

# Managing Public Lands for Impact and Sustainability

## THE TAMALPAIS LANDS COLLABORATIVE CASE STUDY



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## INTRODUCTION

California, like all states throughout the U.S., is grappling with issues of sustainability—not only of its significant natural resources, but also the sustainability of the agencies responsible for managing its extensive public lands system. 2013 was an uncertain and humbling year for California’s land managers, who endured sequestration, a 16-day federal government shutdown, and the repercussions of the mandate to close 70 state parks two years prior. On the heels of these setbacks, the conservation community is embracing new and creative approaches to land protection and stewardship—including innovative partnerships.

Public land agencies have collaborated for many decades, both informally and formally through inter-agency agreements, to share resources, equipment, staff, and information. Recently, we have seen an emergence of more deliberate partnerships with their own identities and priorities and a commitment to building durable relationships. Interest in partnerships is especially growing where agencies share jurisdictional boundaries. These newly emerging strategic partnerships<sup>1</sup> are going well beyond short-term exchanges and project- or transaction-based collaboration. They are demonstrating visible results, with some founded in long-term, aspiration-based collaboration and collective impact.<sup>2</sup>

### The Partnership Conundrum

As interest in multi-agency partnerships grows, land managers are facing a conundrum. They recognize the power and potential of pooling resources across jurisdictional boundaries towards specific goals, but many are unclear of the best way to approach this level of strategic collaboration and sustain it. With a high partnership failure rate,

concerns about power and equity, and cultural differences between partnering entities, resource managers and agency staff are more carefully investigating examples of effective partnering.

This case study tells the story of a newly formed partnership in Marin County, California called the Tamalpais Lands Collaborative (TLC) that is taking an innovative approach to sustaining the health of Mount Tamalpais. The case study examines the early stages of the partnership among four unique land management agencies—the Golden Gate National Recreation Area (GGNRA), a unit managed by the National Park Service (NPS); California State Parks (State Parks); Marin County Parks;<sup>3</sup> and the Marin Municipal Water District (MMWD)—and one nonprofit organization, the Golden Gate National Parks Conservancy (Parks Conservancy). It also outlines the need for the partnership, the steps, and key issues involved in its formation, including purpose, mission, geographic focus, goals, funding, governance structure, resource allocation, and partner roles.

### Methodology

An independent consultant conducted 27 individual interviews with the staff, executive leadership, and boards of the partner organizations as well as with community leaders and other stakeholders who are invested in the future of the TLC.<sup>4</sup> Secondary research included the review of internal planning documents and external reports such as the April 2014 report by the Parks Forward Commission that outlines recommendations to address the long-term financial, operational, cultural, and demographic challenges facing California State Parks.<sup>5</sup> This case study is also informed by literature and recognized best practices on strategic partnerships and organizational development as well as the consultant’s direct experience with other natural resource-based partnerships around the country.

3 Marin County Parks and Open Space District recently rebranded and now call themselves Marin County Parks with two divisions—Marin County Parks and Landscape and Marin County Open Space District.

4 See page 12 for the list of interviewees.

5 In 2012, the California Legislature passed a bill to form an independent, multidisciplinary panel of experts, citizens, and thought leaders charged with making recommendations for the wholesale reinvention of California State Parks. To read the latest version of the Parks Forward Commission’s report, visit <http://parksforward.com/research-reports>.

1 A strategic partnership is a special type of partnership that exists when there is an intentional, interdependent collaboration between two or more entities designed to achieve specific goals. This type of partnership requires ongoing investment, structures, systems, and skills for ensuring a productive inter-organizational relationship. <http://conservationimpact.com/cms/wp-content/uploads/2013/08/Partner-Relations-Continuum.pdf>

2 Stanford Social Innovation Review defines collective impact as the commitment of a group of entities “from different sectors to a common agenda for solving a specific social problem. Unlike most collaborations, collective impact initiatives involve a centralized infrastructure, a dedicated staff, and a structured process that leads to a common agenda, shared measurement, continuous communication, and mutually reinforcing activities among all participants.” [http://www.ssireview.org/articles/entry/collective\\_impact](http://www.ssireview.org/articles/entry/collective_impact)

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*Jurisdictional boundaries of Mount Tamalpais*

### Land Management of Mount Tamalpais

Mount Tamalpais is an iconic natural landmark in the San Francisco Bay Area and the highest peak in the Marin Coast Range. Mount Tam provides its visitors and community with clean, ample water and fresh air as well as a stunning natural landscape for renewal, solitude, inspiration, and recreation.<sup>6</sup> The mountain and its watershed lands provide water resources to 186,000 Marin County residents.<sup>7</sup>

While Mount Tam is seen by the community as one mountain, the land is actually owned and managed by four adjacent, but separate public agencies. Each agency is responsible for protecting and stewarding the land within its jurisdictional boundaries. The MMWD manages 18,600 acres covering the entire northern flank of the mountain. State Parks owns the second most land holdings with 6,300 acres making up Mount Tamalpais State Park. The mid to lower flanks of the mountain are managed by the NPS on the

west side of Mount Tam and Marin County Parks on the northeast side and along the base of the mountain. Interestingly, Muir Woods National Monument, one of the most visited destinations on Mount Tam, is managed by the NPS but is surrounded entirely by lands owned by State Parks.

