

Collaborative Conservation and Multi-parcel land protection projects

**Stephen Thor Johnson
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Evaluating your Readiness
and Building Capacity for
Aggregation

Aggregation has several key components:

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

Aggregation has several distinct advantages

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

Aggregation Ingredients

- Capable land trusts
- Trusting, resilient collaboration
- Entrepreneurial leadership
- Great communications
- Commitment to excellence

Are you ready for aggregation?

- Taking stock of your organization.
- What's your project experience?
- What's your fundraising experience?
- Who else cares about your mission that you might partner with?
- What does collaboration entail?
- What can you do to be better prepared for collaboration and aggregation?

Taking stock

Do you have:

- Clear mission?
- Service area?
- Conservation plan?

Why are these important?

- Know what you need
- What you can contribute
- How to measure the benefits to your mission

Project experience

What project experience does your organization have?

- Types of projects?
- How do you “staff” these efforts?
- Do you have more opportunities than “staff”, or the opposite?

Why these questions?

- Need to assess your deal capacity
- What are the potential gains from collaboration?

Fundraising experience

How do you fund land conservation,
including:

- due diligence,
- baseline reports,
- legal services,
- negotiations,
- purchase price,
- stewardship fund contribution?

Do you have operating reserves (how
many months)?

Looking 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 areas?

Why these questions?

We should determine if there is a region of interest for collaboration that is resource based, AND congruent with potential partners’ service area.

Partnering up

- Have you worked in a formal or informal partnership with other land trusts? For what reasons?
- What organization initiated and/or provided leadership?
- 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?

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Filling in the gaps

- Do you need:
 - Training?
 - Staff?
 - Operating funds?
 - Project capital?
 - Something else?
- Where will you get these resources?
- Do you have board support?

Open Discussion

- Have you participated in collaborative conservation projects with other land trusts and/or public agencies?
- What were you able to accomplish together that you couldn't accomplish on your own?
- What capacity did you need to participate fully?
- What capacity did the partnership add?
- What worked well? Not so well?
- Is there an inherent difference between collaboration for delivering programs, and collaborative land transactions?
- Can experience collaborating delivering programs build a foundation for collaborating on land deals? How?

Thank You!

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The Aggregation Toolbox

*Resources for Accelerating
Land Conservation*

The Status of Conservation

- How are we doing?
- What might the landscape look like in 50 years?
 - At current rates of conservation and development?
 - If we meet the W+W goals?.
- How might we invent new ways of conserving land that could better achieve this vision?
- Priorities, efficiencies, less competition, more resources.

Let's get into gear!

- Aggregation!
- Every region has unique assets and challenges.
- Essential elements of successful, multi-parcel collaborative conservation programs with diversified funding sources.
- Focus on common strategies and tools for success, rather than try to offer the definitive “recipe”.
- New England Forestry Foundation is developing an “Aggregation Toolkit” of these strategies and tools, plus links to other resources that support collaboration.
- We need your questions and your experience to help advance the state of the art in collaborative conservation.

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Why is collaboration rare?

“The short answer is that collaboration is dangerous. Inherently, collaboration says something is happening outside of one’s immediate control. This by itself seems threatening to some, but there are several specific reasons why it appears dangerous.”

- **1. Not knowing the answer.**
- **2. Unclear or uncomfortable roles.**
- **3. Too much talking, not enough doing.**
- **4. Information (over)sharing.**
- **5. Fear of fighting.**
- **6. More work.**
- **7. More hugs than decisions.**
- **8. It’s hard to know who to praise and who to blame.**

Nilofer Merchant, Harvard Business Review.

http://blogs.hbr.org/cs/2011/12/eight_dangers_of_collaboration.html

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Shaping your RCP for Aggregation

- Define your region.
- Create a vision.
- Develop commitment to shared conservation and fundraising.
- Identify and address leadership.
- Understand and clarify the role(s) and responsibilities of the convening organization.

12 Rivers Collaborative

Our Vision

Our vision is a network of conserved lands that protects the midcoast's ecosystems and ensures multiple human benefits for generations to come.

Our Mission

The mission of the 12 Rivers Collaborative is to accelerate conservation of the forested landscape from the Kennebec to the St. George with the goal of doubling the amount of protected lands.

Currently, of the 825,000 acres in the 12 Rivers Collaborative area, approximately 45,000 acres are conserved.

