordination
- Reporting
- Project Management and Coordination
- Pre-Acquisition Due Diligence
- Stewardship
- Fundraising

Given the increased attention to best practice standards for land trusts, sharing professional staff would be an excellent way for all-volunteer organizations to take advantage of the professional expertise available to larger land trusts and conservancies. Shared staff members, with conservation expertise who are knowledgeable about the Land Trust Standards, would also be able

to reinforce standard practices for such critical processes as pre-acquisition due diligence, land acquisition, and land stewardship.

A shared service model would most likely require additional staff support for one of the larger organizations willing to take on this new role. To some extent, an hourly service fee paid by organizations that use the shared services could offset the expense for new staff. While this service fee could be a nominal amount, it would be important to set a value on the work that participating organizations receive. In addition, such a fee would mean that the beneficiaries of the new staff support will help offset the associated costs. Because the service fee would not cover the entire cost of providing administrative support services for all-volunteer organizations, it would most likely be necessary for the lead group to request operating support for this initiative. Given the local desire to see greater cooperation between organizations, a shared service model for land trusts would be a viable example for funders to support.

C. Increase Project-Based Collaboration Efforts

Although project-based collaboration is generally viewed as a cooperative venture requiring less integration from those involved, chances of success are enhanced when relationships are fairly established and participants' roles and responsibilities are outlined in a written agreement. Cooperation on individual land conservation projects is one of the most frequently occurring types of collaboration among land trusts and conservancies. Often in project-based collaboration, organizations conduct joint fundraising or development to raise money for projects, especially ones involving direct conservation of land via the purchasing of land or development rights.

As resources, especially government funding, become scarcer, funders have to ensure that their community investments are having maximum impact. Collaboration and partnering often bring the skills and resources of organizations together, streamlining the grantmaking process for funders and often increasing confidence in the organization's capacity together to deliver on proposed projects. Community fundraising can also benefit from the increased visibility and consolidation of joint campaigns. The project-based cooperation of the Blue Hill and Island Heritage land trusts in Maine and the Blufflands Alliance are two national examples, which clearly illustrate the advantages that can accompany joint fundraising. The land trusts in Maine were able to jointly raise the necessary money for purchasing 124 acres. The six partner organizations of the Blufflands Alliance have significantly increased the money they have been able to raise. Joint grant writing for collaborative conservation projects is another way that land trust work together to cultivate resources.

5.3 Long-Term Opportunities for Greater Collaboration

Finally, local land trusts have several additional options for greater collaboration that will require significant levels of integration between organizations. While these options are typically most successful after organizations have worked together and established working relationships, in several local cases there may be more immediate opportunities to explore options that require substantial integration.

A. Joint Regional Planning

Land conservation efforts in Southwestern Pennsylvania are carried out by a variety of organizations, from small community-based volunteer land trusts to a large regional conservancy. While these land trusts occasionally work together on individual projects, there has not been a regional effort to create an overarching strategy for the land conservation movement in the area. As a result, local land trusts are working on a variety of priorities, which may or may not fit into a larger regional picture. Studies by the Brookings Institute and the Pennsylvania Biodiversity Partnership indicate that Pennsylvania and the Pittsburgh metropolitan area in particular have developed more inefficiently than nearly any other area in the United States, using land at an alarming rate per person. The following findings from those studies demonstrate the importance of effective land conservation efforts in the region.

- Pennsylvania ranks second in the nation in the amount of open space converted to development. (Thompson 15)
- Fully one-third of all the land that the Commonwealth has ever urbanized since its founding was developed in just 15 recent years. (Brookings 47)
- Over those 15 years the states consumed land at a rate equivalent to 209 acres a day, or nine acres an hour, every hour. (Brookings 47)

Land trusts in Southwestern Pennsylvania could increase their visibility and improve their effectiveness by developing regional priorities to guide local conservation efforts. Through the Blufflands Alliance, six separate land trusts working along the Upper Mississippi River have established group priorities for land protection, communication, education, and fundraising. Individual organizations then develop their strategic plans to support the overarching priorities set for the region. A similar model could be used locally.

Regional planning and prioritization of land conservation efforts will enable these land trusts to have the greatest regional impact. Whether the goal is to protect a particular watershed, conserve land with special regional significance such as our wooded hillsides, or create nature corridors to connect large parcels of undeveloped land, for the most part these efforts will

only be achieved through the collective efforts of multiple organizations. While individual land trusts will continue to be free to select and pursue their own projects, a regional goal setting process will help to focus efforts and create the most strategic regional impact.

A more strategic regional approach to land conservation will also help to improve outreach and awareness of the local land conservation movement. By showing the regional importance of land conservation and explaining collective goals, local land trusts can help the public to understand why conservation matters to the region even when it extends beyond their immediate backyard. Similarly, a set of regional goals for land conservation will provide a strong message for government, foundation, corporate, and individual contributors. In grant applications, annual giving campaigns, and other fundraising efforts, local land trusts can reinforce the importance of land conservation locally and point to the regional goals that will be accomplished through continued financial support. In a region that is familiar with the drawbacks of fragmentation, an integrated, strategic approach to land conservation would send a strong positive message to funders, government decision-makers and the general public.

