

THE BIG SUR LAND TRUST AND THE NATURE CONSERVANCY

PARTNERSHIP OWNERS' MANUAL

OCTOBER 19, 2007

INTRODUCTION

Representatives from The Big Sur Land Trust and The Nature Conservancy met on October 19, 2007 to develop a partnership agreement. The group drafted a memorandum of understanding to articulate the nature of the partnership. In addition, the group discussed in detail many aspects of the partnership not captured in the MOU. This document attempts to complement the MOU by providing the essence of those discussions on how to manage the partnership.

PURPOSE OF THE PARTNERSHIP

The purpose of this partnership is to further the mutual goals of both organizations by establishing a structure and clear expectations where the two groups can work together in a way that complements each others' attributes and actions and contributes to a larger conservation impact than either singlehandedly might be capable of accomplishing.

The Big Sur Land Trust has a solid and rapidly developing local presence and is building strong capacity to enable the organization to conduct meaningful and impactful conservation for years to come. It is in an exciting phase of its development where expanding its strategy, image, professional capabilities, body of accomplishments, business systems and network of contacts is a top priority.

TNC has regional, national and global perspectives, many important contacts, and strong business systems. TNC has been around for more than 50 years, and has developed its image, its relationships and its business systems. The Nature Conservancy has some of the same priority conservation areas and has complementary skills but does not have the same local presence. Both organizations wish to see their separate and joint efforts succeed in Monterey County.

Therefore the roles in the partnership will be for The Big Sur Land Trust and The Nature Conservancy, jointly and separately to deliver on-the-ground conservation, and for The Nature Conservancy to assist The Big Sur Land Trust in growing its capacity to deliver.

HOPES AND EXPECTATIONS FOR THE PARTNERSHIP

Participants identified the attributes they hope the partner will bring to help them in their pursuits.

What BSLT Has that TNC Needs

- Local presence and connections
- Stability as a long-term community player
- Ability to build local conservation network
- Capable and diverse staff and board members living in the community
- Understanding of local issues and diverse constituencies

What TNC Has that BSLT Needs

- Science and stewardship methodology
 - Species inventories
 - Conservation planning, site design, site selection, monitoring protocols
- Mapping and GIS analysis
- Legal specialists for deals
- TNC brand credibility & recognition
- Broad conservation messages & global context
- Ability to invest in staff development and capacity

Both organizations have significant capacity to conduct real estate transactions and stewardship operations, raise public and private funds, and create government and public relations advances. That said, these areas emerge as opportunities for both organizations to work together to create additive conservation gains:

- Enlarge the mission by expanding the cause
- Expand philanthropy
- Provide a new philanthropy story for long-term donors
- Reduce confusion with landowners and donors
- Enhance efficiency by portioning the workload
- Operate with more rigor and capacity
- Expand our ability to work together with other partners

- Transition out of deals with greater elegance
- Increase public interest in conservation
- Improve our collective land transaction capacity
- Develop better funding & take-out strategies for transactions (short- and long-term)
- Strengthen and expand Government relations connections
- Boost Fundraising for public and private money
- Expand relationships with key landowners
- Deepen and expand our collective experience in more locations in the county
- Enhance our joint understanding of project costs and financing
- Adopt each others' good ideas and practices

These complementary attributes lead to the partnership roles: BSLT as TNC's main partner in local implementation and TNC as a capacity builder to help BSLT develop into the organization it aspires to be.

ELEMENTS OF THE PARTNERSHIP

Successful partnerships require three things:

1. Common goals that are important enough for both organizations to work together
2. Compatibility of cultures
3. Effective partnership management practices

1. COMMON GOALS

The participants first listed their organization's priorities separately, and then identified areas of overlap to develop a slate of common goals.

The Big Sur Land Trust Goals

BLST is in the midst of a strategic planning project that has it moving from a map-based organization to a relationship-based organization. Its major aim is becoming the organization in Monterey County that restores and strengthens *connection of people to the landscape* and elevates conservation as a community value.

