

# **Seven Principles for Effective Conservation Partnerships**

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## **Introduction**

Partnership is often hailed as the best way to accomplish the goals of conservation. The complexity of issues and interests involved in conservation often requires the input and cooperation of multiple constituencies, as well as knowledge and expertise from a number of sectors. Forming strategic alliances – among NGOs, governmental agencies, private landowners, developers, and others – offers the promise of solutions that exceed the scope of what is achievable by any one organization operating alone. Moreover, partnership allows disparate organizations to leverage available funding and build constituencies.

However, while partnerships offer unique opportunities for a powerful, systemic approach to the complex and interrelated goals of conservation, it also presents unique challenges when it comes to integrating the partners into a cohesive and effective entity.

Using our experience evaluating, consulting with and coaching teams and partnerships and our review of recent literature regarding conservation practices, we have distilled the following core principles for conservation partnerships.

- 1. Mutual Interest and Shared Vision**
- 2. Clear Communication**
- 3. Diversity and Trust**
- 4. Empowered Leadership and Effective Decision Making**
- 5. Evaluation and Accountability**
- 6. Adaptability and Creativity**
- 7. Sustainable Resources**

### **1. Mutual Interest and Shared Vision**

Mutual interest is the foundation of any conservation partnership (Trauger, p. 115; Tennyson, p. 7). Individuals and/or organizations come together voluntarily to achieve common goals because they each perceive it to be in their self-interest to work together. The critical elements of this mutual self-interest are:

- Shared Vision – shared conservation objectives and priorities for the partnership;
- Mutual Benefit – explicit understanding of the benefits to each partner organization, including advancing their own agendas, successfully taking on issues that they were unable to tackle alone, growing their skills, enhancing their reputation, or other benefits; and
- Mutual Appreciation – reciprocal acknowledgment of the value of each partner's contribution to partnership activities.

Building on this foundation, the partner organizations can come together and create value by combining their complementary and diverse strengths, resources, and interests to address

issues that were beyond their scope individually. Without these three elements, partners lack a guiding framework for their collaboration and are subject to competition and turf protection (Trauger, p. 115).

The parties should document their shared understanding in a memorandum of understanding, partnership agreement, or otherwise. This written statement should also contain an expectation about the duration of the partnership – whether definite, project-based, or open ended – so that there is an explicit understanding of commitment and exit strategy. The partnership's founding document should be adopted by all parties early in the process and should act as a North Star to the partnership. A partnership that cannot reach such agreement on core principles should continue to explore their mutual interest and shared vision and address the hurdles for partnering. If potential partners continue to struggle with even the most basic agreements – despite creative problem solving – then they should *not* move forward with a formal partnership at that time. Instead they might look for opportunities that require a lesser form of commitment, such as communicating about independent efforts on a conservation project to see if future coordination is an option, or possibly partnering for a single event. Such examples offer lower-risk opportunities to build connection and shared experience between entities to test the waters for future partnership.

## 2. Clear Communication

Clear and consistent communication, both internal and external, is essential to successful partnering (Toupal, p. 12; Trauger, p. 116). Partners must communicate regularly with one another to function coherently and cohesively. This communication includes day-to-day operations and coordination, priorities and strategies, and regular updates on partnership activities. Successful partnerships develop structures that support transparency and constructive interaction, particularly in giving and receiving feedback, handling conflict, and making decisions. *Transparency* means that partners can rely on one another to communicate directly (speak to one another rather than about one another), that the decision making process is open, and that relationships are clearly defined (Tennyson, p. 6). *Constructive interaction* demands of all participants an awareness of the means of communication, style, and language they use. This is particularly important when discussing areas of difference or conflict.

Communication is enhanced when:

- The partnership adopts explicit “rules of engagement” for communication in order to create an arena for discussion and debate in which it is safe to disagree without damaging relationships. This atmosphere will take advantage of the rich diversity of opinions.
- The partnership communicates its vision both internally and externally, ideally in the form of a compelling narrative that conveys the essence of the vision and the value of the partnership. Partner commitment to the shared goals as articulated by this shared

message can also increase individual participant identification with and commitment to the shared goals and may reduce intra-partner competition.

