

PARTNERING TO PRESERVE WILDLIFE HABITAT: CASE STUDIES AND BEST PRACTICES



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CONTENTS

Section 1: Executive Summary.....	3
Section 2: Methodology.....	4
Section 3: Case Study Executive Summaries.....	6
Section 4: Best Practices.....	7
Appendix A: Greater Uwharries Conservation Partnership Case Study.....	20
Appendix B: Interagency Grizzly Bear Committee Case Study.....	26
Appendix C: South Coast Wildlands Case Study.....	32
Appendix D: Sample Structure for Partnership Charter.....	37
Appendix E: Additional References.....	38
Acknowledgements.....	39

SECTION 1: EXECUTIVE SUMMARY



Wildlife protection and habitat preservation issues often cross physical boundaries of natural areas spanning local, state, federal, and private lands. As a result, partnerships are often promoted as the best way to address these broad reaching needs. But what is a partnership? How can a successful partnership be formed? And how can it work to protect wildlife habitat?

In order to help answer these questions, three case studies of successful partnerships were conducted. Although these three examples do not cover the entire spectrum and structures of partnerships, they do represent diversity in geography, focal species, partnership structure, duration, and activities. Many lessons can be distilled from reviewing these three diverse examples.

Commonalities of successful partnerships have been identified and those areas are explored here. Broad categories include:

1. Assessing the environment,
2. Considering your partnership's membership,
3. Having a clear purpose,

4. Organizing appropriately,
5. Communicating well,
6. Acquiring necessary resources, and
7. Sharing rewards and celebrating successes.

Elements from the case studies are tied to each of these categories in order to illustrate successful practices. An additional category was created to specifically address issues related to wildlife habitat protection.

This paper shares best practices for partnerships but tries not to be prescriptive. There are many variables including physical scope, protection goals, type of partners, etc. that affect how a partnership should be structured. Therefore, this paper should be viewed as a guide and a starting point for wildlife practitioners and land managers to explore potential partnerships, recognizing that flexibility and adaptability is essential for developing partnerships.

SECTION 2: METHODOLOGY

This briefing paper is intended to serve as a guide in providing practical steps that a protected area manager might take, as well as issues he/she might consider, when starting or entering into a partnership with the goal of protecting cross-boundary habitat. The vast majority of partnership issues and lessons learned are applicable to a variety of scenarios despite varying geography, species, or types of partners engaged.

Three case studies of successful wildlife habitat preservation partnerships were conducted. These case studies were compared with well-known best practices of partnerships. Key lessons learned and experiences were highlighted to provide wildlife practitioners with a useful guide and specific steps for engaging in partnership activities.

Case Studies

The organizations selected to participate in the case study were chosen in order to achieve a representative mix of the following variables:

- Geographical location and reach
- Length of partnership
- Habitat protection goal
- Organizational structure and management entity
- Availability of funding and other support
- Type of partners (i.e., non-profit, government)
- Success at meeting goals

The investigation of each organization included interviews of 4-6 people involved with the organization, including (but not limited to) the founder, one or more paid staff or personnel, and one or more partners. Each case study author followed an interview guide that prompted questions on the organizational structure, funding and support scheme, type of partner, level of partner involvement or engagement, habitat protection methods, and key challenges and successes of the organization. Though the organizations were very different in scope and structure, many of the lessons learned were consistent across all three.

While the case studies are summarized in the next section of this report, the full case studies are located in Appendices A, B, and C, and include key lessons

learned and useful resources for each case study. The spectrum of case studies are intended to represent common partnership situations a protected area manager might encounter, and to complement the best practices identified.



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Best Practices

To provide a framework for the best practices section, the Fieldstone Alliance's resource, *Collaboration: What Makes It Work*, is used as a guide. This resource identifies twenty factors evident in successful partnerships. These factors are combined into six broad categories that are used to frame the discussion about best practices.

Within each category three items are provided:

1. A description of the best practices,
2. Case study examples as illustrations of best practices, and
3. Suggested action steps.

Additional categories have been included in order

to highlight specific findings revealed through the case studies. These new categories include some general partnership factors and others specific to wildlife habitat preservation activities. These include specific tools, resources, and processes. A discussion is provided for each factor as practitioners are likely to encounter these issues or areas in their work.

Defining Partners

According to Merriam-Webster dictionary, a partner is defined as, “one associated with another, especially in action.” Partners, as well as partnerships, can be defined in many ways depending on the purpose and intent of the collaboration. During the course of the investigation it was discovered that each organization defined their partners differently.

Most, however, whether formally or informally, had a sliding scale for partners which defined their level of engagement.

In the context of these case studies and best practices, a ‘partnership’ will generally refer to the organizing entity which serves as the catalyst for bringing together local and regional partners to discuss a common topic. A ‘partner’ will generally refer to those cooperating organizations which have at least a base level of engagement – that is, they attend meetings, contribute resources, and participate in decision-making.

JEFF BRANSFORD



SECTION 3: CASE STUDY EXECUTIVE SUMMARIES

Each case study highlights: the organization, its partners, its mission, when and how the partnership was founded, general habitat protection issues, and how the partnership was organized to address those issues. Each case study concludes with lessons learned from its experiences. These lessons are referenced and expanded on in Section 4 as Best Practices. For the full case studies, refer to Appendices A, B, and C.

Greater Uwharries Conservation Partnership, North Carolina

The Greater Uwharries Conservation Partnership (GUCP) is focused on a geographic region, the Greater Uwharries region of the North Carolina Piedmont, rather than a particular flora or fauna. GUCP's mission is the long-term conservation and enhancement of biological diversity and ecosystem sustainability throughout the Greater Uwharries landscape. GUCP is made up of 12 partners from federal agencies, state agencies, and non-profit organizations. GUCP does not have the authority to carry out any specific projects. Instead, it provides a structured, communicative forum for collaborative action among partners. As GUCP receives no funding, it relies on the time and resources contributed by the individual partners. Key elements of GUCP's methodology include a collaborative decision making process in which no partner is forced to take any action, utilization of GIS mapping to identify areas of overlapping interests, engagement with non-traditional participants, and utilization of a particular set of habitat protection strategies. Specific results of the GUCP include: 1) inclusion of conservation of natural resources in county planning processes, 2) increased landowner participation in conservation and land management through farm bill programs, and 3) the acquisition of the King Mountain property that links several disjunct parcels of the Uwharries National Forest.

Interagency Grizzly Bear Committee, Montana

The mission of the Interagency Grizzly Bear Committee (IGBC) is to help ensure recovery of viable grizzly bear populations and their habitat through interagency coordination of policy, planning, management, and research. IGBC grew

from a strong base of political support and is often considered one of the long-term success stories of interagency partnerships. Its organizational structure and communication methods with partners have contributed to their successes and quality of decision making. However, many of their successes could not have been accomplished without a strong base of objective, neutral, and consistent scientific data to inform their decision-making. Since the IGBC began its work, none of the five ecosystems in which it works has seen the grizzly bear go extinct. In some ecosystems, there has been a measured increase in the number of bears, and the grizzly has been de-listed in the Yellowstone ecosystem. Clearly, the group has seen success, but there is still work to be done.

South Coast Wildlands, California

The South Coast Wildlands (SCW) is a non-profit organization whose mission is "to protect and restore systems of connected wildlands that support native wildlife and the ecosystems upon which they rely." To this end, they are working as the lead partner for the South Coast Missing Linkages project. The goal of the Missing Linkages project is to work in the South Coast eco-region (from Bakersfield, California to the Mexican border) to conserve ecosystem processes and functions for all plants and animals native to the eco-region, including over 400 endangered and sensitive species. SCW has worked with federal, state, local and non-profit organizations to achieve their mutual goals. Through a transparent, collaborative, science-based process they have successfully mapped key linkages and wildlife corridors to sustain ecosystem processes for a wide variety of species. Linkage projects include large mega fauna such as puma and peninsular bighorn sheep, as well as small mammals, birds, reptiles, amphibians, fish, invertebrate species, and plants. SCW has gathered and shared data from partners and engaged stakeholders, serving as a catalyst for directing funds and attention toward the protection of ecological connectivity for the South Coast eco-region. One tangible example of SCW's success is the Tehachapi connection to Los Padres National Forest. Through the linkage design's identification of important habitat, a private ranch company was convinced to conserve 240,000 acres of land.

SECTION 4: BEST PRACTICES IN PARTNERING TO PRESERVE WILDLIFE HABITAT



JIM PEACOCK/NPS

The three case studies highlight commonalities in lessons learned and best practices in partnering for preserving wildlife habitat. Referencing partnership literature and established definitions of partnership provides a framework for discussing partnership activities and goals. Specifically, the Fieldstone Alliance publication, *Collaboration: What Makes It Work*, will be cited to help frame this discussion. Reviewing the spectrum of partnership models below, provides key characteristics of successful partnerships that are illustrated in the three case studies.

Using the case study examples, specific best practices will be discussed in the context of protecting wildlife, and will provide useful steps for practitioners to consider when creating partnerships. In addition to discussing partnership best practices, additional areas of consideration specific to wildlife habitat are included. These include specific tools and practices for addressing wildlife habitat issues.

The Spectrum of Partnerships*

When discussing partnership efforts, it is important to note that a spectrum of activities can occur between partners, ranging from cooperation to coordination and, at the pinnacle, collaboration. Within the context of the case studies and best practices provided, it is assumed that the desired state of the partnership is collaboration. Reviewing definitions of cooperation, coordination, and collaboration helps distill the key elements of collaboration that make these partnerships most successful.

