

NOVEMBER 4, 2013

# Northwest California Durable Collaboration



## COHORT MEETING SUMMARY OCTOBER 21, 2013



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**Northwest California  
Durable Collaboration Cohort Meeting  
October 21, 2013**

**Overview**

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Representatives from six local land trusts met for an all-day retreat at the Humboldt Area Foundation. The meeting was intended to launch a series of retreats to explore collaboration among the groups. The NW California cohort is a part of a national initiative led by Solid Ground Consulting. The initiative grew out of discussions with conservation leaders all over the country.

Unlike other nonprofit organizations, land trusts have the challenge of perpetual land stewardship and we need to be planning for our organizations to be “perpetual” as well. Securing the financial and professional resources to be permanently sustainable is a daunting task; most land trusts do not have those capabilities now. Collaboration offers a way to address this by building individual and collective capacity for groups that are willing to roll up their sleeves together.

The NW California Cohort is the first of four or five such groups forming across the country and will serve as the pilot study for this national initiative. The project is being supported primarily by the S.D. Bechtel Jr. Foundation and individual members of the cohort. The initiative will:

- Identification of opportunities for partnership with other land trusts and conservation-oriented organizations in the region that will expand regional capacity
- Exploration of ways to build organizational capacity through shared resources
- Exploration of ways of turning competition for regional resources into collaborative uses of those resources
- Strengthening relationships and building trust with other land trusts and allied conservation organizations in the region
- Examination of the full spectrum of possibilities from collaborative projects to outright mergers
- Identification of specific opportunities and potential partnerships that might be appropriate
- Beginning the process of establishing collaboration agreements with action steps

### Overview of the Day

The meeting of the cohort began with introductions of the representatives present. The following representatives were in attendance:

- Carol Vander Meer, Friends of the Dunes
- John St. Marie, Friends of the Dunes
- Susan Orlenias, Jacoby Creek
- Bob Wunner, Jacoby Creek
- Ben Morehead, Trinidad Coastal Land Trust
- Susan Elliott, Trinidad Coastal Land Trust
- Betsy Watson, Sanctuary Forest
- Judy Haggard, McKinleyville Land Trust
- Nancy Correll, McKinleyville Land Trust
- Martha Spencer, Northcoast Regional LT
- Sarah Pilkington, Northcoast Regional LT

Following introductions, a brief video of a TED talk by Seth Godin “The Tribes We Lead” was presented. The video can be viewed at <http://www.youtube.com/watch?v=uOGYr9bnktw>. The purpose of the presentation was to help facilitate a bigger view of the work we all do in land conservation and to move us from “I” to “We”. The impact we make expands as we expand our tribe to leverage the capacity out there.

The combined capacity of the six land trusts in the cohort is significant as described below:

Organization:	Sanctuary Forest	Trinidad Coastal	McKinleyville Land Trust	Jacoby Creek Land Trust	Northcoast Regional LT	Friends of The Dunes	Total
Years in Operation	26	35	19	21	13	20	134
Acres Protected	10,000	60	117	400	25,000	128	35,705
Annual Budget	\$800,000	\$12,000	\$15,000	\$80,000	\$400,000	\$128,000	\$1,435,000
Staff FTEs	7.5	0	0	2	4	3.75	17.25
No. of Volunteers	50	12	36	200	55	75	428
Members		150	70	1500		800	2520
Donors		75		50	300	535	960
Mission							

In the afternoon, the cohort worked through four questions to begin to explore each type of collaboration more fully. The answers to the four questions follow. Red stars were used to identify the ones that resonated most with individual members of the cohort.

### ***1. What are the biggest threats to your organization being here and successful in 2063?***

- Funding (accreditation required?) ★★
- Succession / leadership ★★★★★
- Climate change / rising sea level / local population increase ★★
- Economic shifts (marijuana cultivation and legalization) ★★★★★★★
- Overlapping services (being needed and relevant)
- Maintaining relationships – generations with landowners
  - ◆ Transitions
  - ◆ Perpetuity
  - ◆ Competition for resources globally and locally
  - ◆ Politics
- Burn out ★
- Educating leaders ★
- Misinformation by critics ★
- Cultural changes: increasing poverty ★
- Legal challenges ★★
- Change in demographics and conservation values ★
- Dysfunctional and unstable society ★
- Next generation involvement ★