Strategic Themes

- Whole healthy ecosystems in Monterey County
- Youth and families
- Local, durable economies, ecosystem services, housing, agriculture economies
- Stewardship ethic and capacity in local communities
- Healthy communities, with an emphasis on engaging those communities that have been less served by conservation organizations and “portal” partners

The focus of the new strategy will require “New metrics”, a focus on the new cultural make-up of Monterey County and the next generation of land stewards and conservationists and how to engage them, leading to a durable democratic society connected to the land.

BSLT’s near term conservation priorities include:

- Monterey Seashore sites including Martin Dunes, Armstrong Ranch and Cemex/Lonestar
- Carmel River watershed
 - River parkway program reconnecting community to the river
 - Acquiring critical floodplain properties
 - Floodplain restoration complimenting the removal of San Clemente Dam
 - Water rights strategy
- Working Landscapes & Critical Ranchlands
 - Dorrance Ranch easement
 - Violini Ranch easement
 - Rana Creek
 - Other critical parcels to Santa Lucia Wildlife Corridor
 - Marks Ranch
 - Oak Woodland Plan
- Gabilan watershed
 - Carr Lake
 - Tembladero Slough
- Salinas River
 - *Arundo* control as a way to bring people together
 - Arroyo Seco

- River corridor protection (Armstrong Ranch, riparian easements)

- Big Sur

- Inholding acquisitions with Wilderness Land Trust
- Endowment for community capacity e.g. fire planning, invasive species, health center
- Big Sur River restoration project

BSLT's capacity goals are:

- \$2-2.5m in reliable annual support
- Preparing for 2009 capital campaign launch
- Public funding in the neighborhood of \$3-4 million annually

The Nature Conservancy Goals

TNC's approach focuses on largest intact landscapes and opportunities for the most leverage. TNC has an organization-wide goal to protect 10% of each major habitat type. This also has connections to marine habitats, with emphasis on salmon and steelhead at the southern edge of their range where they are most genetically plastic. Climate change also figures into TNC's work. TNC has identified 12 portfolio sites in Monterey County and is actively engaged in the following:

- Salinas River

- Protecting lands and waters (Arroyo Seco)
- Protecting McKinsey Ranch & Los Vaqueros Ranch
- Playing role as (Interim) leader in a coalition focused on making food safety standards policies more ecologically sound.
- Completing a Biological assessment of Salinas
- Hoping to create constituency for resource values through applied science

- Carmel River Watershed

- Support partners' efforts to protect 12,000 acres in the upper watershed
 - Protect Dorrance Ranch & Violini Ranch
 - Protect Rana Creek and/or Oak Ridge ranches
- Policy reform

- Develop conservation vision recommendations for general plan?
 - Strengthen woodland protection program
- Gabilan Range and San Benito River
 - Develop strategy for conservation easements and acquisitions
 - Policy
 - Engage in Monterey county land use policy, general plan update and concomitant ordinances
- Elkhorn Slough and Watsonville
 - Transition projects to other successful conservation groups
- Fort Hunter Liggett and Camp Roberts
 - Track in case opportunity emerges for this important priority area

Current Conservation Goals in Common, subject to change and evolution over time

- Carmel River watershed
 - Floodplain and upland components
 - Water rights
 - Funding strategy that brings it together
- Salinas River
 - Arroyo Seco
 - Riparian (*Arundo*, Weed Management Area), Armstrong
 - Relationships with big ag and landowners
 - Biological assessment
- Highway 68 & Other Critical Landscape Connections
 - Wildlife corridor strategy
 - Oak woodlands
- Working ranches
 - Linkage easements
 - Monitoring and enforcement
- Gabilan Range/Watershed
 - Ranch and Ag sustainability

2. COMPATIBILITY OF CULTURES

Both organizations share traits of successful land conservation organizations that make a partnership likely to succeed:

- Working voluntarily with landowners
- Working in a non-adversarial manner
- Working toward completion of real estate transactions
- Effective philanthropy and public funding generation
- Good use of science and data for decision making
- An eye toward stewardship and long-term management of conserved lands
- Working in partnership with local organizations

BSLT's mission includes much more than biodiversity conservation, which is TNC's sole mission focus. Both organizations have similar methods and values that make any differences in mission workable.