Who We Are

- Boothbay Region Land Trust
- Damariscotta Lake Watershed Association
- Damariscotta River Association
- Georges River Land Trust
- Kennebec Estuary Land Trust
- Maine Coast Heritage Trust
- Medomak Valley Land Trust
- Pemaquid Watershed Association
- Sheepscot Valley Conservation Association
- Sheepscot Wellspring Land Alliance

Contact Us

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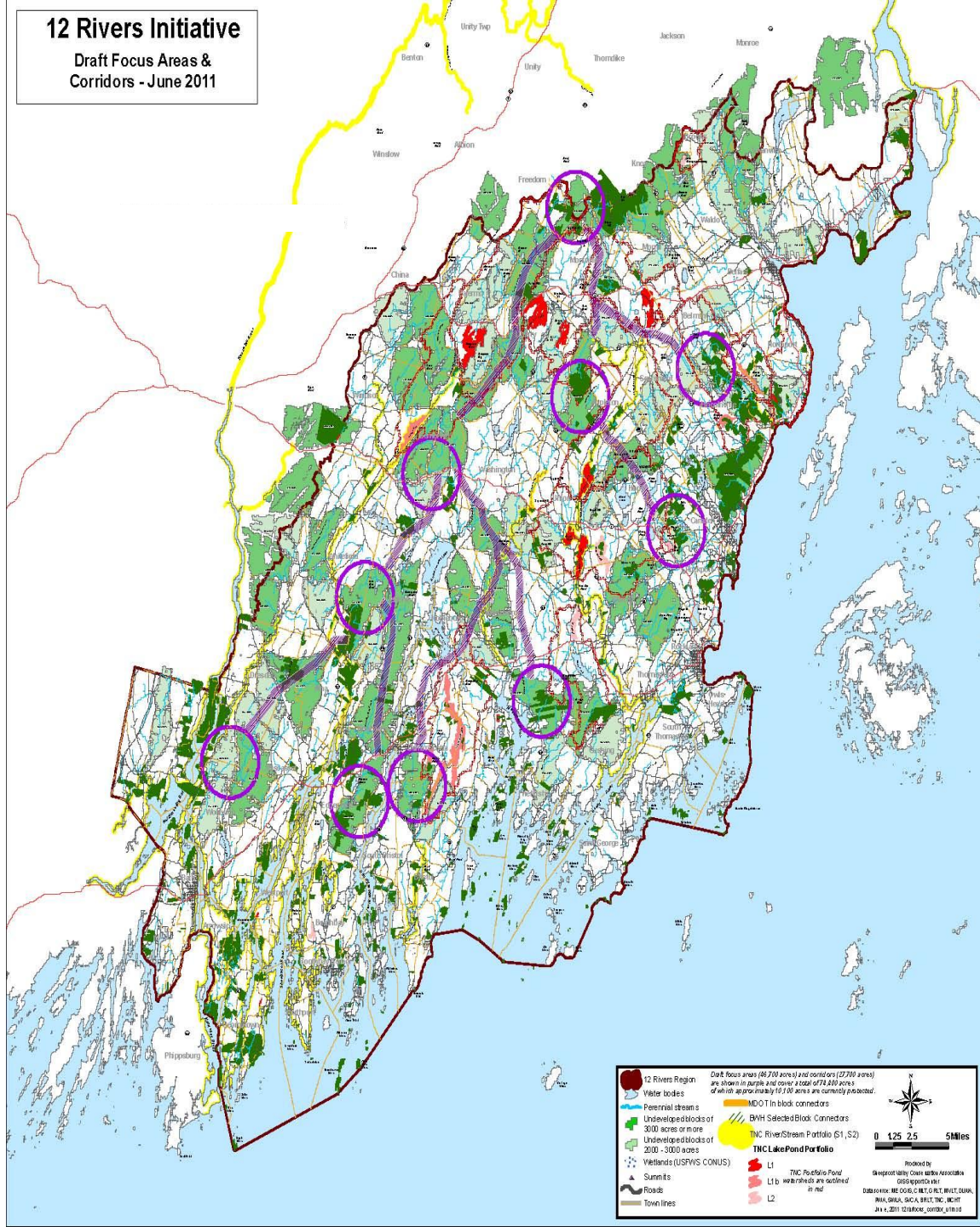
Our Conservation Goals

1. Maintain and promote biodiversity, meaning the diversity of genes, species and ecosystems, as well as the evolutionary and functional processes that link them.
2. Promote connectivity of large habitat blocks.
3. Support wildland habitat protection and working lands conservation across the landscape, for example managed woodlands and community forests, since forests are key to clean air and water quality, local resource based economy, traditional recreational uses such as hiking, fishing, hunting and snowmobiling, as well as regional biodiversity.
4. Integrate regional outdoor trails and other recreational opportunities.