While Mount Tam's land ownership resembles a mosaic, its ecosystems and natural processes transcend these artificial property lines. Activities on lands upstream have a direct impact on the quality of downstream habitats. Jurisdictional boundaries are also irrelevant to most visitors who recreate on the mountain. It is common for hikers and other users to cross property lines multiple times during an outing.

### A New Approach

In 2012, conditions on Mount Tam were ripe for an innovative land management partnership to emerge—one that elevated the stewardship needs of the mountain to ensure a thriving ecosystem, meaningful visitor experiences, and an actively involved community for generations to come. It is important to understand the factors that helped catalyze this new partnership.

As adjacent land managers, State Parks and NPS have worked together for many years sharing resources, trail crews, and expertise. In 2003, the two agencies led an effort with adjoining land

<sup>6</sup> Mount Tamalpais is also part of the California Central Coast Biosphere Reserve, one of 411 of the most globally important ecosystems designated by the United Nations Educational, Scientific, and Cultural Organization's (UNESCO) Man and the Biosphere Program.

<sup>7</sup> Marin County residents are unique in that the majority of their water supply is sourced from their own backyard. Most other communities in California rely on water sources that are located hundreds of miles away and must be piped through mountainous landscapes. <http://www.marinwater.org/DocumentCenter/View/916>

managers, MMWD and Marin County Parks, the Parks Conservancy, and members of the public to create a joint vision for future conditions of the Redwood Creek Watershed, one of several watersheds on Mount Tam. This was the first attempt by these agencies to formalize a watershed or ecosystem approach to the management of neighboring lands with multiple land managers.



*The Redwood Creek Watershed encompasses part of the GGNRA, including Muir Woods National Monument, and the southeastern half of Mount Tamalpais State Park*

During this time, MMWD, like its adjacent land managers, was facing challenges such as the increasing spread of invasive non-native plant species, declining forest health, and a growing list of deferred maintenance projects. During a period of rising costs and unpredictable revenue from water utility fees, much needed environmental improvements within the watershed remained underfunded. These remained at the forefront as MMWD discussed forming a new nonprofit friends group to convene a community of stakeholders around the stewardship, volunteer, and philanthropic support of the Mount Tam watershed. In 2010, MMWD launched a public engagement and planning process, which led to the development of a business plan recommending the formation of a new 501(c)(3) called the Friends of Mount Tamalpais Watershed.

In 2012, faced with the potential closure of four of the six state parks in Marin County, the NPS and State Parks forged a strategy

to secure funding through a \$2 entrance fee increase at Muir Woods National Monument. This was intended to help fund State Parks' operations as well as resource protection, deferred maintenance, and visitor experience improvements in the Redwood Creek Watershed. The partners realized that the closure of Mount Tamalpais State Park could be devastating to natural and cultural resources, place a greater burden on adjacent lands, and present a serious threat to the shared vision for the Redwood Creek Watershed. This crisis provided a renewed focus on establishing a collaborative vision among the two land managers and the Parks Conservancy, the longtime nonprofit partner to the GGNRA. A new partnership was established: the Redwood Creek Watershed Collaborative.

After considerable achievements by the new Redwood Creek Watershed Collaborative and escalating concerns about the feasibility of starting a nonprofit friends group for MMWD, a new possibility was considered. What if the Redwood Creek Watershed Collaborative was expanded to include MMWD, its neighbor to the north? Through meetings among the leadership of NPS, the Parks Conservancy, and MMWD, the group concluded that this was a viable alternative to forming a new nonprofit organization as there was already existing capacity and a 30-year track record of success in the Parks Conservancy. Rather than attempt to build a new nonprofit from the ground up, the group agreed that it would be more advantageous to leverage the infrastructure already in place. State Parks also expressed support for expanding the Redwood Creek Watershed Collaborative to include MMWD.

The partnership concept was shared with several local conservation nonprofits and community leaders with a longtime investment in the stewardship of Mount Tam, to discuss concerns and vet ideas for a possible path forward. Recognizing that their neighbors to the northeast also have a stake in Mount Tam, the emerging partners then invited Marin County Parks to consider joining the collaboration.