Finally, a more integrated approach to local land conservation efforts would enable local land trusts to approach funders to support innovative approaches to land conservation. For example, through the Cape Cod Compact, land conservation groups on Cape Cod have created a revolving loan fund to provide money for land acquisition. With a regional plan for land trust cooperation in place, funders would have additional confidence that their grants are supporting landscape scale conservation efforts.

B. Strategic Restructuring

A merger of organizations or another form of organizational restructuring, such as a parent-subsidiary relationship or a joint venture, are other options for local organizations seeking greater integration. However, there are a number of reasons that these options are probably not desirable at this point in time. Most importantly, a merger or restructuring are complex and potentially costly efforts to undertake. Because a merger would involve the transfer of land and easements to a new entity, there are legal costs associated with the transfer. In one national example, a merger was complicated because the easements held by the merging organization were legally unsound and could not be easily transferred to the larger organization without potentially losing the easement rights. Along with the potential costs, some of the other issues that need to be considered as part of a merger or strategic restructuring are outlined below:

- What is the mission of the new organization?
- Who will sit on the new Board of Directors?
- Are any involved organizations in debt? Are they financially healthy?

- Are there any outstanding or pending lawsuits that need to be considered?
- What do donors and funders think of the merger?
- Are there any endowment restrictions on a merger or dissolution?
- Will programs be improved or expanded as a result of the merger?
- How will communication be handled related to the change to funders and the public?

While mergers or other forms of strategic restructuring are complicated and sometimes costly undertakings, in certain situations they make strategic sense and are worth the investment of time and resources. In Northeast Ohio, 11 local land conservation groups decided to merge to create a regional land trust after examining ways to create a unified regional approach to land conservation. The participating organizations are pursuing a merger to create Western Reserve Land Conservancy and are currently working through a detailed due diligence process including an examination of legal and financial issues.

Frequently, mergers or other forms of strategic restructuring in the land trust community come about as a result of other cooperation efforts. In the case of Grand Traverse Regional Land Conservancy and Old Mission, their relationship began as a cooperative effort to share staff expertise. The all-volunteer Old Mission used the staff at Grand Traverse to support their projects, and Grand Traverse used Old Mission's local contacts to further their efforts. As the relationship and comfort between the two organizations developed, both land trusts realized they would be able to accomplish more as one organization than separately. Many of the short and mid-term opportunities for greater collaboration outlined in this report would foster stronger relationships between local land trusts and would help to determine whether some form of strategic restructuring is a viable option.

When merger or restructuring opportunities are considered, it will be important for the organizations involved to consider the costs and benefits involved. On the benefit side, the organizations may be able to achieve land trust accreditation more easily as one organization, or they may be able to reduce costs and direct more resources to programming. However, on the costs side they may lose momentum if they are focused on the legal and internal issues associated with an organizational change, or the cost of the restructuring may drain the organizations' resources and hinder the ability of the new organization to carry on its mission.

However, any strategic restructuring will require legal and financial counsel to ensure that the proper due diligence is completed.

5.4 Summary of Collaboration Options

| <i>Collaboration Option</i> | <i>Potential Benefits</i> | <i>Risks</i> | <i>Capacity Requirements and Pre-Requisites</i> |
|--|---|---|---|
| <i>Establish Regular, Planned Communication</i> | <ul style="list-style-type: none"> • Information sharing between organizations • Learning from partners' successes and difficulties • Creates a forum for joint training efforts and problem solving • Helps to energize staff and volunteers • Sets the groundwork for future cooperation | <ul style="list-style-type: none"> • Without a champion, the effort is likely to fade away. As a result, organizations may have a negative impression of collaborative efforts | <ul style="list-style-type: none"> • One organization (preferably with full-time staff) that is able to coordinate the effort • Interest among participating organizations • This effort could be accomplished without additional staffing |
| <i>Evaluate Administrative Costs</i> | <ul style="list-style-type: none"> • Generates more money available for program activities | <ul style="list-style-type: none"> • Potential to waste staff and volunteer time for a relatively small savings | <ul style="list-style-type: none"> • Other collaborative efforts such as a shared service model or restructuring will be required to drive substantial administrative cost savings |
| <i>Create Structure for Future Efforts</i> | <ul style="list-style-type: none"> • Provides a foundation for focusing on opportunities for future cooperation • Helps to avoid confusion over roles | <ul style="list-style-type: none"> • Potential to get weighed down with administrative details | <ul style="list-style-type: none"> • Sample Memorandums of Understanding (MOUs) from other land trust cooperation efforts |

