

Planning for Growth and Open Space Conservation

This webinar series is sponsored by:
USDA Forest Service
State and Private Forestry - Cooperative Forestry

Organized by
Rick Pringle, Susan Stein, Sara Comas, Susan Guynn (Clemson University)
and the
Forest Service National Open Space Conservation Group



This webinar is being recorded

**Audio is
Streamed Through
the Computer**

Learn About the Series

Listen to past webinars!



Listen to our past webinars:

- ▶ Session #9: Private land conservation programs from the Farm Bill: Natural Resources Conservation Service, Farm Service Agency, and US Forest Service.
- ▶ Session #8: Landscape Conservation Initiatives: US Fish and Wildlife Service, Bureau of Land Management, Department of Defense, Natural Resources Conservation Service
- ▶ Session #7: Science to inform Open Space Conservation: Land use changes, forest fragmentation, and the Wildland-Urban Interface
- ▶ Session #6: Facilitating Large Landscape Conservation Efforts: Working effectively across boundaries in the Northeast and Crown of the Continent
- ▶ Session #5: Local and Regional Land Trusts: Essential partners and the tools they provide
- ▶ Session #4: The Forest Service Toolbox: Conservation easement and land acquisition programs
- ▶ Session #3: Green Infrastructure Planning: Connecting partners and greenspaces
- ▶ Session #2: YES YOU CAN! Participating in Growth Planning Beyond the Green Line
- ▶ Session #1: National Forest Management in the Face of Housing Growth

Learn about future topics!



Future Topics:

Please [register](#) in advance if you would like to attend these presentations.

- ▶ Session #11: An All Lands Approach to Ecosystem Services for Water

Submit feedback about the series!



Please submit your feedback [here](#)

Learn About the Series

Click on the session titles for more info on recordings, slide presentations, and featured resources



[Listen to our past webinars:](#)

▾ [Session #13: City and County Open Space Programs](#)

This program presents growth and open space conservation planning for cities and counties. Speakers will present the Trust for Public Land's Conservation Almanac and LandVote resources that are available online for researching conservation activities, and public funding for land conservation. We will also learn about open space conservation planning processes, ordinances, funding mechanisms, and partnerships employed in Missoula, Montana, and Baltimore County, Maryland.

- [Mary Bruce Alford Trust for Public Land](#)
- [Jackie Corday City of Missoula, Montana](#)
- [Don Outen Baltimore County, Maryland](#)

[Link to video presentation](#)

[Link to PDF Presentation](#)

[Link to resources from this webinar](#)

▸ [Session #12: Greening Grey Infrastructure: Federal Highway Administration's Eco-Logical Approach and Case Studies from National Forests in Ohio and Washington](#)

▸ [Session #11: An All Lands Approach to Ecosystem Services for Water](#)

▸ [Session #10: Tools for Conservation Planning](#)

Webinar Resources and Tools



USDA United States Department of Agriculture
Forest Service

Open Space Conservation

Forest Service Home | About the Forest Service

Browse by Subject You are here: [Home](#) | Resources

- ▶ National Strategy
- ▶ Loss of Open Space
- ▶ Success Stories
- ▶ What the Forest Service can do!
- ▶ **Resources & Tools**
- ▶ Cooperating Across Boundaries
- ▶ Forests On The Edge
- ▶ Publications

Resources and Tools

The resources and tools shared below correspond with topics from our [Planning for Growth and Open Space Conservation webinar series](#).

Want to add tools to this list? Contact [Rick Pringle](#) with a link

Legal Authorities for Forest Service Engagement in Open Space

- ▶ [Forest Service Handbook 1509 Grants and Agreements](#)
- ▶ [Partnership Guide](#)
- ▶ [Partnership Resource Center](#)
- ▶ [Principles of Ethical Conduct for Government Officers and Employees](#)

Find relevant resources for each webinar session here!
If you have relevant resources to share please send them to us!

Session #16: Strategic Conservation Planning and Partnerships



Ole Amundsen
Conservation Fund



Kristin Sherwood
The Nature Conservancy

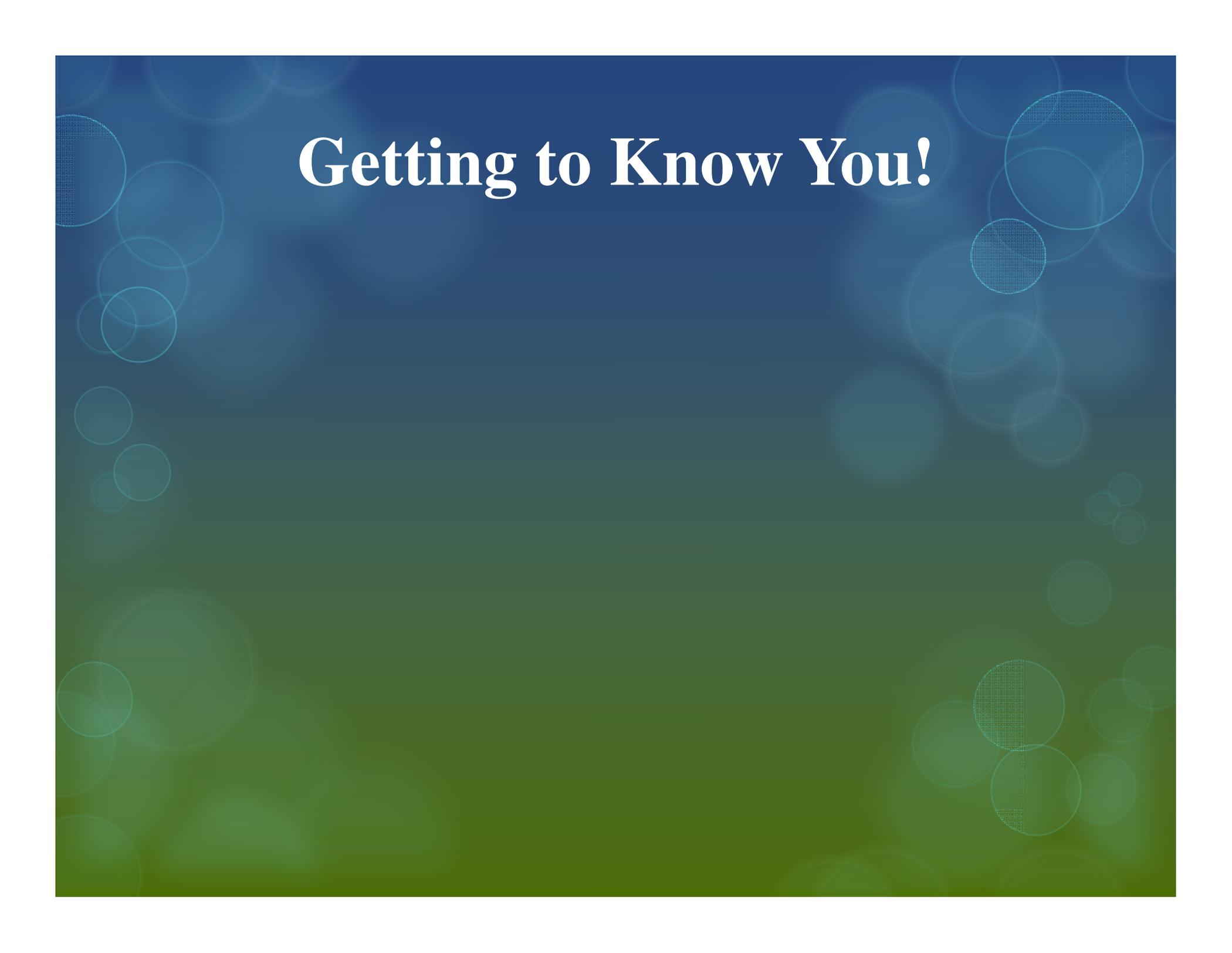


Melinda Pruett-Jones
Chicago Wilderness

Logistics – Q&A

- **Continuing Education Credits**
 - Attend entire presentation
- **Questions for speakers – chat pod**
- **Technical difficulties – chat pod or email Susan Guynn: SGUYNN@clemson.edu**

Getting to Know You!

