INTRO TO DURABLE COLLABORATIONS AND MERGERS

Connecticut Land Conservation Conference

March 23, 2019
WELCOME
INTRODUCTION

WORKSHOP GOAL:

To increase awareness and understanding of the role collaborations and mergers can have in improving land trust sustainability and impact.
AGENDA

I. Reasons why land trusts choose to collaborate or merge

II. The spectrum of collaboration strategies and types of mergers

III. How to start the conservation about collaboration or merger
Why Are We Talking About This?
What Collaborations & Partnerships Are Not (and What Some Mergers Sort of Might Be)

- A sneaky euphemism for merger
- A surefire way to lose your autonomy/identity
- Mainly just a good strategy for getting grant money
- The Holy Grail
- A pricey, complicated endeavor
- Forever
- A 100% balanced arrangement
- An investment you can’t afford to make
DURABLE COLLABORATIONS & MERGERS
INTRODUCTION
CONSERVATION IN CONNECTICUT
Did you know? Connecticut ranks third in the nation for the number of land trusts. Connecticut is also the third smallest state.
National Organizations
Audubon Connecticut
Land Trust Alliance
The Nature Conservancy
Trust for Public Land

Statewide Organizations
CT Audubon
CT Land Conservation Council
CT Farmland Trust
CT Forest & Park Association

Regional Conservation Partnerships /
Convening Organizations
Last Green Valley
Litchfield Hills Greenprint Collaborative (HVA)
Fairfield County Regional Conservation Partnership
Friends of Silvio O. Conte Nat. Fish and Wildlife Refuge
Lower CT River and Coastal Region Land Trust Exchange
Hudson to Housatonic RCP
Berkshire Wildlife Linkage Partnership
Small Area Land Trusts (SALT)
WEANTINOGE HERITAGE LAND TRUST: PARTNERSHIP FOCUS

Multi-Town Land Trusts
Aspetuck Land Trust
Avalonia Land Conservancy, Inc.
Flanders Nature Center
Great Meadows Conservation Trust
Heritage Land Preservation Trust
Joshua's Trust Conservation & Historic Trust
Kongscut Land Trust, Inc.
Middlesex Land Trust
Northeast Utilities Land Trust
Northern Connecticut Land Trust
Roxbury Land Trust
Waterford Land Trust, Inc.
Weantinoge Heritage Land Trust
Wintonbury Land Trust
Wolf Den Land Trust
Wyndham Land Trust

AND 100+ LAND TRUSTS
As of 2015, CT land trusts protected 145,000 acres. Perpetuity!
PARTNERSHIP MODELS
DURABLE COLLABORATIONS & MERGERS
PARTNERSHIP MODELS

WHY PARTNER?

• To increase the pace of land conservation

• To identify and protect our most precious shared landscapes

• To be a resilient network of strong, effective organizations

• To become fully integrated with our local communities

• To satisfy our missions in perpetuity
DURABLE COLLABORATIONS & MERGERS
PARTNERSHIP MODELS

COLLABORATION IS DIVERSE

- Purchase goods/services
- Share space
- Combine marketing
- Share fundraising activities
- Form a new organization to deliver specific services
- Share program delivery
- Share staff
- Network & share information
## DURABLE COLLABORATIONS & Mergers

### Partnership Models

<table>
<thead>
<tr>
<th>Level of Autonomy</th>
<th>Level of Partnership</th>
<th>Definition</th>
<th>Example Groups</th>
<th>Example Tasks</th>
</tr>
</thead>
<tbody>
<tr>
<td>Independent</td>
<td>Informal Alliance</td>
<td>Independent groups in voluntary alignment</td>
<td>Most RCPs, SALT</td>
<td>Sharing information, group goal setting and planning, cooperation</td>
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<td></td>
<td>Contract-Based Alliance</td>
<td>Independent groups bound by written agreement</td>
<td>Berkshire Taconic Part., Many groups with shared staff</td>
<td>Sharing staff and services, providing fee for service, MOUs with responsibilities</td>
</tr>
<tr>
<td>United</td>
<td>Merger</td>
<td>Parties create a new entity or merge into an existing entity</td>
<td>CVRLT, NCLT</td>
<td>Creating a united vision and mode of operation</td>
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</tbody>
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DURABLE COLLABORATIONS & MERGERS
PARTNERSHIP MODELS