Key leadership and management roles must have or develop strong constructive communication and self-management skills. Outside facilitation should be brought in when difficult conversations are on the horizon or if communications break down.

As noted above, for a partnership to reach its potential it must be unified by a shared vision that translates into a common objective toward which the partner organizations work together. The leadership of the partnership must communicate this vision internally and externally. The means of communication may effectively take the form of a compelling narrative that conveys the essence of the vision. In some cases, the partnership may want to distill this narrative into a “brand” that communicates succinctly the value of the partnership to the outside world.<sup>1</sup> This shared brand/message may increase individual participant identification with and commitment to the partnership and may reduce intra-partner competition and turf protection. Strong partnership brand/message supports individual participants in representing the agenda of the partnership to management of the member organization. And last but certainly not least, if the partner organizations elect to create a public presence for the partnership, a strong brand can help create public support and interest as well as growth of sustainable funding.

### **3. Diversity and Trust**

Conservation partnerships grow out of a recognition that the issues at stake often involve multiple interests and that the best solutions involve multiple stakeholders – scientists, conservationists, policy advocates, landowners, governments, etc. (Margoluis, p 1). Moreover, current crises are too challenging to be solved alone (Trauger, p. 115). Partnerships among diverse interests and expertise promise the greatest conservation success, and also pose significant challenges. The differences in skills, experience, perspective, and culture can lead to disagreements (over goals, priorities, strategies), miscommunication, and competition, among other things. In addition to these risks, each partner organization invests its time and talent (Trauger, p. 114), sacrifices some of its autonomy regarding to partnership projects, and puts its reputation at stake (Tennyson, p. 10). Moreover, because the partner organizations are usually engaged in a larger body of work beyond the work of the partnership, members are constantly balancing partnership priorities and needs with those of their organization. Respect for and appreciation of diversity – both institutional and personal – is critical to creating the alliances and relationships required for successful partnering. Partnerships that truly value diversity and view it as an asset, collaborate better over time.

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<sup>1</sup> “Branding” may not be necessary or desirable, depending on the priorities of the partner organizations and on the strength of their individual brands. Rather than potentially dilute their separate brands by developing a shared brand, the partnership may choose not to adopt a unified partnership brand. Nonetheless, communicating their shared vision internally and externally is essential.

In order to tolerate all the risks inherent in partnership, organizations and individuals must trust one another (Toupal, p. 19). However, differing organizational cultures and accountability structures can lead to difficulty navigating conflict and create barriers to trust. Partners need to have the sorts of challenging interactions that take them to an edge – constructively – so they can learn their range of trust. Each time partners engage and stretch, they increase trust and, ultimately, their resilience.

Developing trust takes time and requires transparency and constructive interaction (see Communication above), and perceived equity. Equity does not mean equality; rather, it means that each partner has a seat at the table, regardless of size or status or finances (Tennyson, p. 6; Trauger, p. 116). For this seat at the table to be meaningful, it must be accompanied by explicit recognition of the value of each partner organization. We recommend documentation of partner equity in the memorandum of understanding or partnership agreement.

#### **4. Empowered Leadership and Effective Decision Making**

When partner organizations come together, each organization sacrifices some of its autonomy and control over partner projects. Coming from different perspectives and cultures, each must be open to influence by the others in order to take action as a partnership. The most effective partnerships have strong leadership (Margoluis, p. 3). However, leadership roles and functions may change over time depending on the needs of the partnership. Leaders may stand for the partnership mission and values, coach partnership members, empower partnership members, and broker decisions among partner organizations or individuals (Tennyson 2003, p. 18). In any event, leadership requires both sensitivity to the other members of the partnership and a capacity for self-management.

Decision making is frequently a challenge for partnerships. Divergent priorities, goals and perspectives often give rise to disagreements among partners. In addition decision making processes must balance the differences in chains of command of each partner organizations with the need of the partnership to make decisions and take action – even where difference of opinion exists among partners. Participants must recognize at the outset that there will be trade-offs and be explicit in their choice of management and decision making structure (see e.g. Tennyson, p. 20).