Cooperation is characterized by informal relationships that exist without a commonly defined mission, structure, or planning effort. Information is shared as needed, and authority is retained by each organization so there is virtually no risk. Resources are separate, as are rewards.

Coordination is characterized by more formal relationships and an understanding of compatible missions. Some planning and division of roles

*For the purposes of this paper, partnerships and collaboration are used synonymously.



JIM PEACOCK/IPS

are required, and communication channels are established. Authority still rests with the individual organizations, but there is some increased risk to all participants. Resources are available to participants and rewards are mutually acknowledged.

Collaboration connotes a more durable and pervasive relationship. Collaborations bring previously separated organizations into a new structure with full commitment to a common mission. Such relationships require comprehensive planning and well-defined communication channels operating on many levels. Authority is determined by the collaborative structure. Risk is much greater because each member of the collaboration contributes its own resources and reputation. Resources are pooled or jointly secured, and the products are shared.”

Extracted from, *Collaboration: What Makes It Work* (2001).

Identifying Best Practices

The Fieldstone Alliance lists twenty factors for partnership success that can be divided into six overarching categories.

1. Environment
2. Membership Characteristics
3. Purpose
4. Process and Structure
5. Communication
6. Resources

Each of these categories will be discussed and best practices will be explained. Where possible, specific examples will be drawn from the case studies to highlight real world examples of partnership best practices. Finally, specific action steps for creating successful partnerships will be listed. It is important to remember that each partnership’s purpose and members are unique. As such, the examples and steps are intended to serve as a guide for thoughtful entry into a new partnership, not as a prescriptive set of steps ensuring success.

Two additional categories, which were not mentioned by the Fieldstone Alliance, have been added to this paper. One category is a general item for all partnerships, and the other addresses topics specific to wildlife practitioners.

7. Sharing Rewards and Celebrating Success
8. Specific Considerations for Wildlife Habitat Partnerships

1. Environment

When considering a new partnership, it is important to survey the field of existing partners. Some existing partnerships may be reoriented to serve a newly identified need. Other times, new partnerships should be established and a new array of organizations should be invited to the table.

South Coast Wildlands

When establishing a new partnership, it is possible to build off of existing success and collaboration efforts. In the case of SCW, a statewide conference was held to address wildlife habitat connectivity issues. This initial activity was sponsored by several partners and served as the launching point for a broader reaching partnership. The continuity in leadership from this initial activity through the formation of the new organization and its eventual work established a feeling of legitimacy for SCW and its future endeavors.

Greater Uwharries Conservation Partnership

Prior to the formation of the GUCP several partners already had a loose network based on existing conservation efforts, including connecting the Uwharries trail. While not imperative to the group's success, members indicated that these existing relationships enabled the partnership to develop more quickly. In conducting their work, GUCP and its members are fact based, inclusive, transparent, and act in a spirit of oneness. This level of openness and sharing has helped the GUCP become more effective and has increased its level of credibility within the local community.

SHANE FARNOR



Interagency Grizzly Bear Committee

In surveying the field of potential partners, it is important to consider the political and social climate within which the project will operate. An advantageous social climate helped position the grizzly bear as an endangered American icon. Additionally, political support from all levels of bureaucracy contributed to the success of IGBC's efforts. The signing of the IGBC Charter by the Secretary of the Interior demonstrated top-level support. This in turn encouraged individual agency representatives to take the initiative seriously and invest their time, people, and resources.

Suggested Steps:

- Assess the political/social environment and how that environment will impact the partnership.
- Identify the partnership's goals and find out who is already doing work in that area.
- Assess opportunities to leverage existing relationships and build on past successes.

2. Membership Characteristics

When officially reaching out to new partners, it is important to be aware of who is included and who is not included. Invited members should feel they can benefit from the proposed partnership, yet they must be willing to compromise at times to reach the partnership's goals. The partnership should be established to meet these two aims simultaneously.

Establishing trust and respect between all parties will benefit the partnership. These attributes of the partnership may need to be built up over time. Selecting partners that exhibit or have the potential to exhibit these characteristics will provide a sound starting place for the intended partnership.

When identifying specific partners, it is important to include representatives from key regions, subject areas, taxonomic groups, etc. to provide appropriate diversity. Traditional partners that may address these needs for wildlife habitat projects are included in the table below.

Federal Agencies	State Agencies	Non-Profit Organizations	Other entities
National Park Service	Soil and Water Conservation Districts	Land Trusts	Local landowners
Forest Service	State Division of Forest Resources	Conservation groups	Local Government
Fish & Wildlife Service	State Parks	Environmental Organizations	County Government
Bureau of Land Management	Fish and Game		Large Regional land owners
Army Corps of Engineers	Transportation Agencies		

In addition, consider including other non-traditional partners. Reaching out to non-traditional groups may help in gaining their buy-in and achieving long-term goals. Suggestions include: developers, businesses, local and county government, agriculture, timber industry, etc. Some of these groups may not be as “friendly” towards the partnership goals; however, their involvement may be critical for successful project implementation.

Finally, member partners are more likely to compromise and be fully engaged if they believe their involvement in the partnership is in their organization’s best interest. Therefore, benefits gained from such a partnership should offset member’s perceived costs, such as invested resources and loss of sole decision-making authority.

Greater Uwharries Conservation Partnership

In the development of a partnership there tends to be natural tension between sections of the community that will be impacted by the partnership’s conservation efforts. GUCP addressed this inherent conflict by limiting the Steering Committee to “friendly” conservation oriented groups, while allowing non-traditional groups to participate with GUCP at the Working Group level (action oriented, non-decision making entity). By doing this GUCP engages with a large cross section of the community but does not let engagement with potentially antagonistic groups hinder GUCP’s efforts.

South Coast Wildlands

The SCW partnership built its work around establishing trust with its partners and creating a forum where partners could work towards mutual goals. Partners discussed the benefits of joining the partnership and how the work of SCW extended the reach of each individual organization. For example, the collaboration provided additional resources (such as GIS) and generated maps each partner could use.

Interagency Grizzly Bear Committee

One intangible that unites IGBC partners, particularly at the ground level, is their passion for the work. When partners are passionately committed to a cause, such as protecting grizzly bears, a focused effort to further that cause is in their self-interest. Furthermore, many partners would not necessarily have access to the time, money, technical expertise, and/or policy-influencing authority in their stand-alone agency. This access to additional resources has helped ‘sell’ the partnership and helped further collaboration.

Suggested Steps:

- Reach out to both traditional and non-traditional groups.
- Limit partners to “friendly” groups and engage more potentially adversarial stakeholders as participants in an advisory capacity, such as Working Groups.
- Good potential partners include land trusts, conservation groups, federal and state wildlife agencies, any public or private entity that is a big landowner in the region, and groups already working with local landowners (e.g. soil and water conservation districts, state division of forest resources, etc).
- Consider the values your partnership should uphold and make sure potential members support those values.
- Consider the ability of potential partners to find common ground and compromise to meet common goals.
- Underscore the value of the partnership, and emphasize resource sharing as a key benefit to the partners.

3. Purpose

It is essential that the mission and objectives of the partnership are clearly articulated and agreed upon by all partners. The goals and objectives should be clear and realistic. Ideally, the mission will fulfill a need that individual partners cannot achieve on their own, and each partner should understand how they can contribute to this mission.

The time at which a mission statement is written may vary. Sometimes the mission statement will precede the partnership, and other times the partnership will define the mission collaboratively. Regardless of when the mission is written, all partners need to be in agreement about the purpose of the partnership and how that purpose will be fulfilled.

Creating a shared vision may be one way to overcome organizational differences and find common ground for establishing a partnership. Using a neutral facilitator is one way to quickly foster the desired common ground. This facilitator should be someone outside of the partnership, but if funding is limited, someone within the intended partnership can facilitate if they can remain neutral for the purpose of finding common ground among the group.

Ultimately, the mission can be revisited at times to focus efforts on the larger group goal. When disagreements occur or issues arise, reverting to the established mission and objectives will refocus the group.

Greater Uwharries Conservation Partnership

GUCP’s purpose is to “work for the long-term conservation and enhancement of biological diversity and ecosystem sustainability throughout the Greater Uwharries landscape compatible with the land use, conservation and management objectives of the participating organizations and agencies.” While each of GUCP’s partners comes to the partnership with their own mission and goals, GUCP’s mission statement provides a shared vision that enables the partners to identify collaborative opportunities that support the group’s agreed upon objective. At the same time, GUCP’s mission expressly recognizes that each partner comes to the partnership with their own goals and states that no partner will be asked to participate in an activity that is incompatible with their individual goals.

Interagency Grizzly Bear Committee

The agencies that partner to form the IGBC all share similar goals, but their missions are not the same. The IGBC partnership, for example, enables the state wildlife agency in Montana to partner with the U.S. Forest Service and to focus their efforts in pursuit of a common goal – protection of the grizzly bear. In this way, they can combine their resources – for example, Forest Service could provide access to bear habitat, and the state wildlife agency could provide the staff to carry out technical monitoring. Alone, neither of these resources holds the same value.

4. Process and Structure

Suggested Steps:

- Work to quickly identify the common interests among the partners as well as what the various partners want the partnership to do.
- The partnership's mission should be clear, actionable, and unique from the missions of the partner organizations.
- Consider a neutral facilitator to help guide partners in the formulation of the partnership mission statement.
- Revisit the mission and objectives frequently to focus the partnership.

Process

It is important to recognize that most partners will already be engaged in habitat protection issues. As a result, one of the primary values of the partnership is that it creates a forum for the various partners to develop collaborative working relationships. Consequently, all partners should come to the partnership with a conscious intention of building those relationships.

