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# WORKING WITH PARTNERS

TOOLS FOR  
ENGAGING LANDOWNERS  
EFFECTIVELY

## 3

# WORKING WITH PARTNERS

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## 3.1 Identifying Potential Partners

Partnering with organizations working toward the same goals can be quite powerful. Each party brings their own area of expertise and resources, and often, you can build efficiencies by coordinating work or dividing work according to skills, resources, or location. The first step toward building a successful partnership is thinking carefully about whom to include.

A good starting point is to ask yourself: Who else is working on similar issues in your region? A watershed group? A state agency? Scouts? A hiking or mountain biking club? A land conservancy? A school or volunteer association? Think about all the people who live, work, or play in your project area and who might be invested in the health of its natural resources.

Also, think about who already has relationships with the landowners you seek to engage. Who has funding for this sort of work? Who has the ability to track efforts and progress? Are there regulatory agencies that may play a role (e.g., issuing permits, providing tax abatement or cost-share)? As you gather more potential partners, check in with them for suggestions of other folks who should also be engaged.

Let's say you're working to make sure that timber cuts on private lands are done in a sustainable manner. State natural resource agencies and University Extension are likely go-to partners because this work aligns with their organizational missions. Local birding or hunting groups may be interested because the project will help ensure healthy habitats for the birds and animals they love (to watch or hunt). Perhaps a watershed organization would get involved because unsustainable timber cuts often also result in more erosion issues. Industry may even be interested in investing in this work because they want to maintain their local supply chain.

In another example, perhaps you own a nature preserve but need help maintaining it. Would a nearby high school be interested in a service-learning opportunity? Does the local community's business association view the preserve as a town asset it would be willing to support? Does the historical society view

it as helping to preserve the historic character of the area? Think about how your goals might overlap with theirs.

Once you have identified all potential partners, start to narrow down the list. You don't have to (and usually shouldn't) partner with everyone who is able and willing to help you. If an organization's mission does not fit with the project goal, if they are overstretched with other activities, or if they want you to alter your project goals and parameters in ways that would dilute your impact, save that relationship for another day. Not everyone needs to be a partner on every project. Having too many partners, or the wrong partners, can lead to sluggish progress, mission creep, and spoiled relationships (that may have been fruitful in a different context). Remember, someone has to set up all of those conference calls and meetings. Don't give yourself a headache by inviting more partners than actually needed. There will be opportunities for more partnerships in the future.

Don't invite people into your partnership if you aren't prepared to listen to them and incorporate their perspectives and concerns. On the other hand, don't be afraid to invite people into your partnership because you think they have different views from you; they may be the most important link for ensuring your goals are achievable. If an organization is crucial to your effort but doesn't have the resources to participate, see if you can support or incentivize them by contributing toward their time and travel expenses.

Finally, if your project has (or even seems to have) a negative impact on an organization or group, it is important to engage with them early in the process. The group may or may not be a formal member of your coalition but should be invited into the process. In this way, their needs can be heard, and they can contribute early to solutions that will work for them.

For example, the Watershed Agricultural Council (WAC) works with loggers in the New York City watershed to encourage the use of water quality BMPs during logging operations. Rather than a

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regulatory approach, WAC uses a voluntary system in which loggers receive the financial incentives and technical support they need to use BMPs. Now WAC is seeing greater implementation rates, is regularly invited to plan harvests in advance with loggers, and inspects the sites when harvesting is complete. If WAC hadn't worked directly with the loggers, it would have been hard to know how to achieve these gains.

Keep in mind that you don't get to choose your partners; you only get to invite them to join you. Each participating organization will need to see the

value in spending time and effort working toward the partnership's goals and may not be willing or able to participate at the level or in the ways that you desire. Partner organizations may get different immediate benefits from participating in your project (e.g., more access to biking trails, new ideas for science fair projects, opportunity to voice concerns about proposed actions), but solid, long-lasting partnerships are usually built on a deeper commitment to the overall goals of the project and alignment with each other's missions.

**When identifying partners, a good rule of thumb is to include as many organizations as you need, but no more. Think broadly and creatively about who might be good to partner with, but think critically and strategically when actually setting up the partnership.**

### 3.2 Framing the Partnership

Partnerships, coalitions, and collaboratives come in all sizes and vary in scope, depth, and timeframe. This section provides some ideas about how to structure your partnership in a way that is appropriate for your project and manageable for your organization and your partners.