The background features a vertical color gradient from dark blue at the top to a vibrant green at the bottom. Scattered across this gradient are numerous overlapping circles of varying sizes and opacities. Some circles are solid, while others are semi-transparent, creating a layered, bokeh-like effect. The overall aesthetic is clean and modern.



Ole Amundsen
The Conservation Fund

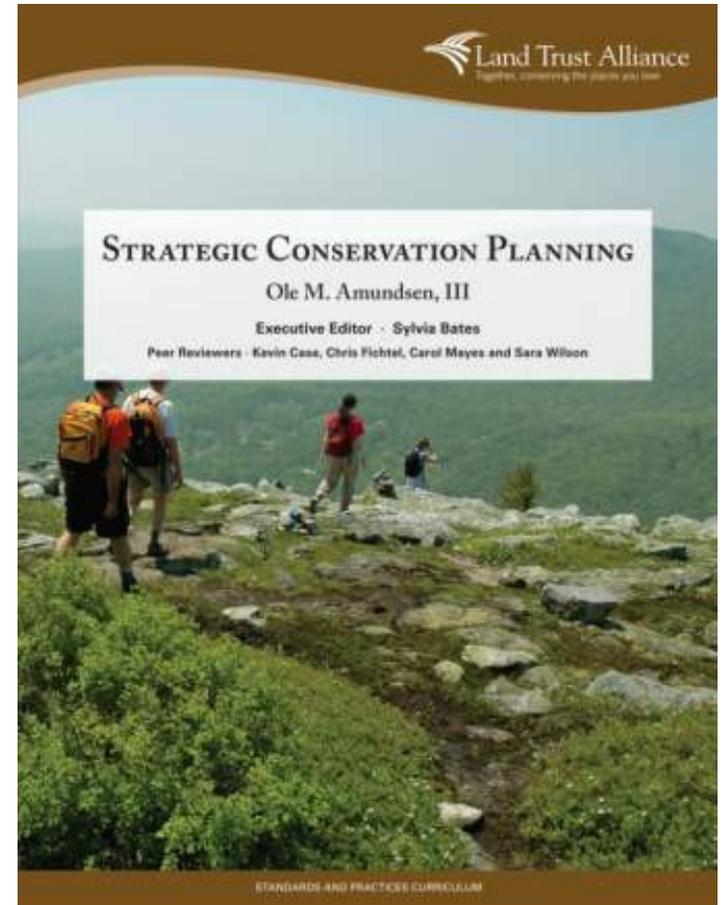
Strategic Conservation Planning: A Framework for Partnership

Ole Amundsen, The Conservation Fund

THE
CONSERVATION FUND

Strategic Conservation Planning

A process that produces tools to aid decision makers in identifying, prioritizing, pursuing, and protecting those specific tracts of land that will most effectively and efficiently achieve the land trust's mission.



Available From Land Trust Alliance
Publications website

The Planning Process

- ❖ Step 1: Get Started
- ❖ Step 2: Understand Your Community
- ❖ Step 3: Set Priorities
- ❖ Step 4: Implement Your Plan

Step 1.

Getting Started

Prerequisites

- Commitment of decision makers (board/staff)
- Existing land trust policies: mission statement, service area, and project selection criteria
- A willingness to use maps (hard copy or GIS)

Set Expectations & Establish Goals

Determine Leadership

Level of Public Engagement or Collaboration

Time, Funding and Help

May take between 12 to 18 months to complete

- Step 1. Getting Started (2 to 4 months)
- Step 2. Understanding Your Community (4 to 5 months)
- Step 3. Setting Priorities (4 to 5 months)
- Step 4. Implementation (2 to 4 months)

Funding – can range from \$1,000 to tens of thousands of dollars.

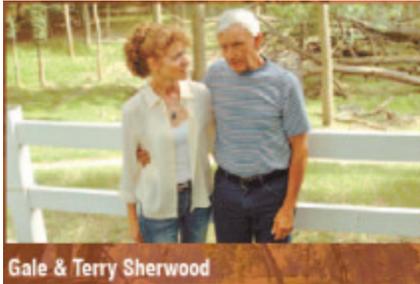
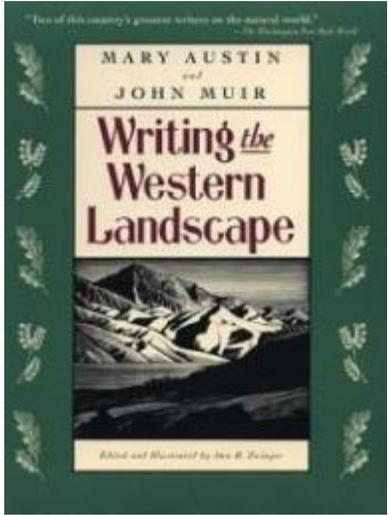
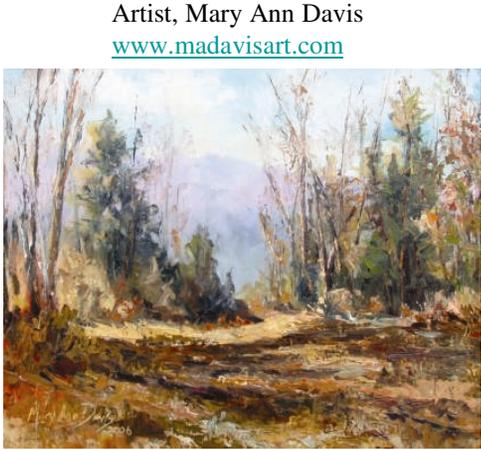
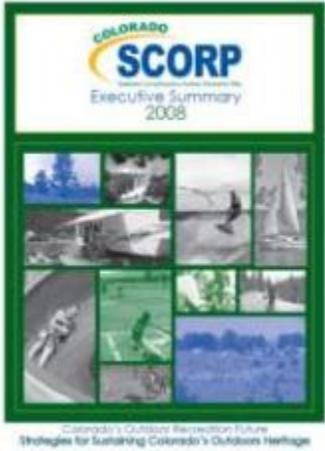
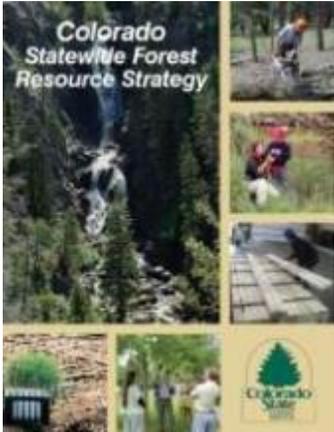
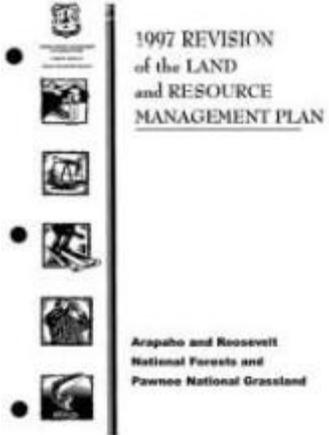
Step 2.