As previously mentioned, clearly defining partner roles, what resources partners will bring to the table, and how active they will be is important for the success of the partnership. If clear expectations are set then they are more likely to be achieved. This structure should be balanced with a high level of flexibility and adaptability in order for the partnership to respond to external forces.



JIM PEACOCK/NPS

Decision-Making

The recommended form of decision-making is through consensus – decisions require agreement among all partners. This ensures buy-in and encourages partners to participate without fear of being forced to do something they do not want to do. Using a facilitator, someone either internal or external to the group, will help the group work through conflict and reach consensus more readily.

Adoption of Appropriate Time Frame

All participants should understand that creating a partnership for habitat protection is a long-term investment and that significant benefits of the partnership may not be realized for several years. It can take over a year to establish a formal partnership agreement and one to two years to work through the partnership's initial steps in habitat protection. For example, the GIS mapping process – which includes data collection, the creation of maps, and vetting them among the group – can consume six months to a year for one map. This potentially long time frame for accomplishing goals is important to impress upon the partnership group so immediate successes or failures are kept in perspective.

There are many variables which may affect the appropriate pace of development for a partnership effort. Some of these might include:

- Geographic spread of the protected area
- Geographic spread of the participating agencies and organizations
- Management entity of the partnership (e.g. Government vs. Non-profit)
- Number of partners involved
- Type of partners involved (e.g. State, federal, local agencies, non-profits, public, etc.)
- Difficulty of the goal
- Type of habitat protected
- Funding and resource availability

Structure

By no means is there one structure that can be applied to all partnerships. The following suggestions reflect the common elements between the case studies that have advanced the partnerships' success. Each partnership should be treated uniquely, and a corresponding structure should be created for each. All partnerships should define their structure, identify their decision-making process, and provide transparency.

Steering Committee – The Steering Committee (or Executive Committee) is made up of one representative from each partner, and elects a Chair and Vice Chair that serve for one to two years. The Chair's major responsibility is to guide Steering Committee Meetings, which are generally held once per quarter. An effective way to ensure a balance of power is to rotate the Chair responsibilities to a different partner each meeting.

Sub-Committees – Some groups are large enough – and have a large enough geographical spread – to need subcommittees that represent ecosystems or regions. Not all organizations will need this extra level of organizational structure. Sub-committees may be warranted for particular issues, opportunities, geographic sub-regions, or areas of expertise.

Working Groups – Working Groups are formed to address major issues and initiatives (such as scientific monitoring or educational programs), or to work within specific geographic areas or ecosystems. While the level of authority can vary, Working Groups generally have little decision-making authority and are formed to carry out objectives created by the Steering Committee. Each Working Group elects a Chair who guides meetings and reports on the activities of the Working Group to the Steering Committee. Non-partners can participate in Working Groups as deemed appropriate. Groups who might be considered adversarial are often included on at least a limited basis because they may be critical to eventual implementation.

Greater Uwharries Conservation Partnership

As one of its first orders of business GUCP began to develop a charter to clearly define the group's purpose, organizational structure, policies, decision-making, roles, and responsibilities. The existence of this charter has been of critical importance as it provides the framework for how the group functions, communicates, and conducts its business.

GUCP makes decisions by consensus. This means that just one partner may stop an action from being endorsed by the partnership. GUCP intentionally adopted this model because it increases the ability to attract desirable partners and avoids situations where a partner is forced to go along with an idea that they do not support. It is important to note that consensus based decision making for the partnership does not limit the actions of individual partners. Most projects are undertaken by a subset a partners without restrictions from the broader partnership.

South Coast Wildlands

SCW partners repeatedly emphasized the ownership they felt on the Missing Linkages Project. This is a function of the processes used by SCW, which provided the overall structure for creating the habitat linkage design maps and reports. SCW took the time to work with individual agencies, organizations, and scientists to explain the project process, solicit suggestions and information for generating the maps and reports, and ultimately sought stakeholder buy-in on the finished products.

Part of the project's success was due to the balance of structure and defined areas of flexibility. This



HOWARD GROSS

flexibility often occurred at the Working Group level looking at particular inputs to linkage design maps, where individual members were allowed to pursue their interests. Being open to stakeholder input as a part of the process furthered buy-in for the overall project goals.

Interagency Grizzly Bear Committee

One aspect of the partnership that helps the IGBC succeed is the involvement of agency partners at all levels; from researchers in the field to regional directors, there is ownership up and down the chain so that focus is not lost on conflicting agendas at different position levels.

The IGBC has a comprehensive set of managing documents that clearly lay out agency roles and responsibilities within the governmental Memorandum of Understanding structure. When new members rotate onto the committee, or into a leadership role (such as Chair), there is consistent information communicated to enable a smooth transition.

The IGBC has certainly gone through its evolution as a partnership. The current success story is underpinned by years of relationship and trust building to enable the success of this complex, multi-agency, cross-boundary, and multi-ecosystem collaboration.

Suggested Steps:

- Develop a charter that clearly defines the partnership's purpose, organizational structure, policies, decision-making protocols, roles, and responsibilities (see Appendix D for a sample).
- Invite a successful partnership group to present their experiences during the beginning of the charter development process.
- Consensus (one "no" vote vetoes the action) is generally the preferred method of decision-making as it guarantees buy-in and ownership.
- Have working groups focus on very specific topics to ensure that participants maintain a high level of interest and stay engaged.
- Especially in government, ensure that there is buy-in, (if not representation), from many different position levels of member organizations to mitigate bureaucratic constraints.
- Provide consistency of information so that roles and responsibilities are minimally impacted by member turnover.

5. Communication

Open communication is essential between partners, and between partners and external stakeholders. Regularly scheduled committee or Working Group meetings facilitate communication. It is essential that communication between groups be frequent and open to keep members informed and to influence the activities of the partnership.

The responsibility for formal communication should be clearly delegated. This position may be rotated so as not to overburden any one participant. Establishing clear lines of communication for the partnership – both internally and externally – provides timely information, prevents conflict, and allows new opportunities to be seized.

Not all communication needs to be formal. Informal communication methods are important for all partners to acknowledge and embrace. Partners should understand their responsibility to publicize the partnership's work in a way that encourages additional support.

In today's world, it is important to recognize the role that technology plays in facilitating communication. From regular email and list-serves, to Google Groups and informational websites, these technologies allow organizations to quickly disseminate information to many people in a short amount of time. Each partnership may use these tools to a different degree, but should recognize the importance of dynamic information exchange.

South Coast Wildlands

SCW structured communication with its partners through a series of habitat connectivity workshops. These larger meetings were conducted in a way to solicit input from a larger group of stakeholders, and engaged wildlife agencies, land managers and planners, scientists, and conservation organizations. These events provided a forum for SCW to inform stakeholders about the project, solicit their input, incorporate it, and proceed to the next project stage in a transparent way.



ALEX BRASH

SCW's website serves as a repository for the design linkages. Anyone can access the maps via the [website](#).

Interagency Grizzly Bear Committee

A consistent communication structure consisting of regular meetings of the Executive Committee, Subcommittees, and Working Groups not only facilitates planned information exchange and coordination of activities, but it also stimulates individual participants to think of new and creative ways to work together. Some of the best ideas for the group come from informal conversations at meetings and other get-togethers. At the Executive Committee level, a yearly retreat helps bring the issue into focus for the leaders who do not deal with it on a day-to-day basis.

Between formal meetings, information is exchanged at the Working Group level largely by email and phone. The administrative manager for the IGBC provides regular updates to the group via email, and helps to maintain a very comprehensive website on the organization. This website provides the public with up-to-date information on everything that's going on with the partnership, as well as a secure portal for closed information access for certain members.

Greater Uwharries Conservation Partnership

GUCP's Steering Committee and its various Working Groups each meet about four times per year. These meetings provide a formal structured environment for the partners to identify opportunities for collaboration, and enable partners to build relationships and informal communication links. These informal communication links, outside of the official Steering Committee and Working Group Meetings, are the ideal environment to capitalize on collaborative opportunities.

GUCP uses electronic technologies to communicate, including Google Group email lists created for each Committee and Working Group, and a wiki space for data and information sharing.

Suggested Steps:

- Establish formal communication methods.
- Hold meetings on a regular basis (Steering Committee, Sub-Committees, and Working Groups).
- Provide opportunities for and otherwise encourage informal coordination among partners in both formal and informal venues.
- Utilize technologies such as email, websites, and wikis to facilitate information sharing and communication.
- Establish methods for communicating the partnership's work to external stakeholder groups.

6. Resources

A strong partnership should have sufficient resources, including: 1) human, 2) financial, and 3) time and other materials. Each partnership will have a varying combination of these items to make it viable.

Leadership/Administrative Support

In order for the partnership to be effective, it must have strong leadership and administrative support. Most successful partnerships split these responsibilities between two people (one administrative and one leader). Ideally, given the amount of time required to effectively fulfill these roles, the individuals' involvement with the partnership is built into their job description. In each of the case studies completed, a minimum of one full time staff person was instrumental in providing leadership and/or administrative support to the project, helping to ensure its success.

Consistency

Partnership turnover frequently occurs as projects end or partner needs change. It is ideal to try to maintain consistency of administrative or leadership personnel for the partnership. This consistency keeps the partnership focused on the mission and vision of the initiative, keeps the learning curve short for new participants, and stops partners from having to re-learn or re-do work.