In June 2013, the leaders from all five organizations shared their vision for collaboration at a MMWD public workshop. This workshop was an opportunity for the public to consider and weigh alternatives for supporting MMWD—business as usual, a new nonprofit friends group as described in the proposed Friends of Mount Tamalpais Watershed Business Plan, or participation in a larger landscape-level collaborative. Approximately 25 stakeholders, including interested community members, nonprofit volunteers, and staff, shared their opinions. The TLC was the overwhelmingly preferred solution. This public meeting was one of the critical tipping points that led the five organizations to eventually formalize their relationship as the TLC.



### The Six steps of Partnership Formation

Research demonstrates that the most productive partnerships are intentionally and systematically constructed. While there is no one-size-fits-all partnership model given variations by group, geography, and other factors, the TLC’s development can be used to demonstrate the importance of taking a deliberate, step-by-step approach to partnership formation. This case study describes the TLC’s formation process, highlights some of the key ingredients leading to its success, illustrates the critical steps undertaken, and identifies questions to consider when contemplating a new partnership.

The TLC’s partnership formation process had six distinct steps.<sup>8</sup>

- 1 Define the Need for the Partnership
- 2 Assess Partnership Readiness
- 3 Create a Common Vision
- 4 Engage Stakeholders
- 5 Agree to Goals
- 6 Formalize Relationship and Establish Systems

Let us take a closer look at how the TLC partners navigated these six steps during their path to partnership formation.

#### STEP 1 Define the Need for the Partnership

Within the past decade, Mount Tam’s land management agencies have become increasingly aware that they share numerous complex and costly challenges as well as many untapped opportunities for enhancing their approach to land management—including coordinating stewardship and education programs, managing biological resources across jurisdictional boundaries, and improving signage and trail corridors mountain-wide. As the partners assessed the need for partnership, it became evident that central to this need was improving and sustaining the health of the resource—the mountain.

To the occasional visitor of Mount Tam, the mountain appears to be flourishing. However, while Mount Tam is still revered for its incredible beauty and inspiration, many of the region’s resources are stressed. Forest disease, ongoing human impacts, aging infrastructure, and climate change are presenting increased and more complex, widespread challenges. In recent years, Mount Tam has experienced longer and more extreme fire seasons resulting in

closures that impact both public access and operations work such as road and trail maintenance. Sudden oak death has had devastating effects throughout the region and has led to a secondary forest disease further threatening the oak population on Mount Tam.

In 2013, California suffered its worst drought in recorded history. Increased variability in weather patterns and more pronounced drought threatened the water supply, making it more difficult to predict and manage. Resource experts agree that Mount Tam may be facing a slow decline.

The land management agencies also realized that the long-term sustainability of Mount Tam could not be achieved by the agencies tackling resource challenges individually. The needs of the resource required more capacity—more funding for surveying, planning, restoration, and maintenance, increased volunteer support, and greater levels of community education and awareness of the importance of caring for Mount Tam for future generations.

### BOTTOM LINE ▼

Mount Tamalpais exemplifies how today’s public agencies face unprecedented resource management challenges—most of which cannot be solved in isolation. With shrinking budgets, increased pressures on public lands, and the public’s demand for greater government accountability, traditional approaches to public lands management are not always sufficient. More complex challenges require more capacity, innovation, and new ways of doing business.

#### QUESTIONS TO CONSIDER:

- 1) What is the problem we are trying to address?
- 2) How does each partner define this problem differently?
- 3) What are the shared challenges and opportunities facing potential partners?
- 4) What additional information and analysis is needed to address these challenges and opportunities?
- 5) How adequate is each partner’s existing capacity to solve the problem?
- 6) What other competencies, funding, systems, and human resources are needed?

<sup>8</sup> These six steps are supported by organizational development literature as well as analyses of other conservation-based partnerships.

## STEP 2 Assess Partnership Readiness

Given the complexity of having five partners—four of which are government agencies with varying decision-making processes, capacity, budget cycles, and policies—the TLC was able to formalize its partnership relatively quickly. Five key factors made the situation ripe for the partnership to form:

**1. GEOGRAPHIC AND MISSION OVERLAP:** The protection and stewardship of portions of Mount Tam were within each organization’s mission and purview. In addition, the lands were adjacent to each other, making cooperative management a possibility.



**2. NECESSITY FOR THE RESOURCE:** There was a geographic region with significant resource and public values—Mount Tam—that would clearly benefit from the support of the partnership. No one entity could care for the mountain alone. It required the collective efforts of all five partners.