3. EFFECTIVE PARTNERSHIP MANAGEMENT PRACTICES

The participants identified these elements as key to maintaining a productive partnership. Clarity on:

- Each other's goals, clear guidelines on how and where to work together
- What each group can promise, deliver, what it takes to get things done in their organization
- Conservation easement standards
- Process for resolving differences
- Key lead for team to avoid unnecessary differences and difficulties

Make decisions in a timely way.

Bill Leahy is the partnership manager for BSLT. Wendy Millet is the partnership manager for TNC. The partnership managers have the authority to make commitments on their organization's behalf and to marshal resources to deliver on those commitments.

Both organizations agree to use a consensus decision-making style, meaning that both organizations can agree not only to live with the decision but also to carry it out with enthusiasm and true spirit of intent.

Establish and use communication pathways.

Staff from each organization are free to call their counterparts in the partner organization. When they don't know whom to call, they should first call the partnership manager who will direct the inquiry to the proper people, and may delegate future conversations on that topic to the people who can best address it.

- Conservation programs: Donna Meyers and Chris Fisher
- Philanthropy: Lana Weeks and Karen Eller
- External communications: Rachel Saunders and Shari Cravens

Frequent communication between both organizations is essential to deal with small issues and emerging issues in a timely way, to remind each other that we are still here and interested, and to maintain the personal contact that make the business enjoyable and productive. Even when there is no good reason to call, phone calls are useful. Both organizations agree to make a point of dropping by when they are in the neighborhood, even if just for a few minutes.

Build in time to be together.

The tie that binds the relationship is the mutual commitment to conserving this important landscape. When staff have an occasion to gather for business, it is important to take time to walk on the land, to see project areas, and to spend time away from the business enjoying the landscape and each other.

Make realistic commitments.

Both organizations are eager to deliver on their promises and hold up their end of the partnership. Both organizations are somewhat leery of making promises that they cannot meet. This show of mutual respect and commitment is healthy, when balanced with the aggressive needs of the conservation activities that both organizations wish to pursue. The decision-making cycle of TNC is often longer and more complex than BSLT's, so everybody needs to be certain that they can deliver on a timely basis before committing to a decision and both organizations need to remain flexible and patient. It would help to allow adequate lead time and put reasonable deadlines on requests.

Evaluate progress and make future plans annually.

Participants talked about having an annual session to evaluate progress, to identify important changes in outside forces, to identify future priorities and to plan the coming year's work. This annual event will complement the ongoing communication, planning, strategizing and evaluation work that happens day by day and week by week. The Partnership program of TNC have offered to monitor the progress of the partnership by tracking commitments and their completion and reporting on them on a quarterly basis.

Manage succession.

As staff members come and go through the partnership, new participants will need to have an orientation to the workings and people in the partnership. The communication pathways have multiple points of contact, which should help facilitate communication even when staff changes. The executed MOU should help new staff understand what's already been decided and how the protocol works. Including the partnership as appropriate in BSLT's emerging strategic plan and placing partnership performance objectives in both organizations' staff annual objectives would also help. Partnership managers should develop a rapid succession plan when key staff is replaced (chairs and vice chairs). Appointing board champions will also help provide stability.

Remember the reason for the partnership.

Both organizations share goals and core values. Both organizations have the best intentions and are committed to success – of the projects and for each other. In times of conflict, successful partnership participants remember that each organization has good intent, and they try to understand the needs and position of the partners. In any case, remember to assume good intentions when the actions or words of the partner are puzzling or seem contrary.