South Coast Wildlands

SCW – as an independent 501c3 – receives funding from federal, non-profit partners, and foundations. With this funding, SCW hired the staff necessary to conduct the Missing Linkages project. The staff provided continuity on the project that was essential to its success; it also provided a technical resource through one staff member's GIS work. Consistent leadership was provided through the Executive Director, supported by the Steering Committee.

Interagency Grizzly Bear Committee

Like many organizational initiatives, much depends on having a consistent, passionate, and fair leader with strong interpersonal skills. As the Chair of the Executive Committee of the IGBC rotates among the agency partners every few years, the role of consistent leader has fallen to the Grizzly Bear Recovery Coordinator, who serves as an advisor to the Executive Committee. The same person has been in this role since the Committee's inception and therefore provides not only consistency of leadership, but also of information.

Each agency partner recognizes, in part through the Memorandum of Understanding, the necessity of their relative contribution of funding, resources, and time. Funding is gained through each agency specifically for the purposes of IGBC activities, though the IGBC itself does not control funding. Funding by each agency for these activities can be through base appropriations (in the case of the Interagency Grizzly Bear Study Team), or project money (which is allocated, often with discretion, by each agency to the IGBC). Resources and staff time commitment are also allocated by agency discretion. Some positions, such as the Administrative Assistant or the Study Team Lead, are full-time IGBC positions which are fully funded by a particular agency partner.



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Greater Uwharries Conservation Partnership

GUCP receives no funding and has no partnership specific resources. All staff time, travel expenses, computer/office resources, lunches, office supplies, etc. are donated by the individual partners. While this model has been effective for GUCP, it is only because partners provide the following key resources: a member who commits significant time to much of the administrative work (coordinating, communicating, scheduling meetings, circulating the agenda, typing up minutes, etc.); a member who has skills in partnerships, group processes, and conflict resolution; a member with strong GIS mapping skills (this is a key tool in aligning partners' interests; and a strong grant writer.

Suggested Steps:

- Identify and secure critical resources (technical, financial, human, etc.).
- A minimum of one full time staff person should spend most of their time focused on the partnership.
- Select leaders (Chairperson and Vice Chairperson) via election or rotation that serve for a specified term.
- Ensure that at least one partner is skilled in partnerships, group processes, and conflict resolution.
- Clearly assign administrative roles and responsibilities.
- Ensure that at least one partner is skilled at grant writing.



ELIZABETH MEYERS

7. Sharing Rewards and Celebrating Success

It is important that partners experience the rewards of their endeavors and celebrate their successes. The appropriate publicity of the partnership's success and its key players helps to validate the role of the partnership. Positive publicity and celebrations will also help maintain partner enthusiasm, keeping partners engaged and invested in the partnership.

South Coast Wildlands

In the case of South Coast Wildlands, publications included the logos of all partners. When media publicity occurred on the project, the efforts were attributed to the partnership - fostering and legitimizing the partnership internally and externally.

Greater Uwharries Conservation Partnership

GUCP partners indicated that conservation work can sometimes seem like an endless battle. It is often difficult to stay positive, maintain focused on the potential for success (instead of the time invested), and keep criticism constructive. GUCP helps to relieve stress and tension by creating opportunities for the partners to have fun and recognize their accomplishments.

Suggested Steps:

- Celebrate successes no matter how large or small.
- Organize parties or other fun events outside of the work place to help build partner relationships.
- Give out awards to recognize outstanding contributions.
- Collaboratively publicize successes.

8. Specific Considerations for Wildlife Habitat Partnerships

Neutral, Objective Scientific Data

A successful wildlife partnership should develop, monitor, gather, and analyze objective and robust scientific data on specific habitat protection goals. This unbiased and collaborative data helps decision-makers to focus on policy, as opposed to numbers or facts.

Inter-agency Grizzly Bear Committee

The Interagency Grizzly Bear Study Team, which has been collecting data on grizzly bears in the Yellowstone ecosystem for decades, has been able to design and conduct studies in collaboration with federal and state agencies relevant to grizzly habitat in the Yellowstone ecosystem. As a result of combined efforts and agency involvement, more is known about the Yellowstone population of the grizzly bear than any other bear population in the world. Needless to say, it is hard for decision-makers in the Executive Committee to argue with the Study Team's recommendations when they come to the table.

Suggested Steps:

- Allocate resources toward establishing a strong scientific argument for the wildlife habitat protection plan or proposal.
- Collaboratively design robust methodology and consistently carry out scientific data collection with all cross-boundary partners.

Geographic Information Systems (GIS)

GIS mapping is an important tool for identifying and prioritizing habitat protection targets. In order to minimize contention within the group during GIS map development and to maximize credibility during map distribution to third parties, it is critical that the mapping process be based on sound, defensible scientific data.

Differences between various partners' priorities may emerge during map development; do not try to rush this process. While GIS mapping is an essential first step, it should not be assumed that all partners understand it or its value. Before GIS mapping is undertaken there should be a consensus on if it should be done, why it should be done, and what the goals are.

South Coast Wildlands

GIS was an instrumental tool in the creation of habitat linkage design maps and reports throughout the South Coast region. For each of the linkages, data was collected from a variety of sources, fostering ownership by several partners. When generating the maps, various data layers were considered and used to identify areas crucial to maintaining functional habitat connectivity. In this way, a transparent process was an important step in fostering buy-in for the project.

Using GIS provides another benefit. The maps that are created are useful for visually representing the concept of linkages. This helps with education and outreach purposes of the partnership.

Greater Uwharries Conservation Partnership

GUCP utilized GIS mapping as the foundation for defining partner's mutual interests, developing a list/map of preservation/restoration targets, and providing third parties with critical information. GUCP successfully completed this process in one year and learned several valuable lessons including: not starting the GIS mapping process until there is complete buy-in from all partners, and engaging key county agencies in the process as soon as possible.

Suggested Steps:

- Use sound scientific data and GIS mapping to define mutual interests and identify preservation targets.
- Consider using GIS maps to provide an effective visual representation of scientific data and conservation goals to third parties.
- Do not rush the GIS mapping process. Ensure that the partnership discusses what GIS mapping is, if it should be done, why it is being done, and what the goals are.

- Involve key non-partners, such as the county government, early in the GIS mapping process to enhance buy-in.
- The GIS maps should be viewed as living documents and updated based on new information and changing realities.

Habitat Protection Strategies

Habitat protection initiatives undertaken by the partnership are likely to employ familiar habitat protection methods. Specific habitat strategies for partnerships may include:

- Acquisitions and easements.
- Working closely with county planning and zoning offices to make sure they are aware of and consider natural resource protection issues in developing zoning and subdivision ordinances and land use plans.
- Technical guidance and assistance to landowners to encourage better stewardship and habitat enhancement through education and cost share funding such as farm bill programs and United States Fish and Wildlife grants.
- Influencing policy at the state and federal levels.
- Using scientific best practices for habitat protection, restoration, and remediation.

Interagency Grizzly Bear Committee

The IGBC has spent years refining its approach to habitat protection. Its approach differs slightly from traditional strategies because 1) many of its agencies own the land needed to protect habitat, and 2) the complexity of the issue, stretched over a wide geographic area, necessitates a complex approach. Therefore, the IGBC's approach to habitat protection can best be described as a strategic mix of scientific, political, and collaborative methods. IGBC collects scientific data to inform policy-makers and back-up their proposals, they create and maintain political and social buy-in at multiple levels, and collaborate to ensure consistent fulfillment of goals.

Greater Uwharries Conservation Partnership

GUCP uses the following three habitat protection strategies: acquisitions/easements, working with county planning and zoning offices, and providing technical assistance to land owners. GUCP has found this combination of strategies to be most effective and the most effective in leveraging its partners' resources. When working with landowners GUCP does not attempt to compromise private property rights. GUCP will direct landowners to an appropriate partner or third party based on the landowner's conservation/restoration goals.

Suggested Steps:

- Collaboratively design a robust methodology and consistently carry out scientific data collection with all cross-boundary partners.
- Identify and use the habitat protection strategies that best leverage the partners' resources.
- Identify and utilize habitat protection strategies that recognize each participating agencies limitations and opportunities to protect habitat.
- Recommend habitat protection strategies to include acquisitions/easements, working with county planning and zoning offices, and providing technical assistance to land owners.
- Work cooperatively with landowners by respecting private property rights and understanding their conservation/restoration goals.

APPENDIX A: GREATER UWHARRIES CONSERVATION PARTNERSHIP CASE STUDY

Organization

Greater Uwharries Conservation Partnership (GUCP)

Date Founded

The partners began discussions in January 2005, signed a memorandum of understanding in June 2006, and signed the GUCP Charter in January 2008.

Mission

To work for the long-term conservation and enhancement of biological diversity and ecosystem sustainability throughout the Greater Uwharries landscape compatible with the land use, conservation and management objectives of the participating organizations and agencies.

Partners

Federal Agencies	State Wildlife Agencies	Non-Profit Organizations
US Fish and Wildlife Service	North Carolina Department of Environment and Natural Resources – North Carolina	Environmental Defense Fund
US Forest Service	Natural Heritage Program	The Land Trust for Central North Carolina
US Natural Resources Conservation Service	North Carolina Wildlife Resources Commission	Piedmont Land Conservancy
	North Carolina Zoological Park	The Nature Conservancy
	North Carolina Plant Conservation Program	Central Park North Carolina (formerly Yadkin/Pee Dee Lakes Project)

General Habitat Protection Issues

GUCP’s mission is focused on a geographic region, the Greater Uwharries region of the North Carolina Piedmont, rather than a particular flora or fauna. While each partner may come to the Partnership with a particular set of interests, they are all interested in habitat protection in the Greater Uwharries. The goal of GUCP is to encourage cooperation where partners’ interests overlap in an effort to work for the long-term conservation and enhancement of biological diversity and ecosystem sustainability throughout the Greater Uwharries landscape. The primary process that GUCP utilized to identify shared priorities is geographic information systems (GIS) mapping.