Understanding Your Community

- ❑ Identify and Gather Information
 - Inspirational Information
 - Technical & Reference Information
 - Mapping Information
 - Resource Inventories
- ❑ Analyze Information
 - Explore Local History and Demographics Trends
 - Create a Map of Conserved Land
 - Use Resource Inventories
 - Assess Threats to Resources

Technical Information

Inspirational Information

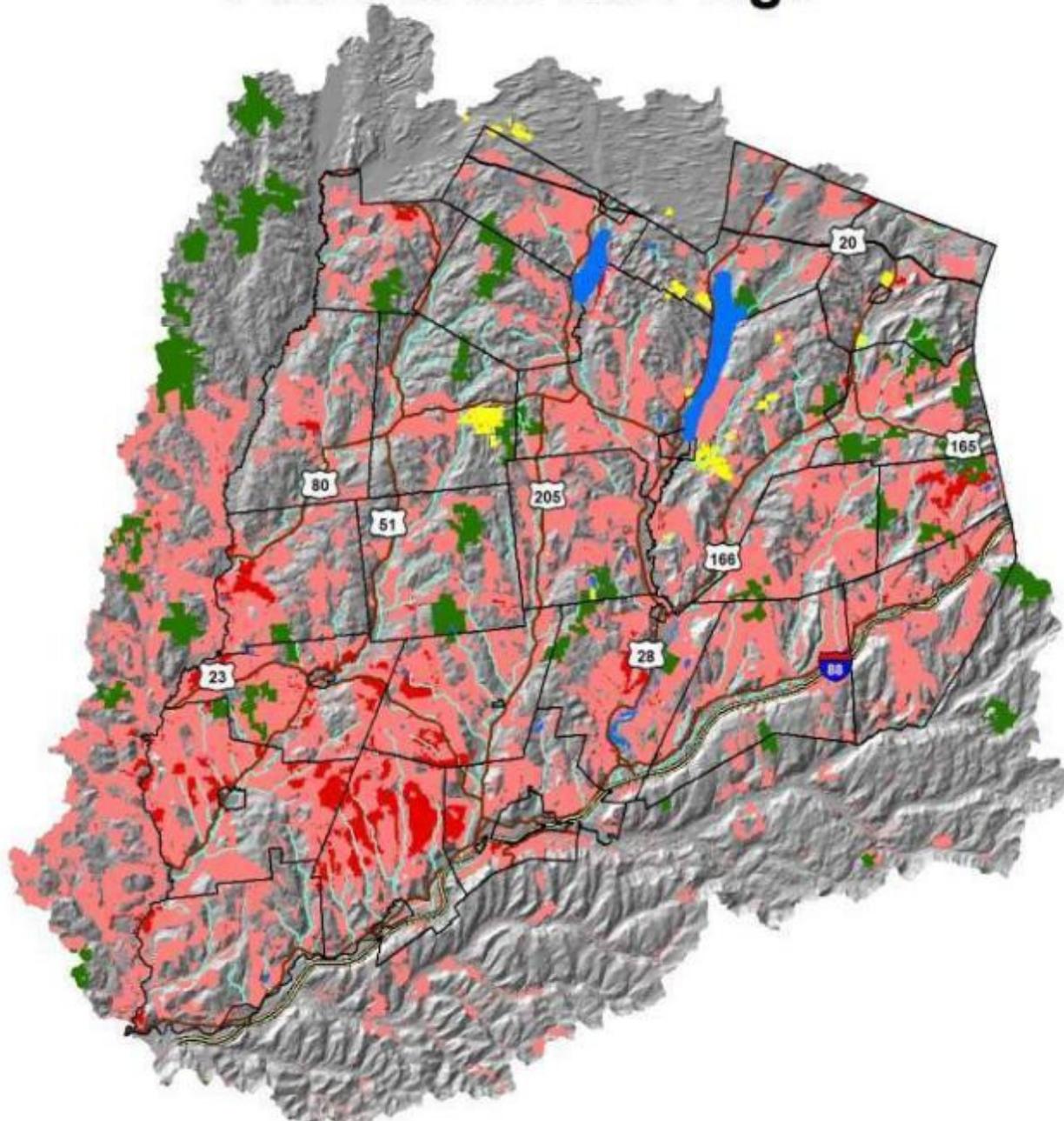


Assessing Resource Threats

- ❖ Scale of threat: global, regional or local?
- ❖ How long will the threat take to mature?
- ❖ Are all of the factors composing the threat within the control of your organization?



Forests on the Edge



Otsego County, New York



Legend

- Major Rivers - Streams
- NYS HWY
- US HWY
- US INTERSTATE
- Otsego Land Trust Easements
- State Protected Land
- Lakes
- Municipalities
- Projected increase from Rural I to Rural II
- Projected increase from Rural to Exurban

This map displays projected changes in housing density on privately owned forestlands by the year 2030. This map is best used at a county or town scale and not for individual parcel evaluations.

Data provided by the US Forest Service report "National Forests on the Edge" September 2007, Figure 4, page 10.