First, it is important to understand that you don't always have to build a coalition to accomplish your goals. If the challenge you are addressing is relatively focused, well-defined, and time-limited, and if your organization has the capacity to deliver the outputs and outcomes, it may be more efficient to work alone. The structure of the project can then be aligned with your organizational structure, and project activities can be aligned with your regular work. In this context, you will also have the ability to measure outcomes and use and report the data as needed. You can still invite other organizations to participate in your work as appropriate and in an ad hoc way (for example, by asking a partner organization to send a speaker to your meeting or to publicize the event through their network). These opportunities to support each other can be mutually beneficial, but they are not strategic partnerships (although they may set the stage for more coordinated efforts in the future).

Sometimes, however, involving partners at a more strategic level can greatly enhance your project and may even be necessary to accomplish your conservation goals. This may be the case when:

- The issue you're addressing extends beyond your agency's jurisdiction and you need to partner with another agency to achieve your goals.
- You need partner organizations to provide financial assistance, technical assistance, or products and services to enable landowners to take the actions you're promoting.

- You are trying to reach a new and unfamiliar audience and need the local knowledge and networks of your partner organizations.
- You simply do not have sufficient capacity and resources to conduct your program at the scale needed to have an impact.

Partnership structures can range from informal agreements to remove invasive species along a shared boundary to formalized arrangements in which organizational lines become fluid, with staff helping across organizations and audience information and tracking data housed in a shared location. Organizing collaborative efforts is easier when the roles that partner organizations are asked to play are well aligned with their existing work responsibilities and directly advance their own goals. Partnering becomes more difficult when you ask partner organizations to alter their operations or priorities to help achieve specific collaborative goals. Deeper levels of collaboration require more coordination management, more organizational commitment, a significant focus on relationship building and communication, and a willingness to permit decision-making to occur within the collective. However, these deep collaborations also have the potential for much greater impact and are necessary for addressing certain kinds of complex, multi-dimensional, and multi-jurisdictional conservation challenges.

It is useful to think of the depth of your collaboration along a continuum (see next page). No point on the continuum is better or worse than the others; the important thing is to find the level of collaboration that fits the scope of the problem and capacity and motivation of the partners involved, and to align roles and expectations accordingly. You can also be flexible, deepening or lessening engagement as the project progresses, or working more closely with some partners than others.

**Partnerships entail different levels of engagement and alignment. As a general rule, deeper partnerships have greater potential for impact but also require more management time, effort, and skill. It is important to set up your partnership in a way that suits project goals and matches your organization's investment in building and managing the coalition.**

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TABLE 3A: COLLABORATION MODELS ON A CONTINUUM

	LESS COLLABORATION ..... ➔ MORE COLLABORATION		
	<b>Working Alone (with ad hoc support from other organizations)</b>	<b>Working Together to Implement a Project</b>	<b>Forming a Partnership to Address a Complex Issue</b>
<b>Nature of the Problem</b>	Suited to address problems that are focused and well defined, and the lead organization has the skills and capacity to deliver meaningful results.	Works when problems are focused and well defined but partner skills and resources, or cross-jurisdictional efforts, are needed. Partners must coordinate actions to deliver meaningful results.	Needed when the issue is not well defined or is a set of interrelated cross-jurisdictional problems. Many partners must take complementary actions to deliver meaningful results.
<b>Project Objectives</b>	The project objective is set by the lead organization and it addresses their mission.	The project objective is set by the lead organization but aligns with participating organizations' missions.	The partnership's objectives are determined jointly to address a landscape-level need.
<b>Partners' Obligations</b>	The lead organization requests specific help as needed, and partners provide help as they are willing and able.	Partners commit to making some contribution to the project. These contributions usually involve altering their existing activities to increase impact through coordination.	Partners commit to the objectives established by the partnership and adjust their work to meet them.
<b>Measuring Results</b>	The lead organization tracks results as needed for organizational or grant requirements.	Each organization tracks their own results as needed for organizational or grant requirements. Partners share tracking or summary data with each other as they are able.	The partnership tracks all actions across organizations to assess overall progress and the interactions of different activities. Results are shared with partners to direct future work.
<b>Potential Impact</b>	The impact of the project is limited by the lead organization's jurisdiction and resources.	The impact of the project is limited by the jurisdiction and resources of partnering organizations, with possible efficiencies from coordinated actions.	Efforts by partner organizations interact with and feed into each other, leading to impacts that would not otherwise be possible.
<b>Example</b>	The lead organization supports oak regeneration through landowner workshops and tree giveaways. They make requests to partners to present at events and to use their offices as distribution locations for tree giveaways.	Partners support oak regeneration through cross-boundary management actions that are coordinated to create a larger area of contiguous management. They also coordinate their landowner outreach to focus on this region.	The partnership supports the stabilization of oak habitat by changing how forests are managed in the region across all ownership types. They work to engage all relevant audiences, including landowners, loggers and policymakers, to reach their objectives.