**3. PAST SUCCESS:** There was a long history of successful collaboration among the partners, including over three decades of close partnering between NPS and the Parks Conservancy and the three-year Redwood Creek Watershed Collaborative, which included NPS, State Parks, and the Parks Conservancy. MMWD and Marin County Parks

partnered on the development of the Mount Tamalpais Vegetation Management Plan—completed in 1995—and continued related collaboration thereafter. There were multiple examples of joint work between the four government agencies on specific projects including a variety of natural resources management, infrastructure, wildfire risk management, recreation management, and law enforcement issues. In addition, each agency had its own strong record of conservation achievement.

**4. LEADERSHIP VISION:** The executive leadership of each organization was ready, willing, and enthusiastic to partner for the benefit of Mount Tam.

**5. PUBLIC SUPPORT:** Key stakeholders who have been engaged in the protection of Mount Tam for decades were supportive and excited about the partnership.

## BOTTOM LINE ▼

When organizations are contemplating a new partnership, it is important to evaluate readiness, both in terms of how ripe the situation is (external) and how ready the partners are (internal). Take stock of the external landscape and understand the issues that could potentially be influential. Inventory the assets that your own organization can contribute to the partnership first and then understand the strengths of other organizations around you. Ensure adequate time for the courtship to occur.

## QUESTIONS TO CONSIDER:

- 1) What factors—both internal and external—are present that make our partnership ripe to form?
- 2) What factors are present that make our partnership challenging to form?
- 3) What unique strengths does each partner bring?
- 4) Who else around us has assets that could add value?

### STEP 3 Create a Common Vision

Two of the earliest challenges for the group were reaching a common vision for the partnership and determining the scope and size of the partnership. The group had to negotiate significant questions such as “what is the geographical focus of the partnership?” and “what partners are needed to form a sustainable and effective collaborative?” During a series of focused Working Group<sup>9</sup> staff discussions and an executive management retreat, the partners eventually reached agreement that Mount Tamalpais needed to be the centerpiece of the collaborative, and with that they defined a 46,000-acre area of focus.



*The 46,000-acre area of focus for the Tamalpais Lands Collaborative*

They also agreed that while there are other nearby lands and stakeholders that could both benefit from and contribute to the TLC, too many partners at the outset would hamper the group’s ability to reach common goals and efficiently govern itself. A strategic partnership among five different entities was already a complex undertaking. They settled on the four agencies that manage land encompassing the mountain’s upper region, plus the nonprofit Parks Conservancy.

The partners had quickly embraced the logic of approaching the mountain as a uniform whole. They were fully committed to proactively and effectively sharing resources and increasing efficiencies. They also realized the importance of catalyzing a bigger and more diverse community around a compelling vision for Mount

Tam. One of the missed opportunities of the more traditional agency-centric approach to managing Mount Tam was not being able to foster a collective brand for the mountain as whole. By coming together to form the TLC, the five partners positioned themselves to inspire a community vision for the mountain, tell a much bigger collective story, and share in the role of messaging for Mount Tam.

A key part of the TLC’s purpose was an intentional shift from transaction-based collaboration to a model of long-term, aspiration-based collaboration and collective impact. Having concluded that the current era of land management challenges required new ways of doing business, the partners committed to deeper levels of involvement and developed a joint vision for the mountain, shared goals and strategies, and shared implementation and monitoring of projects and programs. This was a significant change in their relationship and dramatically increased the potential for interdependence. With the development of a clear vision, purpose, and goals, the TLC set the stage for a new, unique identity to emerge. Striking a balance between individual agency identities and this new partnership identity will be an ongoing dance.

### BOTTOM LINE ▼

Large, complex problems require a greater vision. Partners must agree upon the uniting purpose of the partnership and reach a common understanding and language for their collaboration. Sometimes, engaging an outside facilitator is beneficial to this process. It is only when the parties have a mutually agreed upon vision that they can begin to effectively engage and seek input from stakeholders.

### QUESTIONS TO CONSIDER:

- 1) What is the ultimate difference we need to make together?
- 2) By joining forces, what is the new value we hope to create?
- 3) Do we have the right partners involved in order to achieve that difference? Who else are we missing?

<sup>9</sup> See Step 6 for more information about the Working Group and Executive Team.

## STEP 4 Engage Stakeholders

The five organizations recognized that in order to restore Mount Tam to a thriving, sustainable landscape, they needed full community support. They also agreed early on that their efforts needed to be clearly understood by the community. They contemplated how they could step outside their respective jurisdictional boundaries to help translate the mountain to the broader public and in doing so, make it more accessible, relevant, and significant.