Rural I = Lands with 16 or fewer housing units per square mile

Rural II = Lands with 17 to 64 housing units per square mile

Exurban/urban = Lands with 65 or more housing units per square mile



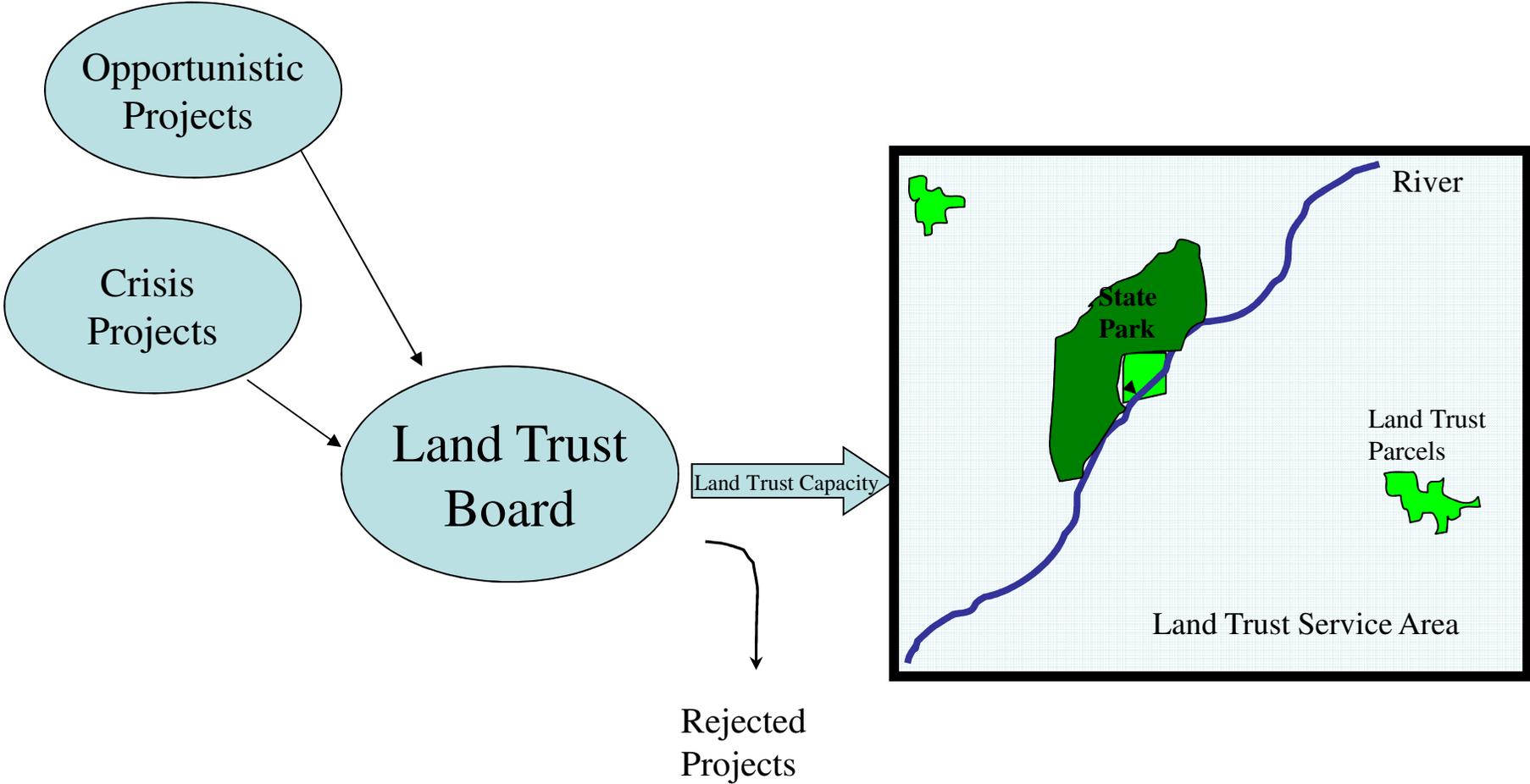
0 2.5 5 10 Miles

Step 3. Setting Priorities

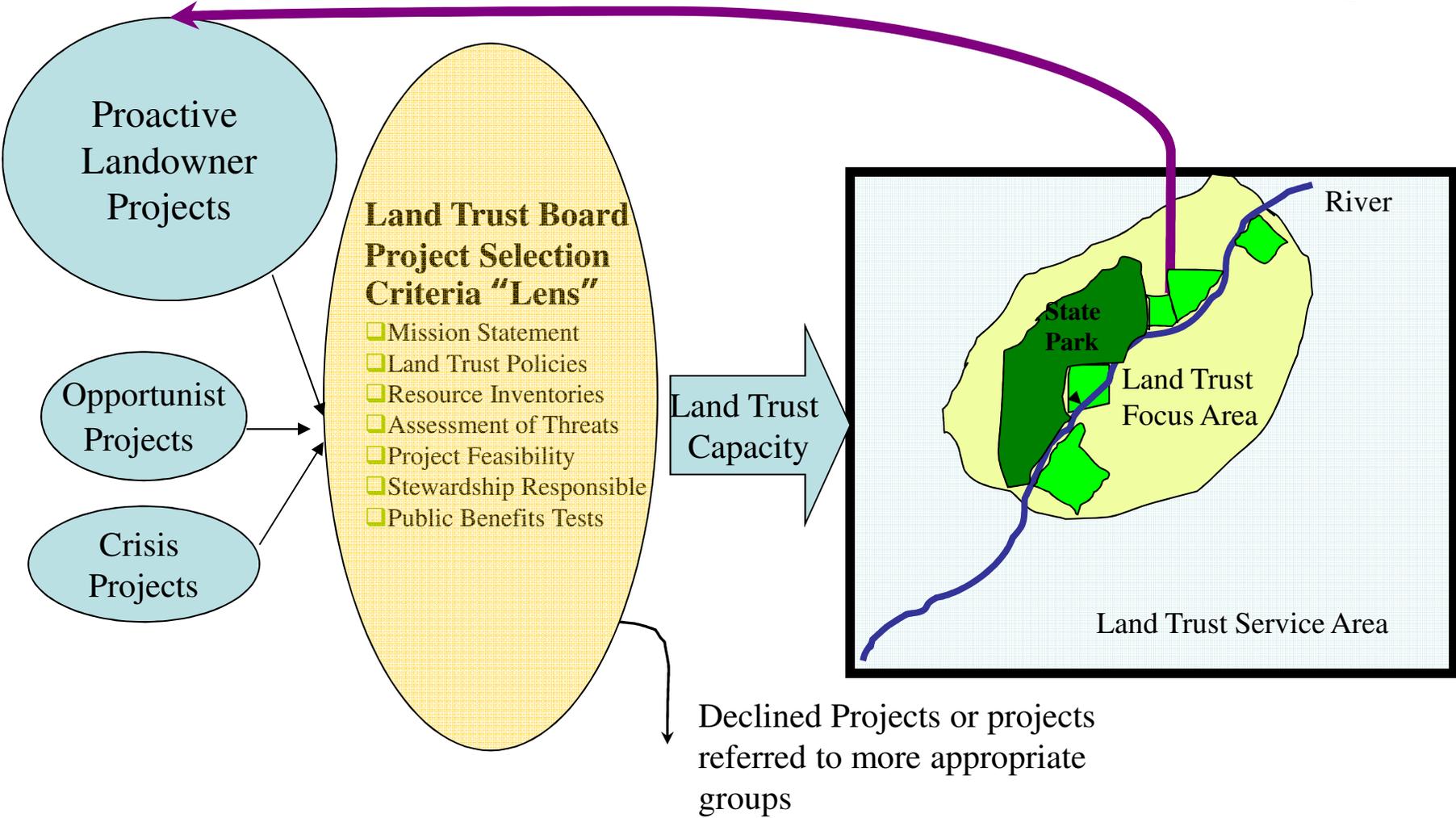
Select Appropriate Methods of Land Prioritization

- Project Selection Criteria
- Focus Areas Methods
 - Maps, Magic Markers, Minds (non GIS)
 - Overlay Analysis (both non GIS & GIS)
 - Suitability Analysis (advanced GIS)
 - Green Print (TPL advanced GIS)
 - Green Infrastructure (TCF advanced GIS)
 - Whole Systems (TNC – advanced GIS)
- Conduct Landowner Analysis within Focus Areas
- Use and link Mission Statement with Prioritization Methods

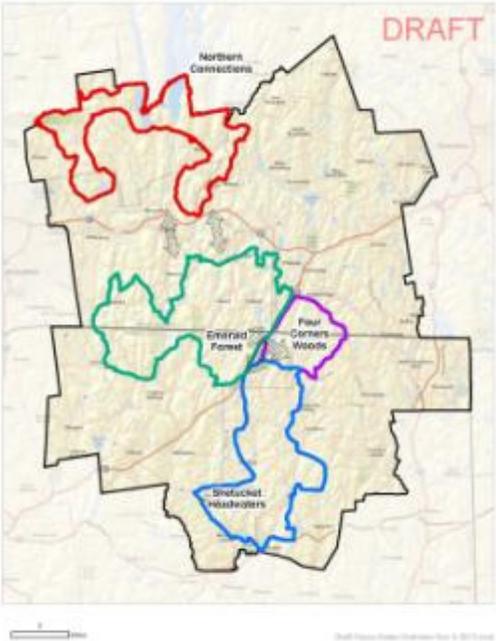
Opportunistic Decision Making



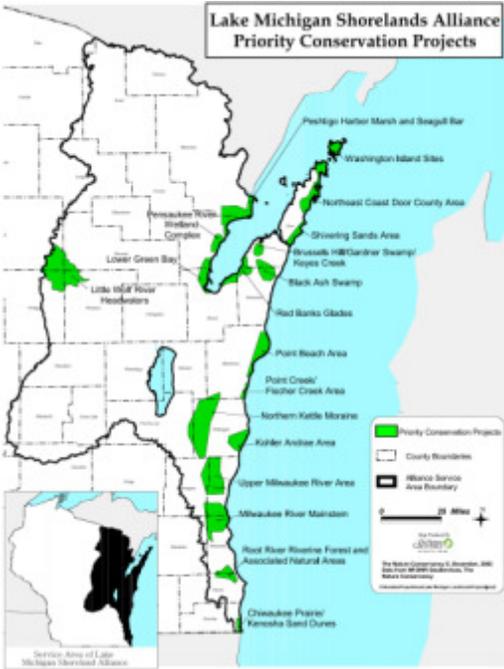
Strategic Land Conservation Decision Making



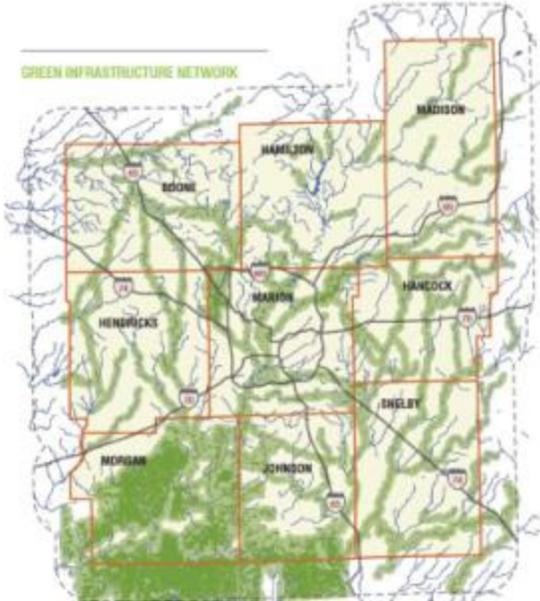
Massachusetts – Connecticut Sustainable Forestry Partnership