| <i>Collaboration Option</i> | <i>Potential Benefits</i> | <i>Risks</i> | <i>Capacity Requirements and Pre-Requisites</i> |
|--|--|---|--|
| <i>Share Communication and Outreach Efforts</i> | <ul style="list-style-type: none"> • Provide more consistent communication to members, funders, government decision-makers • Reduce staff time and expense associated with individual mailings | <ul style="list-style-type: none"> • Individual organizations do not receive the same recognition if not performed properly • All-volunteer organizations do not provide regular content • The coordination and administrative work required take away too much time from program activities | <ul style="list-style-type: none"> • One organization to coordinate compilation and publishing • Depending on the number of organizations participating and the frequency of joint publications, this could require additional staffing for a coordinating organization • Participating organizations that are committed to providing regular, up-to-date information • A structure that allows for organizational creativity and individuality • A written Memorandum of Understanding |

| <i>Collaboration Option</i> | <i>Potential Benefits</i> | <i>Risks</i> | <i>Capacity Requirements and Pre-Requisites</i> |
|---|--|--|---|
| <i>Share Support Staff</i> | <ul style="list-style-type: none"> • Volunteer organizations have access to knowledge and skills of professional staff • Organizations start using similar approaches to activities like pre-acquisition due diligence and stewardship • Organizations are more easily able to meet LTA standards and become accredited • Reduction of staffing and administrative costs | <ul style="list-style-type: none"> • All-volunteer organizations may use more services than they pay for • The coordinating group loses focus on their own programs • Arrangement creates friction because of missed expectations | <ul style="list-style-type: none"> • One organization with professional staff and office space required to coordinate • Additional staff support for administrative and coordination support • Business plan that demonstrates how increased staffing needs at service organization are financially sustainable • An MOU or membership agreement that delineates roles and responsibilities of involved organizations • Seed money from funder to help initiate the effort |
| <i>Increase Project-Based Cooperation Particularly Joint Fundraising</i> | <ul style="list-style-type: none"> • Participating organizations are able to have a greater impact • Reduced costs • Reduced duplication of efforts • Funders interested in collaborative efforts are more willing to support such efforts | <ul style="list-style-type: none"> • Confusion over roles and responsibilities • Greater need for financial accountability and control | <ul style="list-style-type: none"> • Clear definition of roles and responsibilities of involved organizations • An itemized budget that delineates contributions required from involved organizations |

| <i>Collaboration Option</i> | <i>Potential Benefits</i> | <i>Risks</i> | <i>Capacity Requirements and Pre-Requisites</i> |
|---------------------------------------|--|---|--|
| <i>Joint Regional Planning</i> | <ul style="list-style-type: none"> • Greater communication between organizations • A common set of priorities for land conservation • A more targeted message for funders, government decision-makers, and other interested parties • Improved regional conservation efforts | <ul style="list-style-type: none"> • Issues important to local constituencies are not adequately represented • Grassroots strength of land conservation efforts is diluted | <ul style="list-style-type: none"> • Grant support required to complete an inclusive regional planning effort • Structure to evaluate and report on progress against regional priorities • Support and participation of staffed organizations: Western Pennsylvania Conservancy, Allegheny Land Trust, Hollow Oak Land Trust |
| <i>Strategic Restructuring</i> | <ul style="list-style-type: none"> • Reduced duplication of efforts • Greater operational efficiency • Increased ability to achieve mission | <ul style="list-style-type: none"> • Legal issues surrounding transfer of land or easements • Cost associated with professional advisors required to support the merger efforts • Different cultures do not integrate well • Mission and priorities of involved organizations do not align • Unforeseen legal or financial complications • Preoccupation with restructuring takes focus from mission and programs | <ul style="list-style-type: none"> • Legal and financial expertise required to perform pre-merger due diligence • Grant support to offset some of the one-time costs associated with due diligence and other preparation activities • A foundation of trust between the involved organizations • At least one involved organization with full-time staff to support the newly created or expanded organization |

5.5 Next Steps

Local land trusts have numerous options for greater cooperation ranging from sharing information at quarterly summits to merging organizations in order to form consolidated regional land trusts. As previously mentioned, the short-term effort of land trusts should focus on low-risk activities that bring benefits to all participating organizations. However, the ultimate decision of which collaboration options to pursue will be dependent on the organizations that wish to be involved and the level of comfort with greater integration among participating organizations.

To maintain the focus on collaborative efforts and generate additional momentum, the local land trust community should consider the following steps:

1. Initiate a series of planning meetings to discuss the report, set priorities, and lay the groundwork for continued collaborative work. The steering committee for the collaboration feasibility study could assist with coordination and planning for the meetings. At the initial meetings, participating land trusts should focus on accomplishing the following objectives:
 - Form a representative steering committee to encourage and coordinate future efforts
 - Set common goals and priorities to guide collaboration efforts
 - Schedule regular meetings to share training and information
 - Select and agree upon “quick hit” opportunities for organizations to work together for mutual benefit
2. Identify designated volunteer or staff resources that can be used to support coordination of future efforts.
3. Explore funding to support future collaborative efforts. Several local foundations focus on grantmaking to environmental organizations. Of the collaborative options outlined in the report, local foundation support is most well-suited to the following: providing capacity-building and operational support to coordinate the land trust collaborative efforts; supporting regional planning efforts; and providing start-up analysis and assistance for the shared service center model.

6 Appendix

6.1 References

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