In order to be more relevant to the community, the group agreed to embrace an inclusive, constituent-centered approach. They also decided to engage key stakeholders and interested members of the public early in the process—well before officially agreeing to partnership terms—to ensure that those constituents were in support of the partnership’s overarching purpose and vision.

Staff from several of the agencies conducted proactive outreach efforts, meeting stakeholders in common spaces—public gatherings, group hikes, and a movie theater—and attending the meetings of other nonprofit organizations. It was not just about hosting their own meetings but intentionally seeking out and joining others’ meetings. Agency staff met the stakeholders “where they were” and actively listened to their ideas to understand their concerns and hopes for Mount Tam. This required an ongoing investment over many months and remains a priority for the TLC as the partners embark upon developing a five-year strategy. The five-year strategy will expand the engagement efforts to a much broader constituency, an important step to building relevancy and support.

In early 2013, Gary Yost, a local film producer and director, approached MMWD and the Parks Conservancy with a unique opportunity. The local Throckmorton Theater donated time to screen his award-winning documentary “The Invisible Peak” in February. He produced the project to build interest in restoring the West Peak of Mount Tamalpais, a long-abandoned Cold War military radar station that sits on top of the mountain. He invited MMWD, the Parks Conservancy, and the other three land management agencies to be a part of the event. The partners helped promote the event and produced a short video called “One Mountain: Promise of Partnerships” about the power of working in collaboration. It documented two of the recent achievements of the Redwood Creek Watershed Collaborative—a complex project along the Bootjack Trail on Mount Tam and the restoration of the lower Redwood Creek floodplain at Muir Beach. Gary and the partners agreed to kick off the event with this 7-minute video before screening “The Invisible Peak.”

To everyone’s surprise, the event sold out. The agencies were able to integrate their work and partnership message with a community-driven event. Agency staff succeeded in deepening their relationships with the public in a meaningful and enthusiastic environment. The event at the Throckmorton Theater also helped to deepen the public’s connection to the mountain and bolster support for the agencies’ collaboration.

## BOTTOM LINE ▼

Part of the TLC’s vision is to bring more, and more diverse, members of the community together around the mountain. In order to reach broader constituencies, public agencies are paying closer attention to how they deliberately create relationships. Agencies are benefitting from creative and community-driven engagement strategies that go far beyond the more traditional public processes required by the National Environmental Policy Act and California Environmental Quality Act. Agencies are also learning the importance of engaging the public early on in the partnership formation process to ensure that the overarching vision is relevant to the needs and hopes of the community.

## QUESTIONS TO CONSIDER:

- 1) Who are the people we serve and who is necessary to the success of our vision?
- 2) Who else in the community can we align ourselves with in order to engage the public in meaningful ways?
- 3) How can we break through the perceived barriers of badges and uniforms to connect authentically and emotionally with our constituents?



## STEP 5 Agree to Goals

The five partners spent the time necessary to clearly define the overarching goals they planned to accomplish together. They developed three primary themes for their work. Based upon the interviews conducted with TLC partner staff, the author paraphrases these three themes as follows:

- ▶ To protect and restore Mount Tam and make it resilient for the future by supporting priority projects for conservation and restoration
- ▶ To improve education and interpretation opportunities for the visiting public and nearby communities in order to increase appreciation of Mount Tam and develop the next generation of stewards
- ▶ To increase volunteer capacity for stewarding Mount Tam and create a new vehicle for philanthropic support<sup>10</sup>

Agreeing to these goals was also an important opportunity for the group to clarify what they were not going to do. They wanted to stay focused on high impact, proactive, priority projects and programs that would have the greatest support from the community and would be beneficial to the mountain's ecosystem. The process also helped reinforce what the group would hold itself accountable for in its work together.

## BOTTOM LINE ▼

Planning is critical to strategic partnerships. Agreeing upon goals set the stage for the eventual development of a more detailed five-year strategic plan that will define the work to be accomplished by the partnership.

### QUESTIONS TO CONSIDER:

- 1) To successfully achieve our vision, what are the few things (imperatives) we must accomplish at the exclusion of everything else?
- 2) For each priority imperative, what is the partnership-wide outcome we want to see in three to five years?

<sup>10</sup> From these three themes, the partners agreed to nine overarching goals, which are identified in the memorandum of understanding. To read the TLC's nine goals, visit <http://www.parksconservancy.org/assets/park-improvements/pdfs/tlc-mou.pdf>.

## STEP 6 Formalize Relationship and Establish Systems

In March 2014, the five organizations formalized the terms of their relationship in a memorandum of understanding (MOU).<sup>11</sup> The MOU lays the groundwork for the partnership's capacity. Just like organizations, partnerships need ample capacity in order to implement their missions. A partnership's capacity encompasses much more than funding; it includes its systems, structures, staffing, competencies, practices, and culture.