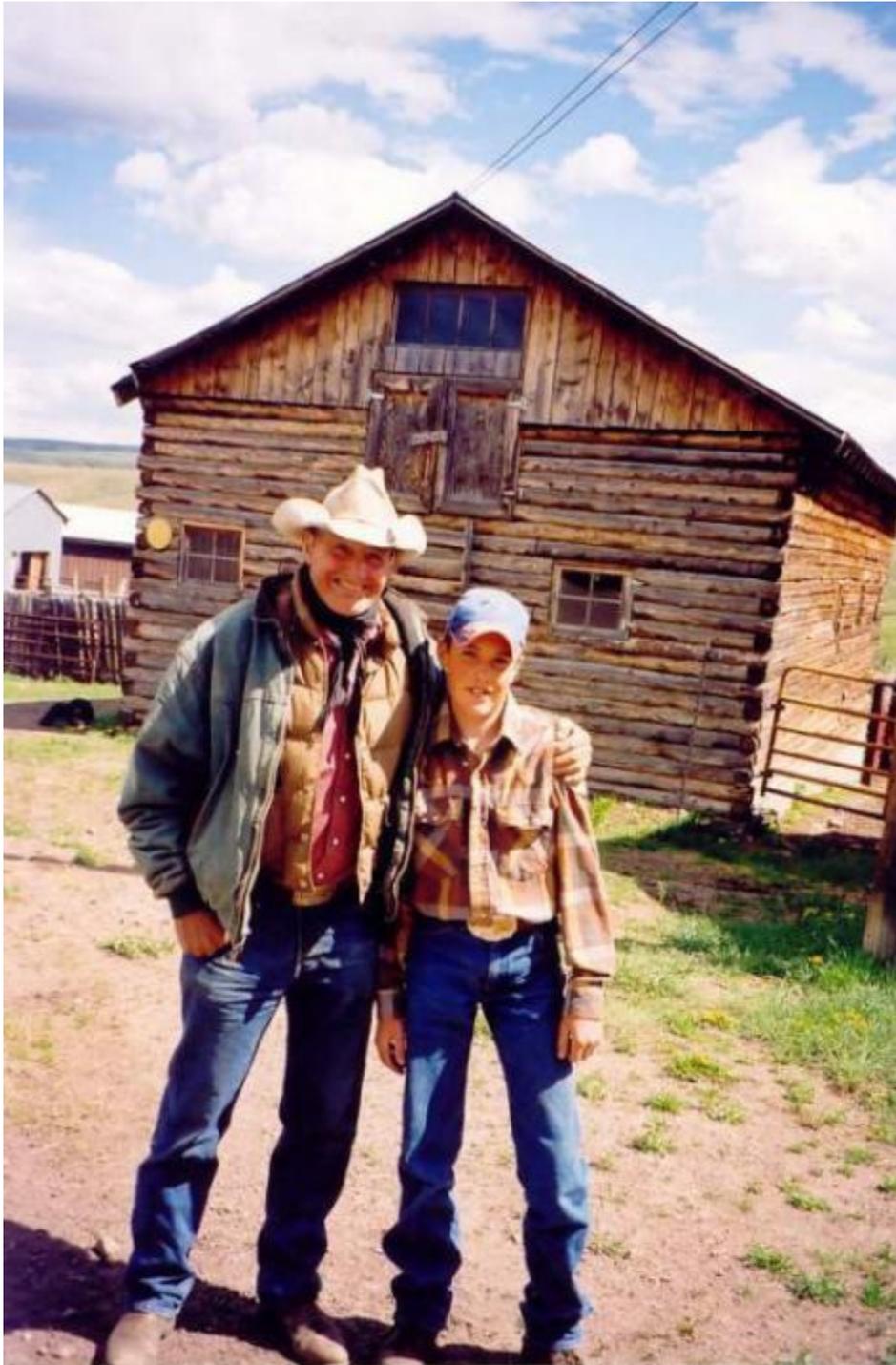


Gathering Waters Conservancy: Landscapes of Opportunity



Central Indiana Land Trust : Greening the Crossroads





Landowner Analysis and Outreach Begins Here!

- ❖ Look patterns
- ❖ What types of landowners are in your focus areas?
- ❖ For private individuals – who should make the first call or introduction?
- ❖ What's your approach to institutional landowners – like TIMOs, Colleges, Boy Scout Camps??

Step 4. Implementation

☐ Assessing Conservation Capacity

- Do you have the staff, volunteers, funding and other resources to carry out your vision?
- How many projects can the your organization process in a given year?
- How many years would it take at that pace to conserve the necessary land within the focus areas?
- Consider role of partners and collaboration

☐ Measuring Success

- Quantitative: bucks and acres
- Qualitative: sense of community etc.
- Establish timeframe for revision

Today's Implementation Tip: Bridge Financing

“Our first partnership with The Conservation Fund was in 1997-98. When you hike to the top of Mount Sugarloaf in Deerfield and look down on the Connecticut River Valley, much of what you can see has been protected by the Franklin Land Trust, often with help from the Fund.”

– Rich Hubbard,
Executive Director

Landscape Scale Lending to FLT
33 loans, \$7.5 Million, 3,100 acres





Kristin Sherwood
The Nature Conservancy

How to Build Partnerships that THRIVE

Kristin Sherwood



What is a Partnership?

An ongoing working relationship where risks and benefits are shared.



What is a Partnership, in practice?

1. Joint creation of projects
2. Commitment of tangible resources
3. Mutual accountability



A Strategic Approach to Partnership



Preparing to partner

1
PREPARE



To Partner or Not to Partner?



- New ideas
- Expanded scale
- Exchange technical expertise
- Provide, receive, or expand funding
- Share data
- Access to new constituents
- Leverage influence
- More time & cost upfront
- Increased coordination & communication needs
- Investment in maintenance
- Increased risks: unproductive relationships, partners not meeting goals/expectations, etc.
- Changing organizational visions and strategies

Partnership Intensity

Cooperation	Coordination	Collaboration
Lower Intensity/informal		Higher Intensity/formal
Shorter-term, informal relationships	Longer-term effort around a project or task	More durable and pervasive relationships
Shared information only	Some planning and division of roles	New structure with commitment to common goals
Separate goals, resources, and structures	Some shared resources, rewards, and risks	All partners contribute resources and share rewards and leadership
EX: Associations, networks	EX: Coalitions, project teams	EX: Joint ventures

Selecting Partners

2
SELECT



Partner Selection Process

2
SELECT



Scoping Checklist

2
SELECT

Does the partner have...	Current status	Further actions
A good track record?		
Good standing in the field/sector?		
Wide ranging contacts and influence?		
Skills and competencies that compliment your org/other partners?		
Sound management and governance structures?		
A record of financial stability?		
A stable staff group?		