**2. List as many forms of collaboration as you can think of and their various advantages and disadvantages.**

IDEA	ADVANTAGE	DISADVANTAGE
<ul style="list-style-type: none"> <li>■ Shared staff ★                             <ul style="list-style-type: none"> <li>◆ GIS mapping ★★</li> <li>◆ Bookkeeping ★★★</li> <li>◆ Fundraising ★</li> <li>◆ E.D.</li> <li>◆ Graphic design ★★</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>■ Saves money</li> <li>■ More services</li> <li>■ Share paperwork</li> </ul>	<ul style="list-style-type: none"> <li>■ Proprietary ★</li> <li>■ Loyalty split</li> <li>■ Concentrated liability</li> </ul>
<ul style="list-style-type: none"> <li>■ Shared office ★★★                             <ul style="list-style-type: none"> <li>◆ Document storage ★</li> <li>◆ Office space</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>■ Saves money</li> <li>■ Documents organized</li> </ul>	<ul style="list-style-type: none"> <li>■ Loss of identity</li> <li>■ Proximity / location</li> </ul>
<ul style="list-style-type: none"> <li>■ Shared equipment ★★                             <ul style="list-style-type: none"> <li>◆ Vehicles</li> <li>◆ Work tools</li> <li>◆ Office equipment</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>■ Money savings</li> <li>■ Space savings</li> </ul>	<ul style="list-style-type: none"> <li>■ Disproportionate use</li> <li>■ No access when needed</li> <li>■ Maintenance?</li> </ul>
<ul style="list-style-type: none"> <li>■ Shared brainstorming ★                             <ul style="list-style-type: none"> <li>◆ Focused scheduled meetings ★</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>■ Communications</li> <li>■ Partnership</li> </ul>	<ul style="list-style-type: none"> <li>■ Time sink</li> </ul>
<ul style="list-style-type: none"> <li>■ Shared forum for dedicated work space (for writing, etc.)</li> </ul>		
<ul style="list-style-type: none"> <li>■ Shared training ★★★★★</li> </ul>	<ul style="list-style-type: none"> <li>■ Education ★</li> </ul>	
<ul style="list-style-type: none"> <li>■ Education and outreach ★★★★★</li> </ul>	<ul style="list-style-type: none"> <li>■ Publicity for all ★</li> </ul>	
<ul style="list-style-type: none"> <li>■ Volunteer Coordination ★★</li> </ul>		
<ul style="list-style-type: none"> <li>■ Collaborative grant writing ★★</li> </ul>		<ul style="list-style-type: none"> <li>■ Hard to schedule</li> </ul>
<ul style="list-style-type: none"> <li>■ Joint organizational planning</li> </ul>	<ul style="list-style-type: none"> <li>■ Vision sharing</li> <li>■ Annual board meetings</li> </ul>	
<ul style="list-style-type: none"> <li>■ Shared local strategic conservation plan ★★★★★★</li> </ul>	<ul style="list-style-type: none"> <li>■ More with less political clout ★★</li> <li>■ Better regional coordination</li> </ul>	
<ul style="list-style-type: none"> <li>■ Geographic exchange trips for schools, etc. ★</li> </ul>	<ul style="list-style-type: none"> <li>■ Expands community interest and awareness ★★</li> </ul>	
<ul style="list-style-type: none"> <li>■ Shared monitoring</li> </ul>	<ul style="list-style-type: none"> <li>■ Get it done</li> <li>■ Save money</li> </ul>	<ul style="list-style-type: none"> <li>■ Difference in standards</li> </ul>
<ul style="list-style-type: none"> <li>■ Clearinghouse for events and website</li> </ul>	<ul style="list-style-type: none"> <li>■ One stop for public</li> </ul>	<ul style="list-style-type: none"> <li>■ Takes coordination</li> <li>■ Differences of opinion</li> </ul>
<ul style="list-style-type: none"> <li>■ Joint memberships</li> </ul>	<ul style="list-style-type: none"> <li>■ Expand members</li> </ul>	

**3. What kind of staff positions would be most beneficial to share? What are the hurdles to sharing staff?**

<b>Staff Position</b>	<b>Hurdles</b>
<p>Business services ★, bookkeeping                      ★★ Outreach, events workshops, professional, legal groups                      ★★ Monitoring and stewardship                      ★ Grant writing                      Fundraising – define? Unrestricted. NOT INITIALLY!                      ★★ Media                      ★★ GIS and mapping                        ★★ Volunteer coordinator                      Exposure to different models, ideas – benefit sharing                      ED? NO!                      Contract services – enough work?                      Experts                      ★★ NCRLTC – role?</p>	<p>Common place location                      Differences in mission, location, program, loyalty                        Not a win-win                      Different staff standards                      ★ Different organizational budgets and culture                        ★★ Loss of local identity                      ★ Supervision of staff – who is ultimate manager?                      Shared responsibility of failure                      Equitable time-share and responsibility</p>

<b>Most Beneficial Staff Share</b>	<b>Possible Issues</b>
<p>Development Director                      Accountant ★★★★★                      Monitoring ★                      GIS mapping ★★★★★                      Media and publicity ★★★★★                      Volunteer coordinator ★★★★★                      Office / records space ★★★★★</p>	<p>Accountant – confidentiality issues?                      Volunteer coordination – too many people for one person?                      Perceived loss of organizational cultural identity</p>