*The five partners stand together following the signing of the MOU on March 21, 2014. Pictured from left to right are Danita Rodriguez, Superintendent, California State Parks Marin / Diablo Vista Districts; Kevin Wright, External Affairs Coordinator, Marin County Parks; Armando Quintero, President, Marin Municipal Water District Board of Directors; Greg Moore, President & CEO, Golden Gate National Parks Conservancy; and Frank Dean, General Superintendent, Golden Gate National Recreation Area*

The MOU sets forth the agreed upon overarching goals and vision for the TLC, its partnership structure and governance, and high level roles and responsibilities. Given the intent to implement joint goals and on-the-ground projects and programs with the Parks Conservancy as the fundraising arm, the partners knew that it was important to establish a deliberate structure with a leadership level (Executive Team) distinct from an operations level (Working Group).<sup>12</sup> In addition, given the complexity of having five diverse parties in the partnership, they agreed to establish a centralized backbone organization for the operations team.<sup>13</sup>

<sup>11</sup> The GGNRA, State Parks, MMWD, Marin County Parks, and the Parks Conservancy became official partners and codified their formation as the TLC on March 21, 2014. It took the five partners approximately six months to develop and finalize a memorandum of understanding, which required agreement to a common vision, governance structure, and roles and responsibilities as well as several rounds of legal review and board approval by MMWD and Marin County Parks.

<sup>12</sup> It is important to note that the staff assignments to the Working Group were deliberate. The Working Group consists of staff with the experience, leadership skills, authority, and clout to make many of the day-to-day decisions necessary for progress. Most of the Working Group members also have "collaboration with external partners" included in their job descriptions, and many have worked together on prior collaborative projects.

<sup>13</sup> Stanford Social Innovation Review (SSIR) is credited with first presenting the concept of collective versus isolated impact. Many strategic partnerships are basing their structure, including the backbone organization, on the five conditions of collective success identified in the SSIR article published in 2011. [http://www.ssireview.org/articles/entry/collective\\_impact](http://www.ssireview.org/articles/entry/collective_impact)



## TLC GOVERNANCE STRUCTURE

### LEADERSHIP LEVEL / EXECUTIVE TEAM *(Strategic / Meets quarterly)*

- Set the vision
- Approve goals, projects, and programs for Mount Tam
- Rally supporters towards the vision
- Ensure ample capacity
- Remove obstacles
- Hold team accountable to agreements, partnership principles, and success factors



### OPERATIONAL LEVEL / WORKING GROUP *(Tactical / Meets monthly)*

- Implement the vision
- Recommend goals, projects, and programs for Mount Tam
- Rally supporters towards the vision
- Ensure updates, minutes, and alignment with leadership
- Raise concerns to team / leadership
- Participate in subgroup(s)



### OPERATIONS BACKBONE *(Parks Conservancy)*

- Create meeting agendas
- Facilitate meetings; gather consensus
- Vet ideas and clarify miscommunication
- Track and undertake immediate and long-range tasks
- Support inter-agency communication
- Document communication and decisions
- Hold team accountable to tasks and agreements
- Maintain central hub for shared documents

The Parks Conservancy had staff, experience, and the necessary competencies to take on the operations backbone role. The TLC also added other layers to its governance structure, including a volunteer steering committee to vet fundraising feasibility of projects and specialized subgroups for making recommendations to the Working Group.

Creating an authentic culture of partnership within one's own organization can be difficult and remains elusive for many organizations and agencies—even those who are actively utilizing partnerships to help achieve their mission. Creating an intentional culture becomes even more challenging outside the confines of one's own organizational chart and traditional hierarchy. From its nascent stage, the TLC partners were deliberate about fostering a culture of collaboration. The leadership of the five partners developed and agreed to a written set of partnership principles and success factors,<sup>14</sup> setting clear intention from the beginning not just for **what** they planned to accomplish together (goals) but also **how** they planned to work together (values).

Building peer-to-peer relationships and trust, focusing on the group's identity and how each organization can contribute to it, and sharing in accomplishments and success can only happen when the leadership of each partner organization explicitly wants it to happen. The TLC's jointly developed partnership principles and success factors are one yardstick for how well the partnership is functioning. It will be the leadership team's ongoing responsibility to ensure that all of the partners remain accountable to these metrics. Oftentimes in multi-organizational partnerships, principles and values for collaboration are assumed and ambiguous. Over time, this tends to translate to unspoken conflict, concerns about equity, tension, or an unwillingness to work together.