Setting joint priorities

- What is the problem that you will address?
- What resources are of concern to your collaborative: forest, habitat, watershed, farmland, recreation?
- Create a regional conservation plan.
- Identify what types of properties and specific landowners you should target to implement your plan.

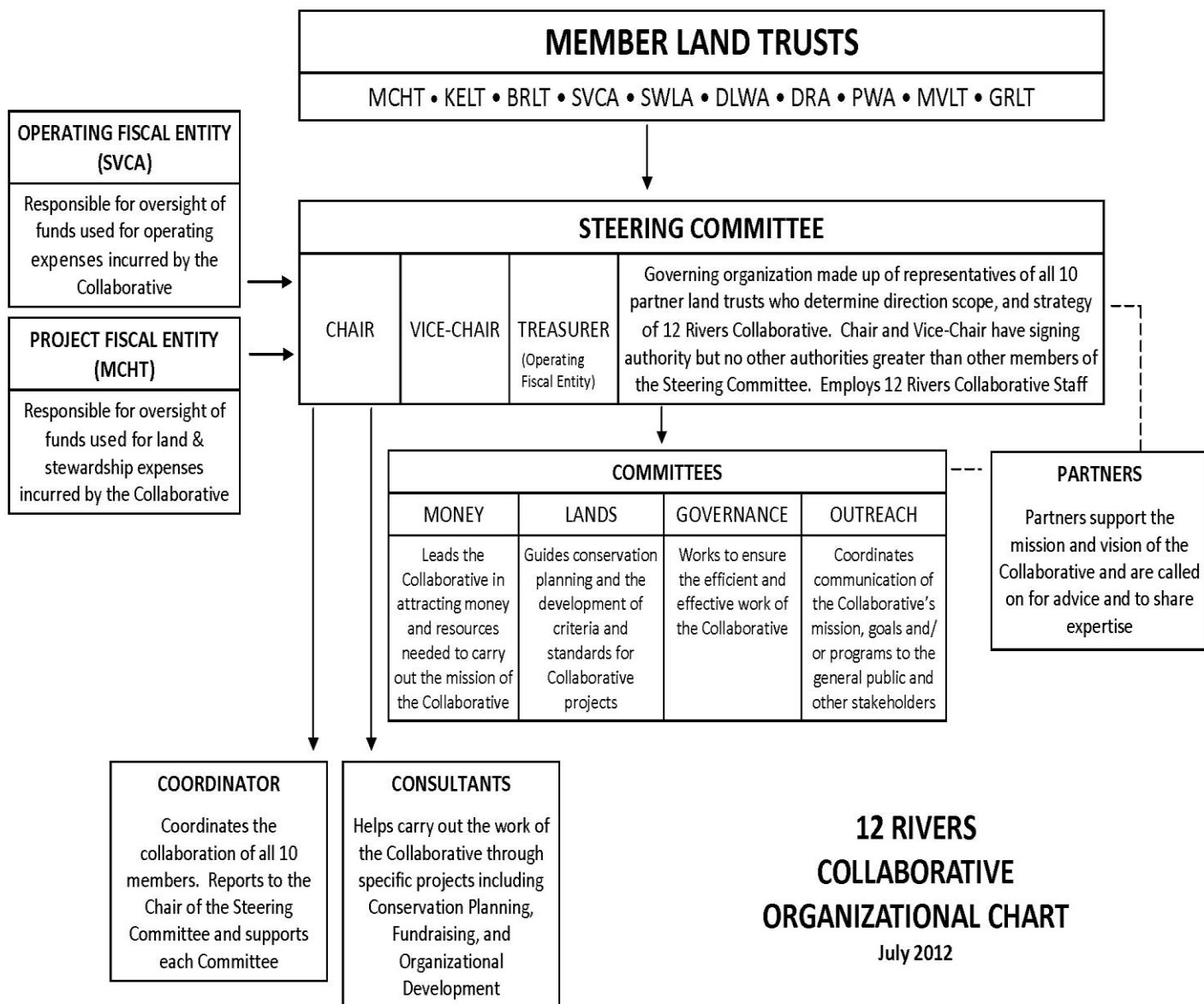
**Draft Focus Areas &
Corridors - June 2011**



Drafting and adopting the agreements

- Memorandum of Understanding (MOU)
- Memorandum of Agreement (MOA)
- Project criteria and tracking database
- Fiscal management agreements

Why are these important?



