

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.

3 WORKING WITH PARTNERS

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.

3 WORKING WITH PARTNERS

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



3 WORKING WITH PARTNERS

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.