Negotiating Agreements

3
NEGOTIATE



Spectrum of Partnership Documentation



Less Formal:
No documentation
Oral Contract

More Formal:
Memorandum of
Agreement
or Understanding

Most Formal:
Partnership
Agreement
Joint Venture

Partnership Agreements



- Goals and expectations
- Roles and responsibilities
- Joint work plan
- Financing and resource contribution
- Fundraising
- Communications (including media)
- Decision-making structure
- Partnership review and measurement
- Long-term planning
- Exit strategy

Managing the Partnership

4
MANAGE



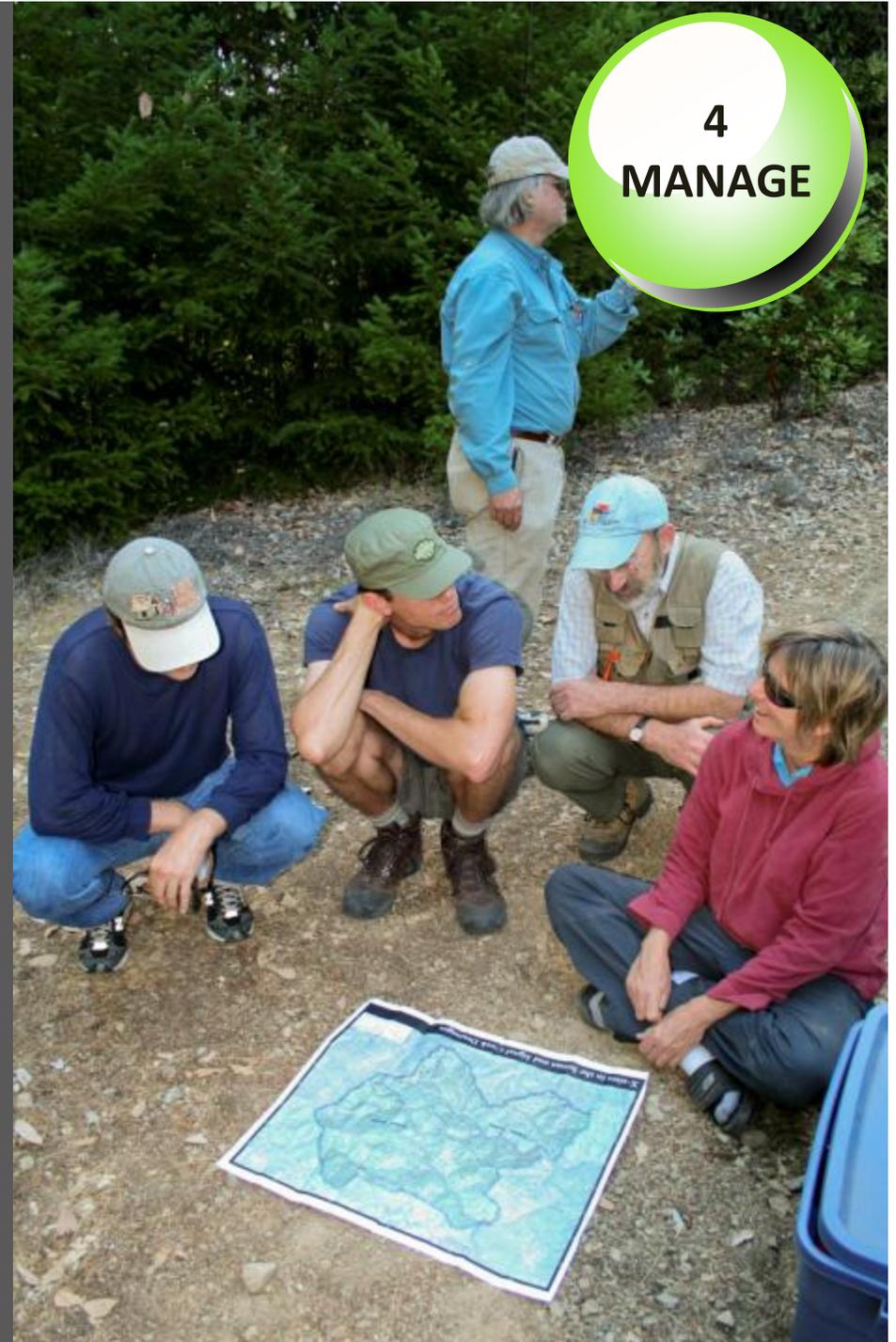
Quick Tips for Successful Collaboration

4
MANAGE

- Frequent communication, regular face-to-face meetings
- Take some field trips.
- Designate a coordinator or point person
- Get your boots muddy working on something tangible.



- Hire the right staff and clarify roles
- Joint work planning
- Manage conflicts and grievances
- Celebrate small successes



Measuring the Partnership

5
MEASURE



What to measure?

5
MEASURE

Operations

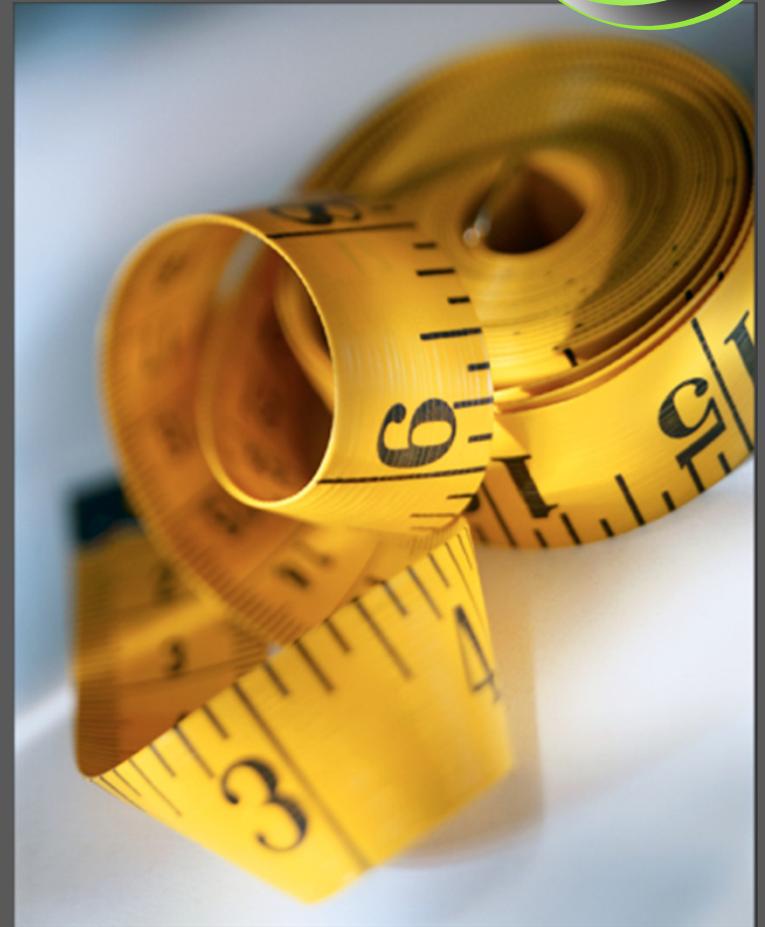
- Fulfillment of commitments
- Management
- External communications
- Transaction costs

Set up

- Governance structure
- Agreements
- Sufficient resources
- Clear roles
- Right partners?
- Clear review process

Partner Relations

- Internal communications
- Equity
- Transparency
- Institutional buy-in



Concluding or Adapting

6
CONCLUDE
OR
ADAPT





Concluding/Adapting

- Tendency is to focus on the beginning, not the closure.
- Most partnerships aren't designed or meant to last long term.
- All partnerships need to talk about the end at the beginning.

“At some point, the relationship will be so different from the one envisioned in this partnership, it will be time for this one to end. A successful exit to this partnership will be when Big Sur Land Trust is so fully competent that it has little to ask from TNC and TNC has little to offer, and when the conservation projects of mutual interest are completed.”

- Big Sur Land Trust – TNC Owner’s Manual



A Strategic Approach to Partnership



Resources

- TNC Conservation Partnership Center
www.conservationpartnerships.org
- World Wildlife Fund Partnership Toolkit
- The Partnering Initiative
- The Fieldstone Alliance





Melinda Pruett-Jones
Chicago Wilderness

A scenic view of a lake in Chicago with the city skyline in the background. The foreground is filled with green foliage and purple flowers. The text is overlaid on the image.