Our vision is a network of conserved lands that protects the midcoast's ecosystems and ensures multiple human benefits for generations to come.

Engaging landowners by teaming up with consulting foresters.

- Local and regional consulting foresters are potential partners in identifying landowners with an interest in conservation.
- Many of the forester's clients will have a long history of good stewardship and are recognized as leaders in their communities.
- Securing the participation of these folks can broaden the project's appeal and acceptance.

Use a standard conservation easement?

- Working woods
- Forever wild
- Watershed protection

If not, why not?

- Enhances clarity in communications
- Provides for greater efficiency
- Simplifies stewardship

See: Drafting Guidelines for Working Forest Easements Funded by the Land for Maine's Future Program.

Include “Fee Simple” acquisitions?

- Will the resource receive better stewardship, compared to private ownership under CE?
- What is the price (cost) differential?
- Is there resistance to loss of tax revenues?
- How do you judge the cost/benefit tradeoffs?
 - More public access?
 - Income opportunities for the land trust?

New models for due diligence and saving money

Standardization and efficiency in:

- Appraisals
- Negotiations
- Legal services
- Baseline documentation
- Easement monitoring

Yields more secure options with
landowners

Project Funding Decisions

Options:

- Landowner discount (bargain sale)
- Local fundraising (all sources)
- Public funding (municipal, state, federal)
- New sources (large foundations, PES, carbon credits, etc.)

Collaborative Fundraising

Benefits:

- Create more comprehensive project
- Promotes sharing and learning
- Attract bigger grants and larger funders
- Avoid duplication
- Give funders better ROI
- Realize efficiencies
- Increase credibility

Collaborative Fundraising

Challenges:

- Conflicts
- Time Consuming to Coordinate
- Complicated Financials
- Less flexibility
- Finite funding sources

Raising the funds

- Draft case for support
- Feasibility prospect identification
- Interviews and feasibility report
- Campaign Cabinet
- Timeline/Phases
- Final Case for Support
- Lead Gift
- Publicity at Launch
- Quiet Phase

Administering the funds

- Allocating funds fairly
- Funding related costs, including organizational overhead
- Fiscal agent fee

Closing projects

- Maintaining or enhancing quality
- Ensuring fiscal accountability
- Providing for long term stewardship

Refining the process

- What are your milestones and decision points?
- MOA
- Conservation plan
- Case statement
- Feasibility study findings
- Landowner agreements
- Capital campaign results
- Phase I projects completed
- Proceed to Phase II?

Evaluating success

- What are the appropriate measures?
- Bucks and acres
- Percentage of focus area conserved
- Acres covered by forest management plan by professional forester
- Happy landowners
- Happy community

What if you don't continue?

- Assessing the pros and cons
- Describing the benefits
- Communicating with landowners, donors, community
- What happens to the RCP?
- Are there important reasons to continue, if not doing collaborative land transactions?

Open Discussion

- Is it important ***to you*** that forest conservation in New England accelerates? Why? How would you explain this to a 4th grader, or a retired person?
- What approaches have you been involved with? What strategies do you think might be most effective?
- Do you have good working relationships with consulting foresters in your region? How have they participated in advancing your conservation work? What potential lies untapped?
- What other sort of landowner outreach has proven to be especially effective for your organization?

Open Discussion

- Collaborations often involve organizations of different size and capacity. What issues has this raised and how have you dealt with them?
- What challenges have you faced in selecting a fiscal agent? How did you resolve these questions?
- What strategies have you employed to minimize competition for funding? What suggestions do you have?
- Have you tried to raise a significant fraction of the capital from individuals? What did you learn and how did that affect your work?
- How might we ensure both that the pace accelerates ***and*** the quality of projects is enhanced?

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