

Collaborative Conservation and Multi-Parcel Land Protection Projects (Part 1): Are You Ready to do Aggregation?

Presentation by Steven Thor Johnson, New England Forestry Foundation given at the 2012 Regional Conservation Partnership Gathering on November 13, 2012 in Concord, NH

Notes taken by Max Middleton

Foundations goals:

- Conserve forest land
- Promote sound stewardship
- Catalyze work of bringing interests together through RCPs, etc

Aggregation is multi-parcel and leverages private and public investments.

What is Aggregation?

- Partnerships are established among several conservation organizations and agencies across a defined landscape
- Collaborative work to raise acquisition funds and complete conservation easements
- Relationships are sustainable with forest landowners to encourage and support good stewardship
- Land Trusts build capacity to ensure perpetual stewardship of conservation easements

Aggregations has advantages

- Conservation is accelerated
- Competition is reduced
- Easement documents are standardized, ensuring that they are in most current accepted legal form and easier to steward
- Stewardship programs are strengthened and funded

Aggregation ingredients

- Capable land trusts, partners
- Trusting, resilient collaboration
- Entrepreneurial leadership
 - Central driver – this can be difficult to negotiate
- Great communication
- Commitment to excellence
 - Cannot compromise quality for speed – the outcome should be greater than the mere sum of two parts

Are you ready for aggregation?

- Taking stock of your organization
- What's your experience?

- Who else cares, shares your vision?
- What does collaboration entail?
- How can you prepare for this?

Taking stock

- Do you have:
 - o A clear mission
 - It's important to make sure the language is clear – especially as it is stated in the by-laws
 - Is it clear, is it about conservation?
 - o Service area?
 - It's important to define your scale, geography
 - o Conservation plan?
- Why are these important?
 - o Know what you need
 - o What you can contribute
 - o How to measure the benefits of your mission
 - There needs to be some way to gauge outcomes

Project Experience

- What types of projects?
 - o How flexible is your land acquisition policy?
- How do you staff these efforts?
 - o Does your staff meet your needs
- Why these Questions?
 - o Need to assess your deal capacity
 - Especially if we are to meet the [Wildlands and Woodlands](#) goals
 - o What are the potential gains from collaboration?

Question: If you don't have capacity (capital) to do deals, how do you know when it's right to expand?

- Depends case to case.
- Sometimes mergers may be right

Fundraising Experience

- How do you fund conservation, including:
 - o Due diligence
 - o Baseline reports
 - o Legal services
 - o Negotiations
 - o Purchase price
 - o Stewardship fund contribution?
 - o Do you have operating reserves (how many months of operating reserves do you have)?

- Especially with economic instability, low reserves can lead to frightening situations

Once you've taken internal stock...

Look around:

- Do you have like-minded land trusts in your neighborhood?
- Is there one or more regional land trusts covering a landscape that includes several local land trusts' service area?
- Why these questions
 - We should determine if there is a region of interest for collaboration that is resource based, **AND** congruent with potential partners' services

Actually partnering up

- Have you worked in a formal or informal partnership with other land trusts? For what reasons?
- Who was the initiator/ provided leadership?
 - How did those roles change?
- How did you manage the funds needed to accomplish your joint project/s?
- What worked well? What did you learn?
- What would you do differently going forward?

Aggregation is an instance of collaboration:

What is aggregation?

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Aggregations has advantages

- Conservation is accelerated
- Competition for funds is reduced
- Easement documents may be standardized, ensuring that they are in most current accepted legal form and easier to steward
 - This can be a huge time and resource saver
- Stewardship programs are strengthened and funded

Q: How do you know if you have "aggregatable" land? How do you know to take that big first step in exploration?

A: You have a strategic plan and a focus area: Depending on what your goals are, you choose parcels to focus on

Q: How can you jump start learning something about landowners' intentions?

A: Cup of coffee. Or, find a partner operating at a very local level, who really knows the landowners and their intentions. Don't underestimate the local political sway of foresters.

Challenges

- Contacting / qualifying landowners.
- Be personable, make it personal

From a business perspective, how do you know when to make a move – how do you really know if there is willingness?

Aggregation Ingredients

- Capable Land Trusts
- Trusting, Resilient collaboration
- Entrepreneurial leadership
- Great Communication
- Commitment to excellence

Being able to tell a story is an important marketing tool.

Filling in the gaps:

- Training
- Staff
- Operating funds
- Project capital
- Something else?

Where will you get the support?

- YOU NEED YOUR BOARDS SUPPORT

Concerns:

When working with a larger partner, how can you be sure your group does not become obsolete?

When are you a land trust and when are you a policy group? How do you make that decision? There are no right answers?

What about aggregation with organizations that have different visions for land use?

A: There has to be clarity in regards to the purpose of collaboration in a specific incident. Two groups with distinct visions may share some smaller objectives, and it may be mutually beneficial to work together in some cases.

There are competing public visions, and there are competing private interests – it's important when collaborating to be clear about objectives small and large. When you can get it in writing, that's even better.

What about working with non-traditional partners (i.e., private business, utilities, foresters)

Q: How do you deal with “the hole in the donut” – when there is one stubborn landowner in the middle of the willing?

A: Go one by one and try to put pressure on the loner.