Chicago Wilderness

Strategic Conservation Collaboration for an
Enduring Impact

Melinda Pruett-Jones

METROPOLITAN GREENSPACES ALLIANCE

Chicago
Wilderness

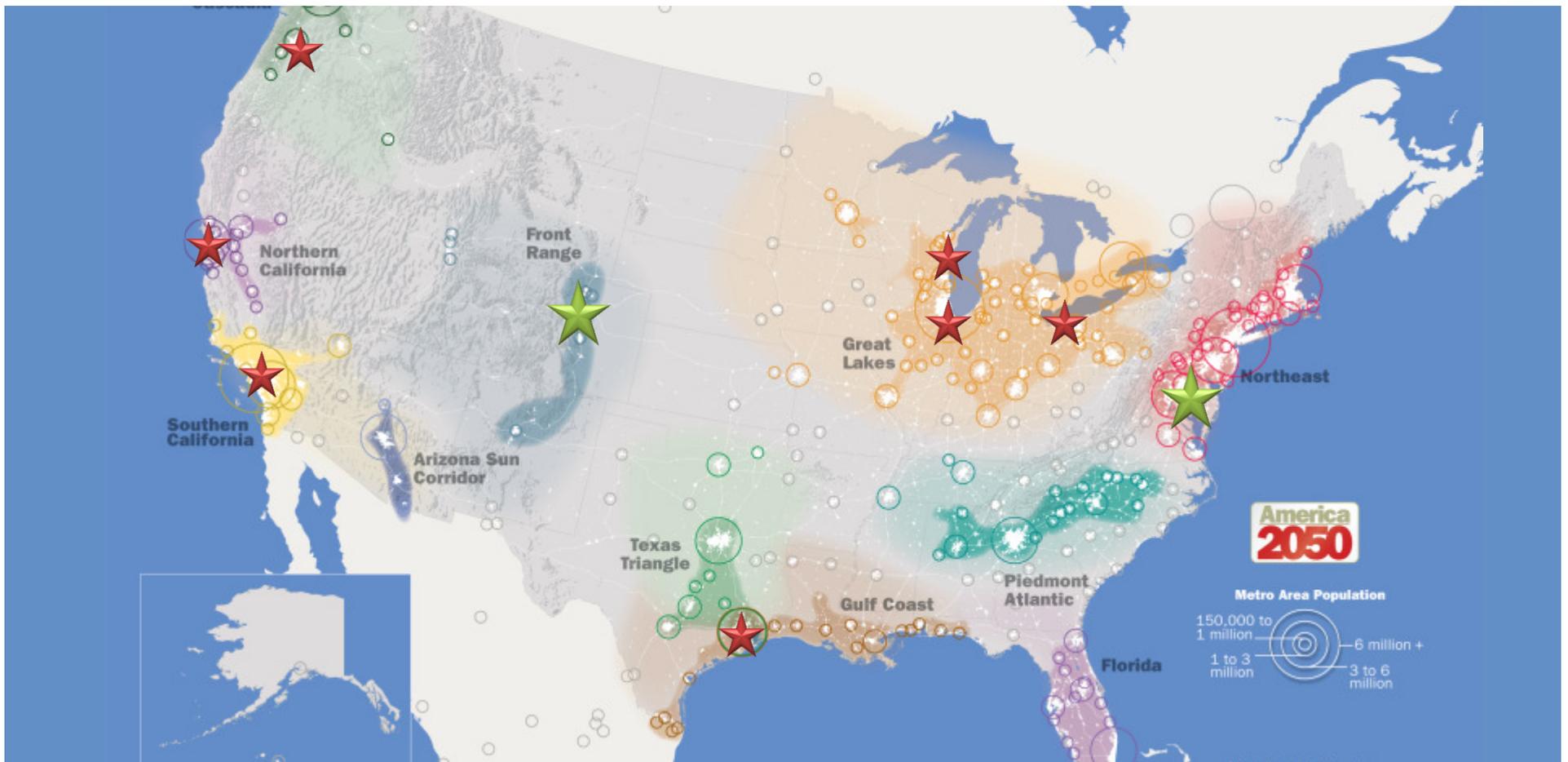


SOUTHEASTERN
WISCONSIN
WATERSHEDS
TRUST, INC.



BAY AREA

OPEN SPACE COUNCIL



The Chicago Wilderness Region

Globally Significant Biodiversity and 10 Million People

World's Third Largest Economy with a Gross Regional Product of \$530 Billion

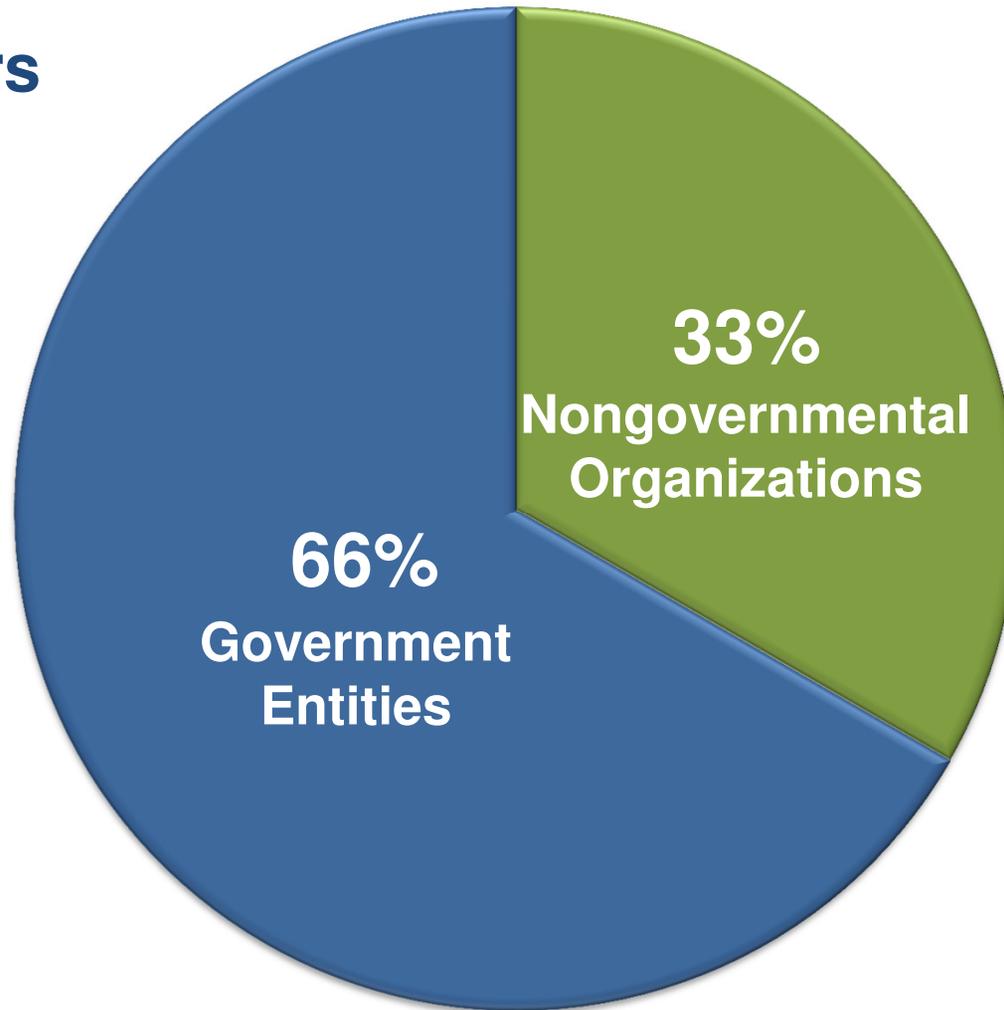


Elements of an Effective Coalition

- A compelling **Catalyst**
- **Regional Fit** of the problem-shed with stakeholders' interest
- Diverse **Leadership**
- Diverse **Representation**
- A culture-based **Governance** structure for decision-making
- A regional **Strategy** to respond that is beyond the scope of any one entity, despite their size or authority
- Structured processes for facilitating **Learning**
- The disciplines and the capacity to **Implement** actions aligned with the vision
- **Outcomes** achieved on the ground through collaboration