Decision through consensus is often correlated with successful partnerships (Toupal, p. 21); however, getting buy-in from all members of the partnership may be difficult and/or cumbersome. To maximize efficiency without sacrificing inclusion, decisions should be made at the appropriate level, so that no more individuals or organizations are involved in a decision than necessary (Margoluis, p. 3). It may be helpful for partners to determine at the beginning of any partnership project what level of involvement from each partner is appropriate. The least level of involvement is *communication* – where partners simply agree to inform one another about their activities. More unity is implied by *cooperation*, in which partners agree to work together or help one another. *Collaboration* creates a more formal and coordinated effort. And *unity* requires commitment of all partners to a shared goal (see Partnership Unity Spectrum

Fig. 1). Determining the level of involvement provides guidance for the level at which decisions should be made and how much agreement is involved.

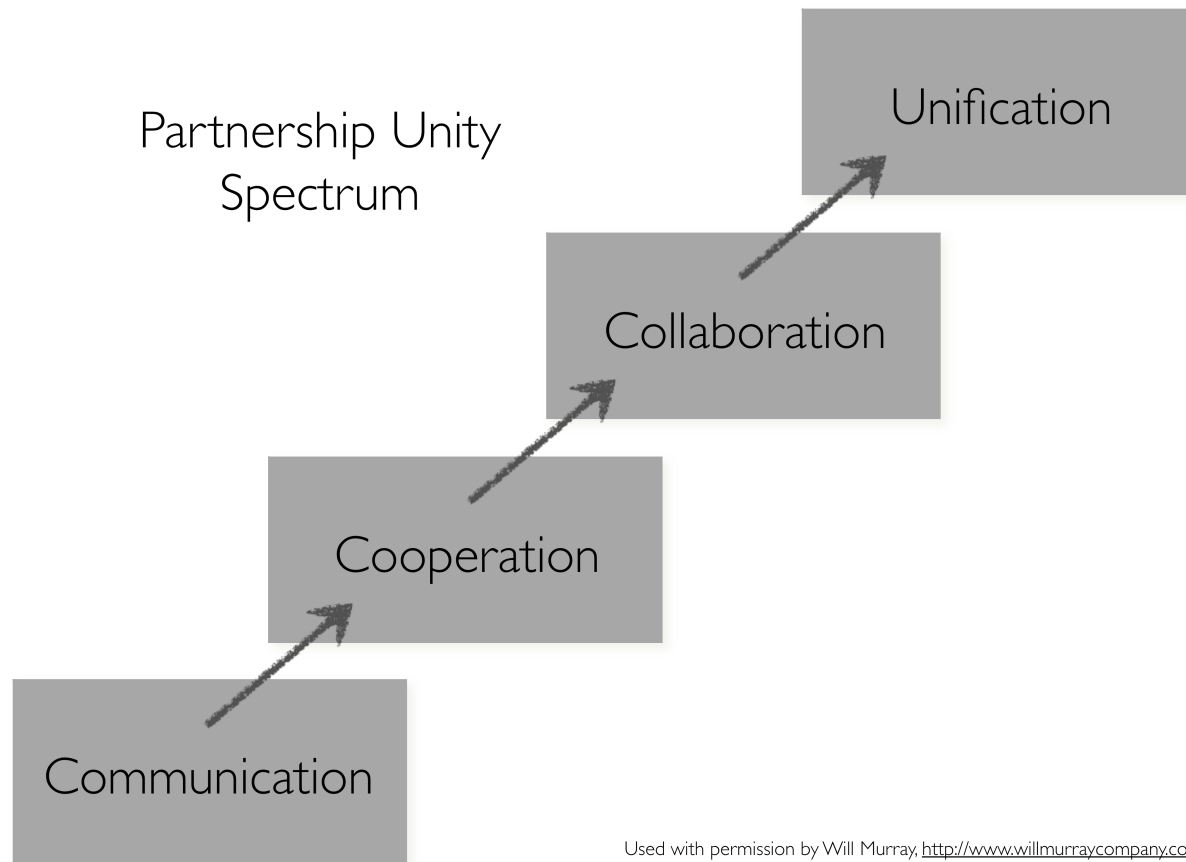


Fig. 1 Shows the four types of partnership from less formal to more formal.