Organizational Mission & Administration

GUCP is governed by a charter that specifies the Partnership’s mission, organizational structure, member responsibilities, decision-making process, and rules of order as follows:

GUCP is intended to provide a communicative forum for collaborative action among the partners. While GUCP does not have the authority to carry out any specific project, participants agree to:

- Promote a vigorous and broadly inclusive public discourse on the precepts underlying sustainable land use.

- Assess opportunities and work cooperatively to enhance, protect, conserve, and restore the sensitive and unique flora and fauna of the Uwharries region by identifying priority conservation lands and pursuing conservation options.
- Encourage projects that focus on protecting, conserving, and restoring the integrity of the landscape, air quality, and water supporting natural communities.
- Serve as an educational resource to private landowners, institutions, organizations, and the general public on land conservation and management tools and opportunities.
- Facilitate collaborative efforts and joint land management activities among members to achieve common conservation objectives across jurisdictional and ownership boundaries.
- Recognize and promote the vital role science must play in responsible sustainable land use.

Organizational Structure

GUCP is organized by way of a Steering Committee, Subcommittees, and several Working Groups. The primary purpose of the Steering Committee is to enhance collaboration among partners through quarterly, day long Forums. Forums provide a venue for partner organizations, stakeholders, and other interested parties to discuss common issues relating to GUCP goals. For example, sharing partner activities that relate to GUCP goals, coordinating on-the-ground activities for surveying, land acquisition, funding/grant requests, etc. Each partner designates one representative to the Steering Committee to vote on all actions before the Committee. The Steering Committee elects a Chair and Vice-Chair whose primary responsibilities are developing the agenda for Steering Committee Forums, distributing draft meeting summaries, and guiding the meetings of the Working Groups. The Chair and Vice-Chair are elected for a term of two calendar years. A secretary is chosen to take and circulate meeting minutes.

The Steering Committee can establish Subcommittees to address specific issues as needed. Subcommittees may consult with individuals with technical skills and information, but may not make decisions for the Steering Committee. Subcommittee findings are reported to the Steering Committee Chair.

GUCP has three Working Groups that represent defined geographic areas. Each Working Group develops targets and goals specific to their area that align with the larger goals of GUCP. Each Working Group elects a Chair from among its members who is responsible for reporting the activities of the Working Group to the GUCP Forum.

Member Responsibilities

The GUCP Steering Committee meets on a quarterly basis, and members agree to designate at least one representative to attend each meeting. Each Working Group is represented at Steering Committee Forums by their Chair or designee. Active participation in the Steering Committee and Working Groups by all partners is encouraged. An agenda, which attendees are expected to have read and be prepared to discuss, is distributed prior to each Forum.

Decision-Making Process

Proposed action items are distributed to all partners and Working Groups in advance of any voting sessions. Each partner has one voting representative on the Steering Committee with the right to vote “yes,” “no,” or “abstain.” The Steering Committee operates by consensus (meaning a single “no” vote acts as a veto and stops an action from being endorsed by GUCP). At least 6 out of 12 partners must be present to make decisions, and actions voted on must be emailed to absent representatives to give them the opportunity to vote.

Rules of Order

The following list of ground rules provides a foundation for constructive interaction:

1. Treat all members with courtesy and respect.
2. Speak one at a time.
3. Listen carefully.
4. Be clear and concise in your comments.
5. Stick to the agenda; avoid off-target discussions.
6. Be prepared to take part; be an active participant.
7. Be candid; it's ok to disagree.
8. Ask relevant questions.
9. Focus on the problem, not finding fault.
10. Separate interests from positions.
11. Don't bring hidden agendas.
12. Meetings adjourn on schedule or can be extended in duration by consensus.

Funding

GUCP receives no funding. Time, travel expenses, computer/office resources, lunches, and office supplies are all donated by the individual partners. While most partners spend a relatively small amount of their time on the Partnership, there are exceptions. For example, Kacy Cook from the North Carolina Wildlife Commission is assigned to GUCP on a nearly full-time basis.

History of the Partnership

While a number of the eventual GUCP partners already had a loose network through existing conservation efforts, the formal process to create GUCP began in January 2005. Between January 2005 and May 2006 the eventual partners met 5 times to establish the mission and goals of the Partnership and create three regional Working Groups to more effectively address on-the-ground projects. Members and a chairman were appointed to each Working Group, and several meetings were held to set goals and begin implementation. In June 2006 the partners signed a memorandum of understanding.

Between June 2006 and January 2008 the partners focused on defining their mutual interests, utilizing GIS mapping to identify preservation/restoration targets, and creating a charter. During this time, partners also focused on identifying synergies between individual partner projects.

In January 2008 all partners signed onto the GUCP Charter, which specifies the Partnership's mission, organizational structure, member responsibilities, decision making process, and rules of order. During the last eight months GUCP has matured to a point where the partners have shifted away from looking for synergies on existing projects and towards jointly designing new initiatives and projects.

Partnership Challenges

- The Partnership is lacking the human resources to follow through on all potential collaborative projects envisioned by the Steering Committee and Working Groups.
- GUCP initially tried to rush through the GIS mapping process. Not all partners were convinced that GIS mapping should be done, and some did not have a clear understanding of what was involved. This made the GIS mapping process longer and more contentious than it needed to be.
- During the formation of the Partnership, some partners were frustrated with all the time spent on developing the process and the framework for the Partnership (e.g. refining partnership boundaries, developing a charter, etc.) and wanted to spend more time addressing on-the-ground conservation issues.
- Some steering committee representatives do not live in the region and have had a hard time regularly attending meetings.
- The Partnership is still working out the relative roles of the Working Groups and steering committee. As such, occasionally there is disagreement regarding what the Partnership should or should not be doing.

Partner Communication Methods

The majority of formal communication occurs through the Steering Committee Forums and Working Group Meetings. Steering Committee Forums are held on a quarterly basis while Working Groups are now held three times a year, down from the initial quarterly meetings which proved to be a burden on partners. One benefit of formal meetings is that they create context and relationships for what has become the primary form of communication-informal communication between partners working on specific projects. Occasional communication also occurs through email with Google Group email lists created for each committee and Working Group. The Partnership maintains a Wiki Space for data and information sharing.

Approaches to Habitat Protection

GUCP uses the following three tools as the primary means for protecting habitat:

1. **Acquisition/Easements:** The fee simple acquisition of privately owned land, and the purchase of conservation easements.
2. **County Planning:** GUCP partners work with some county planning departments to make sure they are aware of and consider natural resource protection issues in developing zoning and subdivision ordinances and land use plans. The *Green Growth Tool Box* (see the Useful References section) is a tool that has been developed to assist in these efforts.
3. **Technical Guidance & Assistance to Landowners:** This tool encourages better stewardship and habitat enhancement primarily through education and cost share funding such as farm bill programs and USFWS Partners for Fish and Wildlife program.

One partner, the Environmental Defense Fund, also lobbies for conservation-friendly legislation and tax incentives.

Key Lessons Learned

The lessons learned from the GUCP case study can be categorized into Selecting Partners, Group Dynamics, Human Resource/Critical Skill Sets, and Approaches to Habitat Protection. The lessons learned in each of these areas are as follows:

1. Selecting Partners

- When selecting potential partners, identify the initial goal and then find out who is already working in that area.
- Good potential partners include: land trusts, conservation groups, federal and state wildlife agencies, large regional land owning entities (e.g. US Forest Service), and organizations/agencies already working with local landowners (e.g. soil and water conservation districts, state divisions of forest resources, etc.).
- GUCP chose to limit participation in the Steering Committee to the primarily “friendly” conservation groups. The involvement of timber industry, developers, agriculture, and other such groups was sought at the work group level when appropriate.
- Having a diverse group of interests among Partners sets the stage for a greater breadth of perspectives. However, it also challenges the group to remain focused on the shared goals and objectives of the Partnership.

2. Group Dynamics

- Identifying common interests among partners and discussing the objectives of the Partnership has been important for its success. GUCP chose to focus on fostering biological conservation – a common goal among partners. As such, GUCP was able to maintain a high level of engagement and has avoided alienating partnering groups.
- Establishing clearly defined partner and steering committee roles helps frame how the Partnership will function. Some partners of the GUCP wanted it to function as an informal information exchange forum rather than an organization that takes group actions. Many partners felt time spent discussing procedures was time wasted not doing conservation work. Time spent clarifying roles and responsibilities initially will secure a stronger partnership.

- GIS mapping is one of the most critical tasks and is the primary means to identify where partner interests are in, and not in, alignment. Don't jump into the GIS mapping process too quickly. While GIS mapping is a fundamental part in enabling the Partnership to function, there needs to be an upfront discussion about what GIS mapping is, if it should be done, why it's being done, and what the goals will be. This process can take up to one year for a group that is already working together, or up to two years if they are just starting to meet. Try to find a way to include county government in the mapping process as early as possible so they feel a sense of ownership.
- Making decisions by consensus is a good model as partners don't feel that they'll be pushed into anything they don't want to do. If one partner objects to a proposed action, each organization is still free to act individually, but there will be no action as a Partnership.
- Having another successful partnership group come in and talk at an early meeting can help inspire and teach.
- Each Working Group meeting should focus on a very specific topic to make sure those that attend are interested in the topic and stay engaged. It's a good idea to hold Working Group meetings close to the people you want to engage.
- Occasional parties or other fun events help deflate frustration. Awards can be used to recognize contributions and celebrations to recognize group wins.