## BOTTOM LINE ▼

Resist the temptation to collaborate on specific projects before formalizing the nuts and bolts of the relationship. All partnerships must determine the best structure to achieve their goals given the assets of each partner. It is critical that this structural foundation is: 1) deliberately established and agreed to up front, and 2) based upon the goals of the partnership.

<sup>14</sup> The TLC's partnership principles and success factors are based upon the partnership legacy of Brian O'Neill. O'Neill was the former Superintendent of the Golden Gate National Recreation Area and led the park to earn a national reputation as being a model partnership park with a strong value on community partnerships. Today, GGNRA has 300 federal employees and another 1,500 individuals who work in the park and are employed by park partners. Over 80% of GGNRA's services are delivered by partner organizations, illustrating the value the park places on partnering to achieve its mission. <http://www.nps.gov/partnerships/oneill.htm>.

Also essential is the need for both strategic leadership and tactical operations staffing. Similar to individual organizations, strategic partnerships require distinct leadership and operations levels in order to accomplish their goals. The TLC's operations backbone organization model might not be necessary or relevant for other partnerships of this scope and scale; however, many partnerships have failed because they have not had ample staffing to fulfill the roles of project management, data management, and facilitation.<sup>15</sup> An agreed-upon partnership culture is another important capacity consideration. The earlier in a relationship that collaboration values are discussed and agreed to, the more effective and positive the relationship will be.

## QUESTIONS TO CONSIDER:

- 1) What are the explicit terms of our relationship, and how do we formalize those terms?
- 2) To successfully achieve our goals, what is the best partnership model?
- 3) What kind of capacity do we need in order to work productively towards to our goals? What strengths can we build on? What gaps must we address?
- 4) Who makes up our leadership team, and who is responsible for the day-to-day work of the partnership?
- 5) How do we want to work together? What values and principles do we want to hold ourselves accountable to?
- 6) What communications channels and frequency are needed?
- 7) How do we want to navigate conflict and disagreement?

## Challenges to Partnership Formation

While the situation was ideal for these five organizations to join forces, the partnership path was not absent of obstacles. The case study interviewees emphasized two primary challenges that they had to overcome during the formation process: 1) the cultural differences of the five partners, and 2) perceptions of needed equity.

The group was endeavoring to marry an unusual constellation of entities—a small local utility run by a publicly-elected board (MMWD), a state agency in crisis embarking on reinvention (State Parks), a county district undertaking substantial growth

<sup>15</sup> [http://www.ssireview.org/articles/entry/collective\\_impact](http://www.ssireview.org/articles/entry/collective_impact)

(Marin County Parks), a large federal agency (NPS), and an internationally recognized nonprofit (Parks Conservancy). The inner workings and cultures of these entities were dramatically disparate.

When asked what approaches and skills helped the group overcome the challenges posed by their cultural differences, emotional intelligence was the most common response. The individuals involved in the partnership were adept at making time to hear and understand all concerns, “checking egos at the door,” having the motivation to make it work, balancing the agency mission with the bigger vision of the group, and employing relationship skills and a genuine spirit of collaboration. During the formation process, there were times when one organization would leap ahead of the others, and it was necessary to notice how this impacted the other partners and have candid conversations to raise awareness of and address these differences. The fact that some of the staff had previously worked in other partner agencies helped support the group’s common understanding. Many of the partners agreed that intentionally committing to understanding their unique cultures was just the beginning. Some suggested even more explicit inventorying of cultural differences moving forward. Success goes well beyond tolerating each other’s differences. The individuals involved also have to be willing to be flexible and nimble, empathize, and adapt. This will be key to the TLC’s ongoing productivity.

The perceived need for equity was the second most frequently cited challenge to the partnership formation. Equity concerns arose during project prioritization and the allocation of funding for projects. Some partners wanted to ensure that their lands would receive equal benefit from projects. Other partners suggested that funding, once secured, should be distributed in a manner commensurate with the amount of land held by each agency. During one of its early meetings, the group came to recognize that holding onto a need for equity was holding them back and was not in the best interest of the mountain or the public. The partners agreed that a need for equal benefits and “pulling equal weight” was a more traditional approach to partnering that was limiting and counterproductive to the bigger vision they were trying to create. They instead chose to embrace “the sum is greater than its parts” and “a rising tide lifts all boats” approaches to partnership. Equal exchange was more relevant for past transaction-based collaboration. The shift to aspiration-based collaboration required a new way of thinking.

### The Three i’s in Sustainability

In addition to having to overcome obstacles to partnership formation, partners must figure out how to sustain their relationship for the long haul, particularly as people and circumstances change. The TLC partner staff offered their ideas for how they planned

to sustain this new collaborative. Their advice fit into three overarching categories: integration, impact, and inspiration.