## 5. Accountability and Evaluation

*Accountability* in partnerships, like in any organization, requires clearly defined roles and responsibilities, committed participation and high follow-through. Accountability begins with defining partner projects and defining the roles and responsibilities of partner organizations and individuals. Clearly defined and articulated roles and responsibilities permit the participants to be aware of and comfortable with their roles and committed to their responsibilities (Margoluis, p. 5). A formal agreement (memorandum of understanding or partnership agreement) documenting the roles and responsibilities of each partner helps create the transparency discussed above and supports strong accountability. Clarifying the appropriate level of involvement by partners simplifies communication, manages expectations, and identifies clear pathways for follow up and evaluation.

Ongoing evaluation is critical to assessing the success of the partnership in working together and accomplishing its goals. Regular evaluation will keep organizations accountable to one another and will permit the partnership to adapt and improve. For an evaluation process to be rigorous, it requires clearly defined roles and responsibilities, appropriate measures of productivity and structures for evaluating and adapting based on performance. Beyond this, partnerships must create a mechanism for incorporating and learning from their evaluation if they are to achieve the aims of adaptive conservation strategies.

## **6. Adaptability and Creativity**

Conservation partnerships must be adaptable (Trauger, p. 116; Toupal, p. 195). They need to be able to respond to changes in unforeseen changes in the natural, social, political, and economic climate (Margoluis, p. 5). This requires management processes that support making and executing decisions in a timely manner and leadership that has the trust of the partner organizations. In addition, the goal of adaptive conservation science is to continually revise improve strategies as needed based on regular monitoring of the outcomes of their conservation efforts. Accomplishing this goal requires that participants determine appropriate measures, create a mechanism for monitoring, and regularly review their strategies in light of this information and adapt their strategies accordingly.

Adaptability means more than just *reacting* to feedback and findings, and adjusting accordingly. Vibrant partnerships should also anticipate and embrace change by being *creative* and *proactive* in their strategies. Most successful partnerships are proactive and involve action beyond what is required by regulation or policy (Trauger p. 118). These qualities are particularly relevant in environmental and conservation issues due to the pressing time constraints and, quite literally, the changing landscape.

## **7. Sustainable Resources**

Last but not least, a viable partnership must have adequate resources – personnel, expertise, equipment, information, technology, and funding (Trauger, p. 116). Each partner voluntarily commits to sharing resources, both the internal resources that each contributes and the external funding that the partnership receives. These commitments need to be clearly understood, and accountability – both regarding expenditures of funds and regarding other resource commitments – should be laid out clearly. In the interest of equity, the partnership must value the contributions of all alliance members.

Conservationists are all too aware of the need for sustainability. With this in mind, partnerships need to cultivate sustainable practices in support of their aims. Strategic planning must look beyond short-term needs and goals, and funding requests should include realistic estimates of the resources required for success. In addition, the partner organizations should be mindful of maintaining adequate resources – particularly human resources and financing – in committing to partnership projects. Once the partnership has secured funding it should only expand the

scope and scale of the partnership at a pace that matches the funding available. Furthermore, for a partnership to thrive, individual organizations should be stable, independent of the partnership. A chronic lack of stability (abnormal and disruptive turnover in personnel, or short-term challenges in funding) in an individual organization could impact the larger partnership if persistent and should be addressed directly for the sake of the partnership.

## Conclusion

In light of the urgent need for conservation today, is it imperative that a wide range of resources and talents work together. These seven principles provide a roadmap for bridging differences and navigating common pitfalls in conservation partnerships. **Mutual interest** and **shared vision** create the alignment needed for collaboration. **Clear communication**, both internal and external, maintains alignment and smooth functioning. Recognition and appreciation of **diversity** combined with a strong foundation of **trust** fosters a productive and positive atmosphere. **Empowered leadership** and **effective decision making** balance efficiency and inclusion. **Accountability** and routine **evaluation** provide valuable feedback on goals and objectives. **Adaptability** and **creativity** beget breakthrough thinking and innovation. **Sustainable resources** – both human and financial – maintain the foundation of a viable partnership.

Together, these seven principles create a robust and flexible framework in which diverse organizations can come together and multiply their impact on the complex and ever-changing conservation landscape.



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