INFORMAL ALLIANCE

Elements
• Wholly-independent groups
• Working together informally, without contract
• Fiscal sponsor optional

Benefits
• Allows for group planning and strategy setting
• Lots of flexibility
• Information sharing/group learning
• Great way to get started. Can lead to other types of partnership.

Disadvantages
• Long-term sustainability may be an issue
• Ensuring goals of all partners are met over time
• Limited shared resources
DURABLE COLLABORATIONS & MERGERS
PARTNERSHIP MODELS

CONTRACT BASED ALLIANCE

Elements
• Wholly-independent groups
• Written agreements related to service/goods/project
• Creates clear duties and obligations

Benefits
• Formalizes roles and responsibilities
• Flexibility
• Can lead to other types of partnership

Disadvantages
• May have limited scope
• May be time limited
• May not feel like an alliance
DURABLE COLLABORATIONS & MERGERS

PARTNERSHIP MODELS

MERGER

Elements
- Mutual decision
- Merging of cultures, assets, and risks
- Merge into existing entity or create a new one,
- Fully integrated programs, planning, and funding

Benefits
- Increase impact
- Increase efficiency
- Improve sustainability (perpetuity)
- Reduce competition

Disadvantages
- Poor planning could create risk
- Poor planning could also result in relationship problems or loss of community support
TIPS AND TRICKS

• Increasing partnership can be challenging
• Respect each organization’s autonomy and processes
• Take time to build trust and confidence
• Transparency and good communication are essential
• Set reasonable expectations - don’t overpromise
• For mergers - adequate reserve and stewardship funds are key to long-term success
Land Trust Essential Functions
# Durable Collaborations & Mergers

## Land Trust Essential Functions

<table>
<thead>
<tr>
<th>TASK</th>
<th>Who does this task now? (Board Mbr, Staff, Consultant, Volunteer, No One)</th>
<th>Could this be a shared task with another organization (land trust or other)?</th>
<th>Who specifically could the task be shared with?</th>
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<tbody>
<tr>
<td>Land Acquisition</td>
<td>Identify potential projects, lands important to conserve</td>
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<td>Initiate/respond to initial contact with/from landowner</td>
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<td>Evaluate project against land trust’s criteria</td>
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<td>Conduct environmental assessment</td>
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<td>Obtain/conduct surveys</td>
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<td>Notify landowner of tax code and appraisal requirements</td>
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<td>Obtain appraisal (for purchases)</td>
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<td>Negotiate over easement/deed terms</td>
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<td>Obtain and analyze title opinion</td>
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<td>Complete baseline documentation report (for easements)</td>
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<td>Prepare management summary (fee properties; pre-closing)</td>
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<td>Calculate stewardship funding need</td>
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<td>Provide legal services (easement drafting, review of closing documents, etc.)</td>
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<td>Review landowner appraisal and Form 8283 (for donations)</td>
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DURABLE COLLABORATIONS & Mergers
LAND TRUST ESSENTIAL FUNCTIONS

1. What partnership model(s) seem most likely to fulfill your goals and outcomes?

2. What are the possible benefits of partnerships for your group and your partner(s)?

3. What potential challenges, obstacles, risks, do you see?

4. What additional information would you like to know before pursuing a partnership?
RESOURCES

Jump in, the Water’s Fine!
Collaboration Inspiration for All-Volunteer Land Trusts

Carla Lee Lewis

An Introduction to Mergers for Land Trusts

DURABLE COLLABORATIONS
Part 1: Strengthening Land Conservation Through Lasting Partnerships

ST. JUDE'S RESEARCH HOSPITAL
RESOURCES

Advanced Collaboration & Merger Assistance Program