### 3.3 Choosing Representatives

Once you figure out the level of collaboration you intend to pursue and the organizations you hope will join you, you can think about the management level that will be most appropriate to engage those organizations. The people who know what the issue is, and know what needs to happen on the ground, may not be the people who have the authority to direct an organization's resources or priorities. There are many ways to deal with such a situation, each of which might be more appropriate for different conditions.

#### FIELD-LEVEL

Sometimes, all you need are more arms and legs (and heads) to implement the program and extend its reach. In that case, it may be simplest to work directly with field staff who can incorporate the program's objectives into their daily work with landowners. These folks also have the best understanding of landowners and other stakeholders in the community, and their input can be crucial for getting the small tactical decisions right—such as where to hold a meeting, what community organizations to approach, or where to place your fliers.

The downside of this approach is that field staff often have little autonomy to set priorities, and they have many competing objectives and metrics to meet. Directly engaging with field staff works best when the partnership support you need is well aligned with their daily work, and/or when they can choose to participate as their time allows. It is also important to secure their supervisors' buy-in for the project and to ensure that these decision-makers understand the project's achievements and their organization's contribution to the effort. Where possible, official support via a memorandum of understanding or similar agreement can give field staff more leeway to make decisions within certain parameters.

#### EXECUTIVE-LEVEL

In a different case, you may need partner organizations to commit significant concrete resources, provide strategic direction for the partnership, or agree to align their organizational priorities with those of the partnership. In this instance, it may be best to engage senior or executive-level staff who can direct their organization and provide a level of credibility to the partnership. These folks will be interested in large-scale impacts and how their organization can be a leader in addressing the challenge. However, they may not fully understand the details of the issue or

particular barriers that field staff may face. Moreover, senior staff are often under pressure to be working on their own organization's core mission and challenges.

When working with this cohort, focus partner meetings on broad, strategic issues and ensure meetings are informative by bringing in speakers to discuss the impacts of the issue or to report on the progress of the partnership. Once the partnership has established a general direction and the partners have committed to supporting the project, institute working groups that engage mid-level staff in the finer details of implementing the work. Keep senior-level staff involved through brief updates on progress, highlighting how their organization is contributing and how their organization's goals are being met through the partnership's efforts. Bring them back to the table when it's time to reassess strategy or priorities.

#### MID-LEVEL

Finally, you may be working with staff that are somewhere in the middle. These folks are likely to understand the issues on the ground, have close connections with field staff, and may have some autonomy to commit time and resources to the partnership on behalf of their organizations. However, they will need to get buy-in for the partnership up and down their chains of command. They may not be in a position to direct the structure and scope of the partnership and may need to get approval from their organizations regarding issues such as data sharing and branding. While they are likely to have influence over other organizational resources, it is important to ensure these partners have information and arguments to assist them in gaining buy-in, such as benefits and successes of the partnership. You will also need to allow ample time for the making of decisions that may require them to consult with their organizations.

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Regardless of who serves as an organization's representative, consistency is key. At the outset, make sure that the individual representative and their organization are committed to their participation in your project. A simple sheet outlining basic partner expectations can help create clarity for everyone. It may include, for example, the goal of the partnership, the estimated time commitment (e.g., four meetings a year, with email communications in between, for the next two years), and a request that they let you know if they are no longer able to participate.

It can sometimes feel as if you have to "take what you can get" when seeking partners, but if you consider all of the time and effort (and sometimes money) that you will be putting into the partnership, it makes sense to be selective and require some level of commitment. It is hard to accomplish much when issues have to be re-explained at each meeting, or you get a rotating cadre of organizational representatives who don't entirely understand the purpose of the partnership or their organization's role. Of course, not everyone will be able to attend every call, but if an issue is actually important to that organization and they see value in the partnership, it is not unreasonable to ask them to attend meetings consistently.