- 1) **Integration:** The partners must consider ways to institutionalize the partnership throughout the partner organizations so that the vision is understood and committed to by staff at varying levels. A culture of partnership rather than a culture of personality is key. Formalized agreements like the memorandum of understanding are important but they are only a start. The partners need clear goals and systems for documenting and tracking progress towards these goals. In addition, the work of the TLC needs to become part and parcel of each organization’s priorities by being incorporated into each organization’s strategic plan. A succession plan for the partnership’s Executive Team and Working Group members will also need to be developed with clearly documented roles, responsibilities, and standard operating procedures. The group also needs to plan for staff turnover, partner departure, and even new partners potentially joining the collaborative.
- 2) **Impact:** The partners must continually demonstrate the value and impact of the partnership. They must establish a track record of collective success whereby projects would not be possible without the collective effort of the partners. They must communicate their success within their respective organizations and to the broader public. The partners must generate opportunities for public recognition and celebration.
- 3) **Inspiration:** Not only must the partners stay inspired by the vision, but they also must capture the imagination of diverse constituents who are equally committed to the vision for Mount Tam. They must continue to harness the support of the community through their ideas, volunteerism, stewardship, and philanthropy. The ultimate test of the TLC will be whether a community-wide vision for the mountain will inspire more and more diverse members of the public to increase their involvement and support of Mount Tam.



## CONCLUSION

**T**he TLC case study illustrates the five organizations' path and challenges to partnership formation and the six distinct steps they took during that process. The case study also presents questions for agencies and organizations to consider if they are contemplating a new partnership. While partnership models and scales will vary, these six steps can be universally applied to any start-up strategic partnership. Taking the time to undertake a deliberate process up front will save partners considerable time and energy down the road and better position the partnership for success and sustainability.

Just like in human relationships, forming a partnership is just the beginning. Committing to maintaining and sustaining a partnership for the long haul requires an ongoing investment. What the TLC and other partnerships around the country are demonstrating is the critical nature of human relationships to achieving collaborative conservation impact. Skills and competencies in relationship building, empathy, communication, and conflict management have become just as integral to effective land management as ecological expertise.

There is expanding consciousness among the conservation community at large—from private foundations and public agencies to nonprofits and individual outdoor enthusiasts—that the complex challenges of our era demand alternative paths for building capacity and achieving sustainable impact. As a result of this deepening awareness, many of the individuals who participated in this study expect to see a continued shift—especially for contiguous lands—towards broader landscape level planning and goal setting and a greater willingness to share capacity. To tackle these larger visions, resource managers are observing the scope and scale of strategic partnerships expanding. To help prepare us for these changes and for partnerships to become genuine vehicles for capacity building and conservation impact, partnerships must become integral to public agencies and their nonprofit partners. Organizations that successfully integrate partnerships into their operating mindset, long-range plans, and organizational culture will be better prepared for the challenges ahead.

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Funded by the S.D. Bechtel, Jr. Foundation

*The author would like to thank the following individuals who contributed to this case study through their participation in interviews.*

**Aaron Roth**, Golden Gate National Recreation Area

**Arlin Weinberger**, Friends of Mt Tam

**Armando Quintero**, Marin Municipal Water District

**Brian Aviles**, Golden Gate National Recreation Area

**Colin Lind**, Golden Gate National Parks Conservancy

**Danita Rodriguez**, California State Parks

**Doug McConnell**, Media Consultant

**Ernest Chung**, California State Parks

**Frank Dean**, Golden Gate National Recreation Area

**Gary Knoblock**, S. D. Bechtel, Jr. Foundation

**Gary Yost**, Filmmaker, "The Invisible Peak"

**Greg Moore**, Golden Gate National Parks Conservancy

**Janet Klein**, Marin Municipal Water District

**Jill Kauffman Johnson**, Consultant/Volunteer for  
Marin Municipal Water District

**Jim Gannon**, Friends of Mt Tam

**Kevin Wright**, Marin County Parks

**Krishna Kumar**, Marin Municipal Water District

**Larry Minikes**, Marin Conservation League

**Linda Dahl**, Marin County Parks

**Marilee Eckert**, Conservation Corps North Bay

**Matt Leffert**, Golden Gate National Parks Conservancy

**Michelle O'Herron**, Golden Gate National Parks Conservancy

**Mike Swezy**, Marin Municipal Water District

**Nona Dennis**, Marin Conservation League

**Sharon Farrell**, Golden Gate National Parks Conservancy

**Victor Bjelajac**, California State Parks

**William (Bill) Lutton**, California State Parks