**4. Merger:**

**a. Why would two organizations consider merger?**

**b. What are hurdles and disadvantages?**

<b>Why Merge?</b>	<b>Merger Hurdles</b>
<ul style="list-style-type: none"> <li>■ Increase efficiency (i.e., do more with less)</li> <li>■ Bigger impact ★★★★★</li> <li>■ Avoid overlap</li> <li>■ Expands “potential” geographically and economically ★</li> <li>■ Increase resiliency; less staff and board burnout ★</li> <li>■ More impressive statistics</li> <li>■ Strength from diversity (i.e., hybrid vigor)</li> <li>■ New or “fresh” ideas</li> <li>■ Increase skill set</li> <li>■ One is failing or not meeting goals</li> <li>■ Common missions and goals means more success</li> <li>■ Increased capacity from synergy ★★</li> <li>■ Adjacent lands</li> <li>■ Increase profile</li> <li>■ Fresh energy</li> <li>■ Clearer understanding of organization by general community ★</li> <li>■ Better retention of staff ★</li> </ul>	<ul style="list-style-type: none"> <li>■ Risk of more work and fewer people; less productivity</li> <li>■ Loss of local identity ★★</li> <li>■ Loss of institutional memory</li> <li>■ Alienate donors and local community</li> <li>■ Hurt feelings ★</li> <li>■ Complexity of communications ★</li> <li>■ Complexity of resource allocation ★</li> <li>■ One brings the other down</li> <li>■ Loss of focus</li> <li>■ Too much work ★</li> <li>■ Requires paid staff ★</li> <li>■ Requires cooperation and time</li> <li>■ Whose mission dominates? Is one more important than the other? ★★</li> <li>■ Legal challenges to change</li> <li>■ Would monitoring of smaller easements become less important?</li> </ul>

## Organizational Interests

Each of the organizations identified areas that seemed most promising to explore.

<b>Jacoby Creek Land Trust</b>	<ul style="list-style-type: none"> <li>■ Shared training</li> <li>■ Shared Conservation strategic planning</li> <li>■ Shared volunteer coordinator</li> </ul>
<b>Sanctuary Forest</b>	<ul style="list-style-type: none"> <li>■ GIS mapping</li> <li>■ Monitoring and monitoring training</li> <li>■ Outreach to educate about land trusts and conservation easements</li> </ul>
<b>Northcoast Regional Land Trust</b>	<ul style="list-style-type: none"> <li>■ Shared staff: GIS/mapping, bookkeeping</li> <li>■ Shared office</li> <li>■ Shared volunteer coordinator</li> <li>■ Shared outreach and education</li> </ul>
<b>McKinleyville Land Trust</b>	<ul style="list-style-type: none"> <li>■ Shared office space and records storage</li> <li>■ Joint fundraising efforts</li> <li>■ Shares staff position(s)?</li> </ul>
<b>Friends of the Dunes</b>	<ul style="list-style-type: none"> <li>■ Contracting education services and outreach to other organizations</li> <li>■ Shared office / “conservation campus”</li> <li>■ Merger</li> <li>■ Coordination of shared promotions</li> </ul>
<b>Trinidad Coastal Land Trust</b>	<ul style="list-style-type: none"> <li>■ Shared Outreach /Media: NCJ article; KHSU radio spots, website and calendar</li> <li>■ Up to speed meetings (vs. NRC)</li> <li>■ Shared volunteers (trailwork, monitoring and <u>mentoring</u>)</li> <li>■ Paid volunteer / outreach coordinator for the cohort</li> </ul>



## Subgroups

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At the end of the retreat, subgroups were formed to explore more deeply the various forms of collaboration. The subgroups will convene between now and the next cohort retreat to identify a range of real collaboration options for the cohort and the next steps needed to begin to implement these collaborations. Each subgroup will report back to the full cohort at our next retreat on January 27, 2014. Solid Ground Consulting will coordinate and facilitate the meetings of the subgroups.

<b>Office and record storage</b>	John St. Marie, Carol Vander Meer, Nancy Correll, Martha Spencer
<b>Volunteer coordination</b>	John St. Marie, Ben Morehead, Susan Elliott, Carol Vander Meer, Judy Haggard, Susan Ornelas
<b>Education and outreach</b>	Ben Morehead, Betsy Watson, Carol Vander Meer, Nancy Correll, Bob Wunner, Sarah Pilkington
<b>GIS mapping</b>	Betsy Watson, Judy Haggard, Martha Spencer
<b>Information sharing</b>	Susan Elliott, Sarah Pilkington
<b>Financial / job share</b>	Susan Elliott, Sarah Pilkington