**Depending on their expertise and positions, senior, mid-level, and field staff bring different skills and resources to the coalition. When you have a choice, try to ensure that the positions of your points of contact at partner organizations are aligned with the kind of participation and contribution you seek, and be prepared to manage the coalition accordingly. Do your best to make it easy for your partners to participate by providing data and resources that will help them get the buy-in they need.**



### 3.4 Managing the Partnership

Managing a partnership takes time and effort and adds a layer of complexity to the project. This section provides guidance on three crucial aspects of managing a partnership: setting goals and expectations at the start of the project, coordinating ongoing activities, and using evaluation data to promote accountability and shared learning.

#### A SHARED UNDERSTANDING OF GOALS AND EXPECTATIONS

When building a coalition that expects to work together over a long period, take time at the start of the project to ensure that everyone is on the same page. Don't assume that similar or aligned organizations see conservation challenges in the same way; ask them. Do your partners agree on the main problem and the most effective solutions? Do they agree on what success looks like? And does each organization understand its role and that of the other partners? It is better to seek clarity early on rather than be hampered by confusion or tension later in the game.

For example, suppose your partnership is working to conserve habitat for a threatened bird species. Perhaps your organization believes that the biggest imperative is to preserve habitat corridors through conservation easements and the purchase of land. Another organization may be focused on managing invasive plants that are negatively affecting their nesting sites, while another is working to encourage pet owners to keep their cats indoors and their dogs leashed when young birds are just leaving the nest. Even though each of these organizations may claim the same goal—increasing the number of these birds—the path to get there and the metrics to measure success along the way will be different for each. This doesn't mean these organizations can't work together to achieve this goal. In fact, you are likely to see greater success if you coordinate your efforts to focus on particular geographies. However, each organization must be clear about their goals and contribution to the partnership.

In another example, suppose your partnership is working toward sustainable timber management. You agree that many landowners will need technical and financial assistance to accomplish this. Your organization is able to provide management plans for the landowners, while another provides the financial assistance. However, you will need to agree on what sorts of practices are most important for sustainable timber management. If you are focused on thinning before harvest and replanting after harvest, while your partner is focused on managing invasive species and supporting natural regeneration, the partnership will not be as effective because the opposing messages could confuse the landowners, or the activities you recommend may not be covered by the available financial assistance. The Ladder of Engagement ([see Section 2.2: From Project Goals to Landowner Actions](#)) is a great tool to help you and your partners get on the same page about goals and see how your different roles work together to support landowners at different steps.

Early discussions to reach agreement on goals, plans, and expectations are a vital step in forming an effective partnership. Having a facilitated discussion helps ensure that all partners' voices are heard and that everyone is actually in agreement about the path forward. It may be beneficial to use an inhouse or external facilitator who is not involved in the project to neutrally facilitate the discussion and help the partners to be candid. It can take some time to reach agreement, but this investment pays off because there is less confusion about who is doing what and why, and the discussion helps ensure smoother progress.

#### PROVIDING EFFECTIVE COORDINATION

Coordination and consistent communication are key for any partnership to work. Someone has to be in charge of ensuring everyone is on the same page, everyone's voices have been heard, and the group is in agreement about how to move forward. Someone also needs to nudge groups or individuals to follow through on what they have agreed to do. If you are the one initiating the partnership, then the coordinating person will likely be you.



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The coordinator's role is not simply to "manage" the coalition; it also includes fostering and sustaining relationships. Given that an effort to move landowners toward your desired goal could unfold over months or even years, it's important to build and maintain relationships with partner organizations so they continue to support the project and fulfil their roles. Efforts to keep partners engaged with you and with each other increase their personal and organizational investment in the program's goals and build trust for repeating and deepening collaboration over time. Here are some considerations to keep in mind.

#### Your partners are busy.

- The easier you make it for your partners to do what you ask, the more likely that task is to get done. Ask your partners what works best for them in terms of scheduling, platforms for sharing resources, or areas where they need support.
- Ask for what you need only from a particular person or organization, rather than giving the same tasks to everyone. When appropriate, form smaller working groups to take on tasks that the whole partnership doesn't need to participate in.
- Give people timely reminders of when items are due. Give yourself extra time to follow up after the deadline, because someone will always be late.
- Make the most of meetings when you have them. Distribute your agenda ahead of time, noting items that will need input or decisions. Take good meeting notes and make them available to everyone. Send out action items with names and deadlines.
- Reacting to something is much easier than creating something from scratch. Do background research, so you can give people a starting point. (E.g.: If we use these five threatened or endangered species to focus our work, this is what the map would look like. Here are three alternative landscape goals we can pursue.)