3. Human Resources/Critical Skill Sets

- It is critical to have a person whose job is fully or at least partly dedicated to the Partnership to help with the coordination and administration (e.g. scheduling meetings, sending out agenda, and typing up minutes). Everyone is busy with existing work and added administrative tasks could detract from productivity.
- It is important to have an active partner who has skills in partnerships, group processes, conflict resolution, etc. Several of the individuals who were involved in the formation and evolution of the GUCP took a 1-1/2 year long course with the National Resource Leadership Institute at North Carolina State University which taught relevant partnership skills (see the Useful References section). Jeff Marcus used the initiation of the GUCP as his practicum project, and Kacy Cook used the development of the conservation target map as her practicum project.
- Strong GIS mapping skills are a true asset. GIS mapping forms the foundation for defining mutual interests, developing a list or map of preservation/restoration targets, and providing third parties with critical information. It is important that these maps be based on sound scientific data.
- It is helpful to have at least one partner who is good at grant writing. One partner will often be better positioned to obtain a given source of funding. At other times applying as a group can increase credibility.

4. Approaches to Habitat Protection

- Habitat protection should be pursued using a number of different strategies including seeking acquisitions/easements, working with local zoning and planning agencies, and providing technical guidance and assistance to landowners.
- When dealing with landowners you need to ask about and understand their conservation/restoration goals and align them with the appropriate partners or third parties.
- GUCP should work with, rather than against landowners and in no way compromise private property rights.

Useful References

1. The North Carolina Resources Commission has developed a Green Growth Tool Box that distributes information on wildlife habitat to county planning offices. It can be accessed at: www.ncwildlife.org/greengrowth.
2. North Carolina state offers a program through its National Resource Leadership Institute that is designed to provide leaders with skills and knowledge in conflict resolution and multi-party negotiation, critical thinking, and collaborative problem solving. Their goal is to “enhance leadership in environmental management and policy development, leadership that will influence workable solutions to complex, often contentious environmental issues.” For more information go to <http://www.ncsu.edu/nrli/leadership>. Other states offer similar programs.

APPENDIX B: INTERAGENCY GRIZZLY BEAR COMMITTEE CASE STUDY

Organization Interagency Grizzly Bear Committee (IGBC)

Date Founded Interagency Grizzly Bear Study Team (IGBST or the Study Team) – 1973
Interagency Grizzly Bear Committee (IGBC or the Committee) – 1983

Mission To help ensure recovery of viable grizzly bear populations and their habitat in the lower 48 states through interagency coordination of policy, planning, management, and research.

Partners

Federal Agencies	State Wildlife Agencies	Other Representation*
US Fish and Wildlife Service	State of Wyoming	Native American Tribes (e.g. Blackfoot)
US Forest Service	State of Montana	Canadian Wildlife Service
US Bureau of Land Management	State of Washington	Parks Canada
US National Park Service	State of Idaho	British Columbia Wildlife Branch
US Geological Survey		Alberta Wildlife Branch

*Regional non-profits and interested citizens are encouraged to attend public meetings and comment on Study Team and Committee findings, proposals, and decisions.

Historical Habitat Protection Issues

In the late 1960s and early 1970s, grizzly bears used dumps in Yellowstone National Park as a food source. At the time, there were both private and National Park Service researchers in Yellowstone studying grizzly bear populations. While researchers agreed the dumps needed to be closed to bears, there was disagreement as to how to do so. A gradual dump closing could allow the bears to regain their natural scavenging skills. If the dumps were closed all at once, the bears would likely meander into campsites and other developed areas in search of human food, increasing the likelihood that they would be killed for human safety reasons. Ultimately, the decision was made to close all the dumps, which led to an increase in bear mortality rates resulting in their placement on the endangered species list in 1975.

In 1973, the National Academy of Sciences held a review of the issue. Their recommendation showed strong foresight: to assign a multi-agency, cross-boundary study team the responsibility of conducting coordinated research on the grizzly bear. The Interagency Grizzly Bear Study Team (the Study Team) would be composed of public lands scientists from all jurisdictions where the grizzly bear might roam within the Yellowstone ecosystem.

In 1982, the U.S. Fish & Wildlife Service, in cooperation with the Interagency Grizzly Bear Study Team, issued a recovery plan. However, scientists found the plan difficult to implement without political support from various government agencies. This prompted the Secretary of the Interior to propose an inter-agency Memorandum of Understanding requesting agencies contribution and cooperation in implementing the recovery plan. Thus, in 1983, the Interagency Grizzly Bear Committee (the Committee) was formed, representing four other grizzly bear ecosystems in addition to the Yellowstone ecosystem.

Since the grizzly bear is an iconic symbol in America, it was relatively easy to gain both political support and funding for the initiative. Over the years, all bear monitoring and research in the Yellowstone grizzly bear ecosystem has been coordinated through the Study Team, and as a result, more is known about the Yellowstone population of the grizzly than any other bear population in the world. This data, combined with the efforts of the Committee, resulted in the Yellowstone grizzly bear population meeting the standards listed in the grizzly bear recovery plan and removing it from the endangered species list.

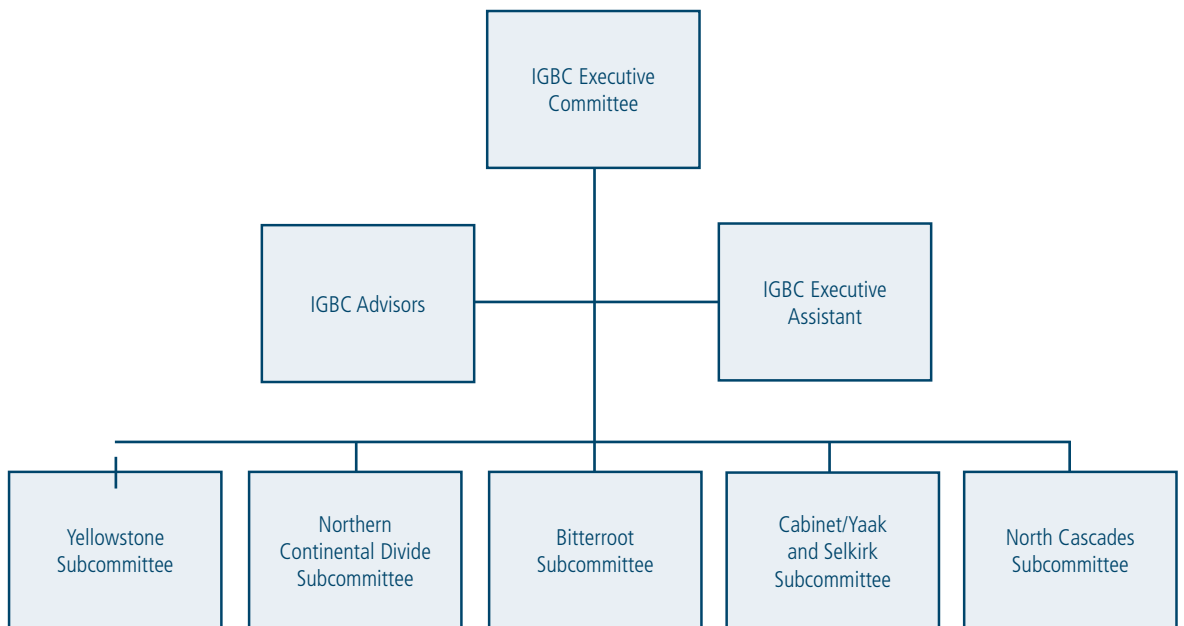
However, there are five ecosystems supporting grizzly bear populations in North America. The Yellowstone ecosystem is just one where the Study Team focused its research over the last three decades. There is still more work to be done, funding to be allocated, and political support to be strengthened or maintained in the remaining four grizzly bear ecosystems, where the grizzly remains on the endangered species list.

Organizational Objectives

There are four major objectives of the Interagency Grizzly Bear Committee:

1. To engage top level decision-makers in a coordinated approach to recover grizzly bears through policy and procedures adopted by each member agency.
2. To coordinate management and research actions of state and federal agencies related to the grizzly bear and to ensure the best utilization of available resources and prevent duplication of effort.
3. To implement the Grizzly Bear Recovery Plan to facilitate recovery of grizzly bears.
4. To implement and oversee the management and research activities related to recovered grizzly bear populations.

Organizational Structure & Administration



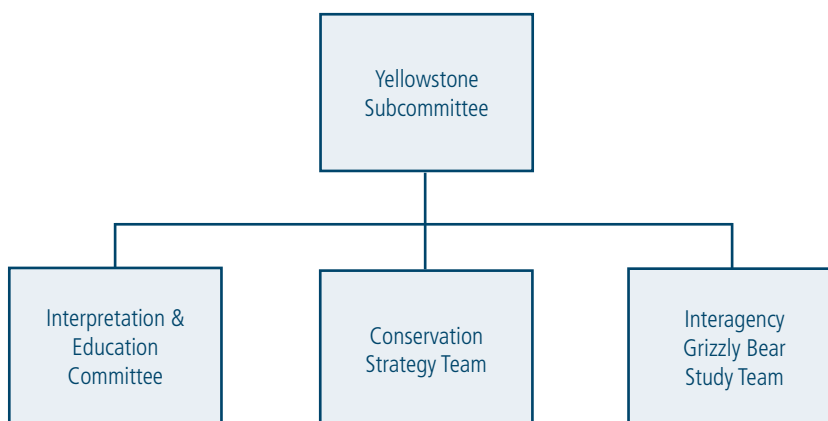
IGBC Executive Committee: Members consist of Regional Foresters, Regional Directors, State Directors, etc. These are people at a high level of influence and decision-making authority. They can influence state, regional, and/or national policy and funding within their respective agencies.