DEALING WITH DIFFICULTIES

Partnership maintenance may result in difficulties, misunderstandings and conflicts. Early, frank discussion, reminding

each other of the basis of the partnership, focusing on common goals, assuming good intent, and using each organization’s strong problem solving skills should resolve emerging differences. Ultimately, Bill and Wendy will resolve any disputes. Above all, each organization will strive to maintain their focus on our important and collective conservation goals over any specific position.

Participants identified areas that might potentially hinder the partnership in the future, and developed ways to avoid problems.

<u>Issue</u>	<u>Prevention and Treatment</u>
BSLT emphasis on community v. TNC emphasis on science	Frequent communication Spend time together Identify and treat early, while assuring that each stays true to its mission Project protocol
Land transaction standards	Project protocol Take out agreement standards
Staff moving on and new faces moving in	Spend time together Orientation and welcome Keep the MOU in front of decision makers
Changing organizational priorities	Frequent communication Spend time together Annual evaluation and planning
Publicity and claiming credit	Creating and using an external communications template or mutual approval of all joint public relations efforts
Interest in the same properties and relationships with the same landowners	Project protocol Frequent communication – keep each other updated as to communications with landowners Agreement not to talk trash about the partner
Lack of time necessary to maintain the partnership	Place specific partnership tasks in staff annual performance objectives Annual evaluation to see if it’s still worth it Schedule and conduct monthly calls
TNC science staff are over-extended	Put deadlines on requests Be patient Work through Wendy

Table 1. Potential pitfalls and resolutions.

SUCCESS INDICATORS

To monitor the effectiveness of the partnership, these indicators may help.

<u>Class</u>	<u>Indicator</u>
Inputs	Execute MOU Appoint partnership managers and board champions
Activities	Monthly contacts Coordinate with each other on annual objectives and strategic planning Evaluation of the partnership
Outputs	Protocol and procedures for transactions Joint Project Plans Press release template Joint Media and other communications
Outcomes	Transactions Capacity improvements Funds

ENDING THE PARTNERSHIP

At some point, the relationship between BSLT and TNC will be so different from the one envisioned in this partnership, it will be time for this one to end. A successful exit to this partnership will be when BSLT is so fully competent that it has little to ask from TNC and TNC has little to offer, and when the conservation projects of mutual interest are completed.

Every partnership should plan for an ending. If a new need for partnership arises, a newly structured partnership with a targeted design can always emerge. Once the reason for the original partnership is satisfied, it's time to wind it up, declare victory, celebrate, and move to the next phase of history.

ACTION STEPS

<u>Task</u>	<u>End Date</u>	<u>Lead Persons</u>	<u>Notes</u>
Recruit board champions	12/31/2007	Bill, Wendy	e.g. George Somero, Bill Landreth, Bill David
Create external communication template	12/31/2007	Rachel, TBD	using Dorrance and Violo closings as example
Create a transaction protocol	12/31/2007	Donna, Chris	

Determine BSLT science needs	3/08	Bill	This will flow from BSLT strategic plan process
Support with input and feedback BSLT strategic plan	3/08	Bill, Wendy	
Develop an approach for joint philanthropy	3/08	Lana, Karen	
Track and report the partners movement on action steps	12/31/2007	Steve	
Set up and conduct periodic calls	12/31/2007	Donna, Chris	CF to set up November call as kick-off. We will decide frequency of calls at that time.
Execute MOU	3/30/2008	Bill, Wendy	
Investigate local effort for public funding	3/08	Rachel, Jessamine	
Develop public funding strategies to support mutual goals with special attention on Prop 50 and Prop 84 watershed monies	3/08	Bill, Wendy	
Insert collective priorities in each others plans	12/31/2008	Bill, Wendy	BSLT expects initial draft by 1/31/08
Schedule meetings to discuss joint plans and priorities	12/31/08	Bill, Wendy	4 meetings a) Conservation Initiatives b) Science c) Public funding d) Private Funding
Discuss long-term staffing, partners, funding capacity in County including creating a more viable takeout partner for future	4/08	Bill, Wendy	

12/31/07