#### Your partners have bosses.

- Establish regular meeting times and work schedules, so partners can plan around them.
- Remind people of the purpose of the partnership and what role their organization plays within the larger framework.
- Provide relevant information that your partners can share with their boss and colleagues to help maintain the buy-in they will need to continue to commit time to the partnership (e.g., reach and impact of the partnership, applicable learnings).

#### Relationships and meaningful work are important.

- If some of the partners don't know each other well, commit time to build relationships, perhaps by organizing a shared meal or field tour for partners, or even by incorporating icebreakers or social time in your meetings. This will help build trust and generate enthusiasm. A bit of fun also sparks more creative solutions to problems and challenges.
- Share successes with the partnership, particularly when you're asking someone to do something that is extra work or that may feel tangential, such as sharing tracking data. Show them clearly how you're using that tracking data to make improvements to the program and create a larger impact.
- Build ownership and investment at meetings by giving partners opportunities to lead particular agenda items and allowing time at the end for everyone to share information about their related work or upcoming programs.
- Share failures with the partnership. Everyone can learn from the lessons of the group, and people will appreciate the transparency.
- Invest in your partners by generating opportunities for professional development that will advance the project.
- Thank your partners frequently and genuinely for their contributions.

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Organizing the work of a coalition and sustaining relationships with partners take time and intentionality—having a dedicated person to shepherd this process is important. In addition, consistent communication, clear goals and expectations, and a bit of grace and understanding are all key to making the partnership work smoothly. If you bring in the right partners from the beginning, all of this will be easier, but even the most ideal partnership will have hiccups. Give yourself some grace, too.

#### EVALUATING SHARED EFFORTS

Discussing benchmarks and indicators at the start of the program is an effective way to ensure that everyone is on the same page regarding what you are trying to accomplish. Indicators bring clarity to vague objectives. For example, the stated goal of your program may be to “increase good stewardship on the ground.” Discussing how progress toward this objective will be measured (e.g., number of stewardship plans written, acres treated against pests, acres of stands improved) helps clarify what practices and behaviors you’re actually trying to promote.

Getting clarity on evaluation indicators, practices, and protocols is also essential for accountability and shared learning, the latter of which being one of the most important benefits of collaborative efforts.

If you are tracking and evaluating your project throughout the process, you will be able to assess and modify your methods as you go along. Each stage is a new hypothesis to test or a new pilot that can then inform each future stage. Even if you don’t have the capacity to set up a formal experiment or comparison groups, you can assess each stage of your project and make informed judgements and shifts based on the data you have.

So when you are discussing your program goals and finalizing your communication objective ([see 2.2 From Project Goals to Landowner Actions](#)), ask your team: How will we know whether our outreach effort is successful? What indicators will we (and others) use to evaluate this program? What benchmarks do we have to meet?

#### TRANSLATING BROAD GOALS INTO SPECIFIC INDICATORS OF SUCCESS



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Your benchmarks and indicators should follow a clear path to your goals. They should also be reasonable for you and your partners to manage. It's better to set modest tracking goals that everyone can reasonably handle than to use ideal metrics that are not realistic.

Also, pay attention to how you will share and use data. Some organizations are unable or unwilling to share certain data, particularly data related to individual landowners. Are there ways to aggregate the data so it can still inform your processes? Is the organization with the most stringent data-handling policy willing to take on the housing and reporting of the data? Can agreements be put in place that would allow additional data sharing within the partnership? Can all partners participate in training to ensure that data security across the partnership aligns with the highest standards? If you can't integrate and share data across the coalition, it will not be nearly as useful for the group.

For partners to buy in to collecting and sharing data, it's important for them to know that data won't be used to judge or punish any particular individual or group. The purposes of data sharing are to provide insights on how to improve the partnership and its work, and to build on strengths and address weaknesses. Start by helping your partners see how the partnership will use the data to make improvements and move closer to the final goal. Afterward, it's important to share results with the whole partnership and be clear about what changes will be made based on those results.

[Chapter 8 \(Evaluation and Learning\)](#) has more information on planning and preparing for your evaluation and ensuring that the results are useful for all partners. Make sure you read that chapter before you launch your program.

Clear and consistent communication is vital to effective partnerships. Spend time early on to get everyone on the same page about goals and plans, do your best to make it easy and rewarding for your partners to participate, and make sure everyone can benefit from the lessons learned by the partnership.