IGBC Advisors: Members provide biological data, strategic direction, and continuity of recovery efforts; lead task forces as necessary; and produce reports for the subcommittees and IGBC. The Advisors consist of the:

1. US Geological Survey Interagency Grizzly Bear Study Team Lead,
2. US Fish & Wildlife Service Grizzly Bear Recovery Coordinator, and
3. US Forest Service Grizzly Bear Habitat Coordinator.

IGBC Executive Assistant: This person coordinates all of the meetings and communications of the Committee. It is a full-time job funded consistently through one IGBC agency.

IGBC Subcommittees: Members consist of Forest Supervisors, Park Superintendents, Regional Supervisors, etc. They influence local and regional policy, and support and implement day-to-day research and coordination efforts in the public lands which they manage. Below is an example of an active subcommittee:



Authorizing Agreements

There are three documents that allow this partnership to work across the many jurisdictions and bureaucracies in which it operates:

1. IGBC Charter

This document established the Interagency Grizzly Bear Committee in 1983. It was signed by the Assistant Secretary of Natural Resources and the Environment at the USDA as well as the Secretary of the Interior.

2. IGBC Memorandum of Understanding

This MOU documents a framework of cooperation between the parties involved in the recovery of the grizzly bear in the lower 48 states through the efforts of the IGBC. It was last signed in 2005 by all of the state and federal agencies involved.

3. IGBC Interagency Agreement

This document was instituted mainly to authorize transfer of funds to the IGBC in order to jointly finance grizzly bear research, monitoring, and management projects approved by IGBC. It was signed in 2007 by all of the state and federal agencies involved.

Partner Communication Methods

Funding

Funding is provided to each agency from their respective state or federal source specifically for the purpose of IGBC activities. Though some funding comes through the relevant agency's base allocations, often activities are funded through less stable project funding or other non-base allocation. This can influence how robust a certain activity is in a particular location.

For example, the Interagency Grizzly Bear Study Team receives annual base funding for monitoring in the Yellowstone ecosystem, and as a result there are decades of consistent scientific data to rely upon in that ecosystem. In contrast, the Northern Continental Divide ecosystem was recently allocated some project funding to study hair DNA in order to calculate grizzly bear populations. The result is some very good, snapshot data. However, because that ecosystem receives inconsistent funding, the data are not robust enough to make recommendations as to whether the grizzly bear has recovered under the Endangered Species Act in that ecosystem.

The IGBC Subcommittees meet regularly, at least twice a year, depending on how active that ecosystem's subcommittee is. The IGBC Executive Committee meets three times a year. Each IGBC Subcommittee representative, as well as each of the IGBC Advisors, presents the Executive Committee with information on their relevant issues.

IGBC also holds a science conference once a year, where all of the scientists working on grizzly bear efforts in the regional ecosystems share information and coordinate research.

In addition to these closed Committee meetings, the IGBC holds public informational or discussion meetings in which the public is invited to attend. Attendees include NGOs and concerned members of the public. IGBC often takes the opinions garnered from these meetings to the Executive Committee meetings.

To complement regular meetings, the IGBC Executive Assistant coordinates regular communication by email, phone, conference call, and newsletter. The website, www.igbconline.org, serves as a detailed information source for both the Committee as well as the public.

Partnership Challenges

The main challenge of this partnership lies in its breadth and depth of partners. There is a lot of information to be shared in order to produce well-informed decisions. Political influences of each Agency are also a factor. As many government agencies are under-funded, it can be difficult to decide how to fund the various initiatives. Agency leadership and research personnel change often, making it difficult to create consistency of information and knowledge in the group.

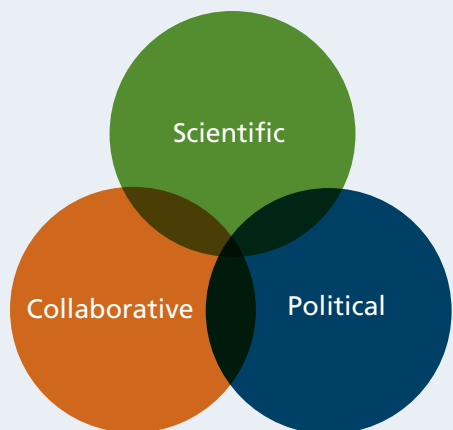


JIM PEACON/PS

Regular meetings and communication as described above can help overcome these. The presence of a neutral base of scientific data to help inform decision-making keeps political bias from unfairly influencing decisions. Leadership positions on the Committee rotate among the agencies so that both the power and resource base are balanced. Both the Study Team leader and the Resource Coordinator Advisors are professional biologists with a strong focus on long-term grizzly bear conservation and decades of experience. They bring historic knowledge, organizational consistency, and a passion for the resource to the organization.

Approaches to Habitat Protection

Recognizing that a complex issue such as grizzly bear conservation, which is spread over a wide geographical area, cannot be solved with a simple approach, the IGBC has used a three-pronged approach to habitat protection.



Scientific: Develop coordinated and robust scientific methodology across ecosystems; conduct research in cooperation with all agencies.

Political: Include agency representatives from the ground level to the top decision-makers; inform public and garner public support.

Collaborative: Provide consistent opportunities for partners to meet and share issues and ideas; create buy-in at all levels.

Key Lessons Learned

1. There needs to be a base of political support at all levels of bureaucracy.
2. Public support for the program helps influence funding and decision-makers.
3. Individual personality, motivation, and level of passion matters.
4. A base of neutral and objective scientific data simplifies decision-making.
5. Commonality and consistency of data, communication, and people/knowledge positively influences partnership sustainability.
6. A regular and predictable communication structure stimulates creative collaboration and creates buy-in.
7. Organizational structure – having inputs at all levels – affects the ability of the partnership to create sustainable, practical change.
8. Rotating leadership and neutral advisors help keep the partnership from having an unbalanced power structure.



JIM PEACOCK/NPS

Useful References

1. The official website for the IGBC provides background on the organization, highlights its accomplishments, and lists initiatives by ecosystem. The site also includes charter and agreement documents, as well as meeting schedules and technical reports. <http://www.igbconline.org/html/about.html>
2. This website provides further information on the Interagency Grizzly Bear Study Team and their collaborative, inter-agency scientific efforts. <http://nrmsc.usgs.gov/research/igbst-home.htm>

APPENDIX C: SOUTH COAST WILDLANDS CASE STUDY

Organization

South Coast Wildlands (SCW)

Date Founded

The original statewide conference was held in November 2000 to discuss habitat connectivity protection needs. South Coast Wildlands was official incorporated in 2001.

Mission

To protect and restore systems of connected wildlands that support native wildlife and the ecosystems upon which they rely.

Partners

Federal Agencies	State Wildlife Agencies	International Non-Governmental Organizations
US National Park Service	State of California Resources Agency	Pronatura
US Forest Service	California State Parks	Conabio
Bureau of Land Management	Non-Profit Organizations: Anza Borrego Foundation and Institute, California State Parks Foundation, Conservation Biology Institute, Environment Now, Mountain Lion Foundation, The Nature Conservancy, Rivers and Mountains Conservancy, San Diego State University, Santa Monica Mountains Conservation, Wetlands Recovery Project, The Wildlands Conservancy, Zoological Society of San Diego	
US Geological Survey		

Organizational Mission & Administration

SCW's mission is to protect and restore systems of connected wildlands that support native wildlife and the ecosystems upon which they rely. To achieve this end, the organization is comprised of a few staff, a board, and a Scientific Advisory Committee. The organization has four full time staff and one hourly employee. Staff positions include: Chief Executive Officer, Conservation Director, GIS Analyst/Programmer and Finance Director. The Board of Directors is comprised of specialists from many disciplines, such as science, planning, policy and law. SCW also has a Scientific Advisory Committee that includes experts from each taxonomic group.

General Habitat Protection Issues

The South Coast Missing Linkages Project is an ecosystem-wide effort working to maintain and restore wildland connections in the South Coast eco-region. This Southern California eco-region, covering approximately 8% of the state, extends roughly 190 miles from Bakersfield, California south to Baja, Mexico. As California's most populated eco-region, it has the unfortunate distinction of being the most threatened hotspot of biodiversity in the USA, with over 400 species of plants and animals considered at risk by government agencies and conservation groups (Hunter, 1999).

The project's goal is to address habitat fragmentation at a landscape level by identifying and prioritizing linkages that conserve essential biological and ecological processes. By gathering biological data for mammals, amphibians, plants, insects and other native species, each linkage is designed to best provide for the combined need of those species. Ultimately, this effort will serve as a catalyst for directing funds and attention toward the protection of ecological connectivity for the South Coast eco-region.

History of Partners

California State Parks, California Wilderness Coalition, The Nature Conservancy, San Diego Zoo and the US Geological Survey sponsored the original missing linkages conference in November 2000. Over 200 land managers and biologists from throughout California participated in the conference (Beier et al. 2006). Riding on the success and publicity of this conference, a meeting was convened by the sponsors and other interested parties to discuss continued work on this topic. It was agreed that an organization was needed to identify and maintain linkages. This group worked to incorporate SCW in 2001, which originally consisted of an Executive Director (Kristeen Penrod), a Board of Directors, and a team of Science Advisors.

From the project's inception, preceding the incorporation of SCW, habitat protection was approached in a collaborative manner. The original workshop was supported by a variety of sponsors, the report proceedings were produced with the logos of all participants, and the decision to create SCW was by consensus of the group. The original conference determined the regional need to identify essential linkages in a manner that all parties could support. SCW was to achieve its mission by coordinating efforts and partners throughout the region.

SCW worked with its partners to design a series of linkages between large natural areas in order to provide corridors and habitat for wildlife. The process of collecting, discussing, and finalizing the regional linkages was an open and collaborative process. As the project progressed over time, so did the list of participants. Some stakeholders were engaged in identifying the original 60 linkages and prioritizing that list down to 15 regionally important areas of focus. Other stakeholders were engaged on the particulars of a specific linkage and worked more closely with SCW on that plan. According to Kristeen Penrod, "there can never be too many partners." The final linkage plans were shared openly with a wide variety of partners and stakeholders for use in their planning, land acquisition, and conservation efforts.

Partnership Challenges

The two main challenges identified for the partnership are limited resources and capacity. The size of the eco-region and the limitation of resources resulted in the immediate need to focus SCW's work. Sixty linkages were originally identified at the statewide conference. However, due to limited resources these 60 linkages were prioritized, and from that 15 Linkage Conservation Plans were developed to form the backbone of a regional conservation strategy.

As a small organization, SCW is challenged to manage multiple priorities at once and move quickly enough to be responsive to each of the 15 linkage's needs. As they complete each linkage report there is a group or organization ready to move forward with implementation. SCW has to balance the desire to participate in this new coalition, assisting with the creation of conceptual area protection plans for land acquisition, and the need to complete the remaining linkage reports. Staff time can be at a premium for SCW. Partner time and resources can also be a limiting factor, preventing some partners from providing resources necessary to conduct analyses.

This limited capacity has resulted in some rare pleas to dispense with time-consuming science and produce the linkage designs more quickly. SCW has stuck with their goal of a science-based decision process despite the appeal of less rigorous and time-consuming methods. This has secured their position as an "honest" broker with all partners and stakeholders, and gives their products credibility with the environmental, scientific, and governmental communities.



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Partner Communication Methods

In 2001, when SCW was established, a steering committee was convened with representatives from each major partner group. The committee convenes monthly conference calls to ensure the South Coast Missing Linkages project is integrated with other efforts in the region; this committee helps trouble shoot potential problems and ensures the project is on track.

Each of the major linkages is assigned to a partner who is responsible for following and reporting on the activities of that linkage. The main partners include: SCW, San Diego State University Field Station Programs, National Park Service, Santa Monica Mountains Conservancy, The Nature Conservancy, California State Parks, US Forest Service, The Wildlands Conservancy, and the Conservation Biology Institute. This keeps the partners engaged in both local linkages and the overall process.

The various workshops, organized by SCW, provide venues for reaching out to a wide variety of constituents and stakeholders in the South Coast Region. These workshops are open to all parties interested in the process of the linkage design. Each workshop and linkage design brings together new stakeholders based on a localized discussion or stage of the linkage design development.

Habitat Protection Methods

SCW approaches its goal of implementing a regional conservation strategy by collaborating with regional ecologists, regulatory agencies, land managers and planners, and other conservation organizations. Collaborating with these partners, they have developed a standardized set of methods for conserving a network of protected wildlands for the region. This method has been described as a scientific rule-based, collaborative approach for creating their linkage design. Three ideas set the stage for this approach: 1) relying solely on expert opinion often overlooks other options, 2) a model provides transparency for decision making, and 3) rule-based procedures allow formal sensitivity analysis which is valuable for conservation planning.

Workshops were held throughout the process, providing a venue for reaching out to a multitude of stakeholders. The intent of the workshops can be divided into three main areas:

“Biological Perspectives Workshops: Agency, academic and professional scientists specializing in a wide variety of disciplines present the results of biological studies in the region and participate in taxonomic workgroups to identify focal species that represent the complexity of ecological interactions that can be sustained by successful linkage design.

Conservation Design: The focal species data generated at the workshops, along with additional research and various GIS analyses, guide field assessments and the development of conservation designs for each linkage.

Conservation Delivery: As each linkage design is completed, working groups are initiated to engage planners, engineers, biologists, federal and state agencies, tribal associations and local non-governmental organizations in implementation activities. This project is dedicated to ensuring that each linkage design is incorporated into all local management and planning activities in the region (SCW website, 2008).”

By all accounts, the SCW Missing Linkages project has been deemed a success. Each linkage design is a tangible outcome of a collaborative process. These maps can be used for education and planning purposes. The Bureau of Land Management, Southern California Association of Governments, California State Wildlife Action Plan, Los Angeles and Ventura counties are some of the agencies and organizations that have incorporated the linkages information into their planning efforts. The provision of these maps allows other organizations to proceed on acquiring land, protecting important areas or mitigating impacts to on wildlife habitat and connectivity.

Key Lessons Learned

This case study provides three key lessons for forming effective partnerships. They are:

1. Collaborative leadership

All of the interviews conducted for this case study relayed a consistent theme that the collaborative nature of this project is the underlying reason for its success. This approach was embodied in the organization's leader at the time, Kristeen Penrod. Kristeen approached this project in an inclusive way, inviting all potential partners to the table to be a part of the discussion and inviting their ownership as well. To this end, Kristeen can be quoted to have said, "there can never be too many partners." This quote connotes openness to working with others to achieve mutual goals. In this case, the leadership of SCW views participation not as a burden or something to be endured, but something to be embraced as a way to best achieve a mutually decided goal.

2. Seeking and maintaining buy-in and ownership from all participants

Beyond stating a desired approach, securing buy-in and ownership from all parties requires a concerted effort to develop, implement, and sustain a collaborative approach. This effort was deemed successful because of repeated opportunities for interested parties to share their opinions and/or expertise. From the project's inception, efforts were made for displaying the collaborative nature of the project, such as printing the conference proceedings with all participant logos. This may seem like a trivial item but it displayed a cohesion that the project was aiming for, drawing others in to the effort.

The workshops held by SCW were participatory in nature, creating an open process that responded to the input and feedback from a wide variety of stakeholders. In addition to acquiring this feedback, SCW was responsive to it. They were willing to work with each stakeholder as needed to accommodate their individual concerns, trying out a variety of assumptions until they were satisfied with the proposed linkage design.

3. Transparent, science based process

SCW committed itself to a scientific approach for its work. This process, while time consuming, resulted in linkage information that was hard to refute. Using a multi-step process, each linkage map was created in a transparent way. The criteria for determining the linkages were made available to those interested and details were discussed and negotiated to accommodate differing needs. The transparency of the process created not only a product but a process that a wide variety of partners and stakeholders could ultimately support.

Next Steps for the Organization

The SCW mission statement discusses their commitment to a vision of a wildlands network for the South Coast Ecoregion and beyond. SCW hopes that in 5 years from now, most of the South Coast network is protected through acquisition or conservation. They hope the rest of California will be where the South Coast Missing Linkages project is now and in 10 years the approach will be spreading throughout the Pacific North-West. SCW is beginning this expansion by changing their name and expanding their geographic scope beyond Southern California; their new name will be Science and Collaboration for Connected Wildlands. They intend to employ the same successful collaborative approach to their future endeavors.

Useful References

Beier, P., K. Penrod, C. Luke, W. Spencer, and C. Cabanero. 2006. "South Coast Missing Linkages: restoring connectivity to wildlands in the largest metropolitan area in the United States". In *Connectivity Conservation*, K. Crooks and M. Sanjayan, eds, 555-586. Boston: Cambridge University Press.

Hunter, R. 1999. *South Coast Regional Report: California Wildlands Project Vision for Wild California*. Davis: California Wilderness Coalition.

South Coast Wildlands website: <http://www.scwildlands.org/>

This site provides general information about SCW, as well as, specific information on their processes and maps and reports of the South Coast Missing Linkages.

APPENDIX D: SAMPLE STRUCTURE FOR A PARTNERSHIP CHARTER

Every formal partnership should have a partnership charter. While the details of the charter may vary depending on the circumstances of the partnership, the following is recommended as an overall structure.

I. **Purpose and Mission** – state the purpose for which the partnership is formed, and describe the major ways in which the partnership will help fulfill its purpose.

II. **Membership** – list out the partnership members (this is the core partners who will be involved in decision making and does include the wider circle of groups and individuals who may engage with the partnership).

III. **Steering Committee** – Define the major parameters for the Steering Committee (or whatever name the partnership gives to the primary decision making body) including its purpose, how often it meets, who attends.

IV. **Working Groups** – Define the major parameters for the Working Groups (groups focused on specific projects or goals) including their formation, what they can and cannot do, how they elect a group chair, and the way in which they report back to the Steering Committee.

V. **Organization and Decision Making** – Describe how the Steering Committee will make decisions, form subcommittees, develop agendas, handle meeting minutes, and determine the chair and vice chair positions.

VI. **Responsibilities** – Describe what is expected from partners regarding things such as attendance at and preparation for meetings.

VII. **Dissemination of Information** – Describe how information will be disseminated outside the partnership.

VIII. **Changing the Charter** – Describe the process for revising the charter.

APPENDIX E: ADDITIONAL REFERENCES

Mattessich, Paul W., Marta Murray-Close and Barbara R. Monsey. 2001. *Collaboration: What Makes It Work*, 2nd Edition. Saint Paul: Fieldstone Alliance.

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