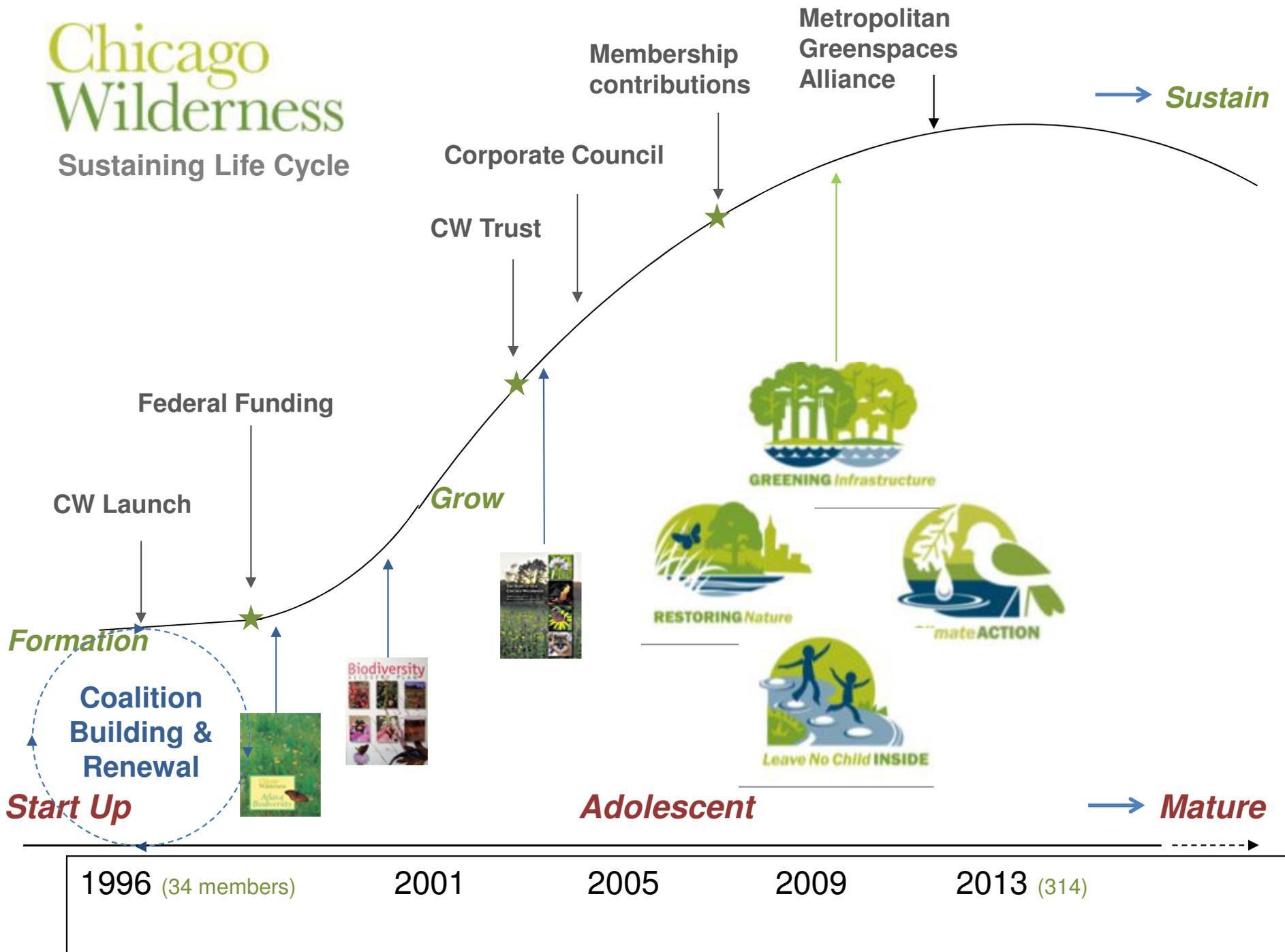
1996

34 members



Chicago Wilderness

Sustaining Life Cycle



Commission on Excellence in Ecological
Restoration and Native Landscaping

Sustainability Team

Trees & Green Infrastructure Task Force

Natural Resources Management

Leave No Child Inside
Task Force

Species Vulnerability Working Group

Barrington LNCI Network

100 Sites for 100 Years

Grassland Bird Working Group

Knowledge Base Working Group

Interpreters Task Force

Waukegan LNCI Steering Committee

GIV and Climate Change Working Group

Chicago Wilderness Teaching Academy

Sustainable Watershed Action

Climate Change

Next Generation of Conservation Leaders Working Group

Task Force

Aquatics Task Force

Green Infrastructure Vision

Congress Planning Committee

Task Force

Wildlife Task Force

Climate Change Education & Engagement Working Group

Education Team

ULTRA-ex Project Working group

Coordinating Group

Mighty Acorns Partnership

Oak Recovery Plan Working Group

Congress Youth Engagement Working Group

Science Team

Government Relations Committee

Burn Task Force

Climate Change and Stormwater Working Group

Index for Conservation Compatibility Working Group

Communication Committee

Species of Conservation Concern Team

RESTORE Project Working Group

Transportation and Green Infrastructure Working Group

Enduring Impact

- A bold, regional Biodiversity Recovery Plan
- A dramatic shift in the planning culture in the region to protect open space
- Over 500 conservation, research, education and outreach projects created, funded, and implemented by the alliance
- Tens of Thousands of volunteers as citizen scientists and stewards
- Leveraged resources to invest \$280 million to protect, restore & connect lands & waters

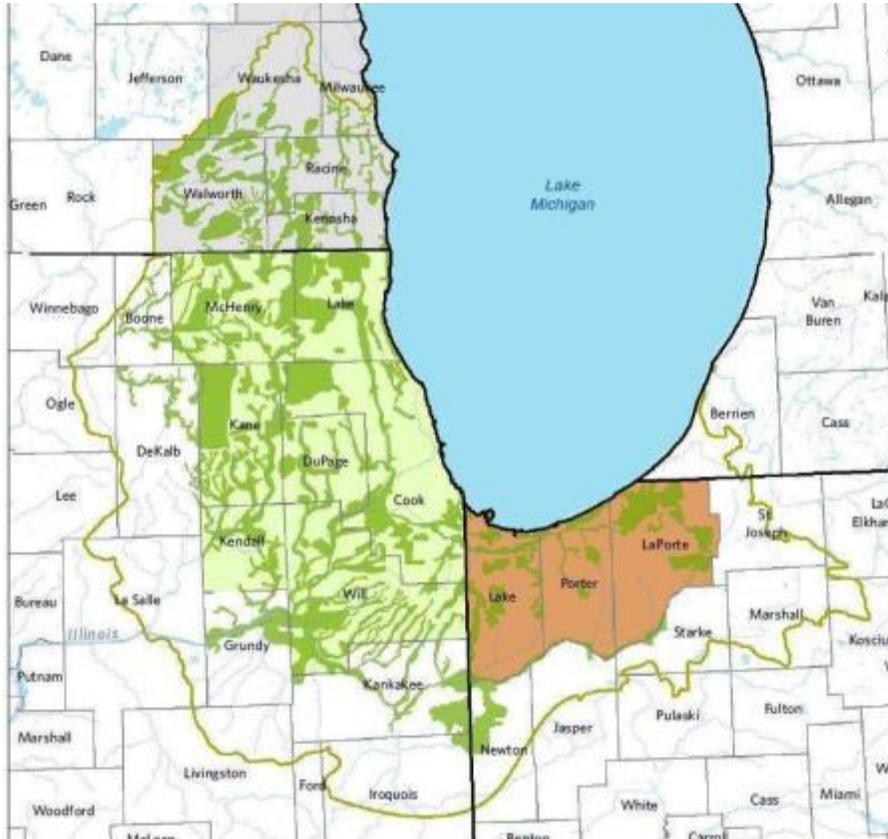


Chicago Wilderness Regional Vision

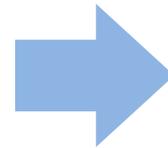


A network of 1.4 million acres of open space protected, restored and connected

Refining CW's Green Infrastructure Vision Over Time

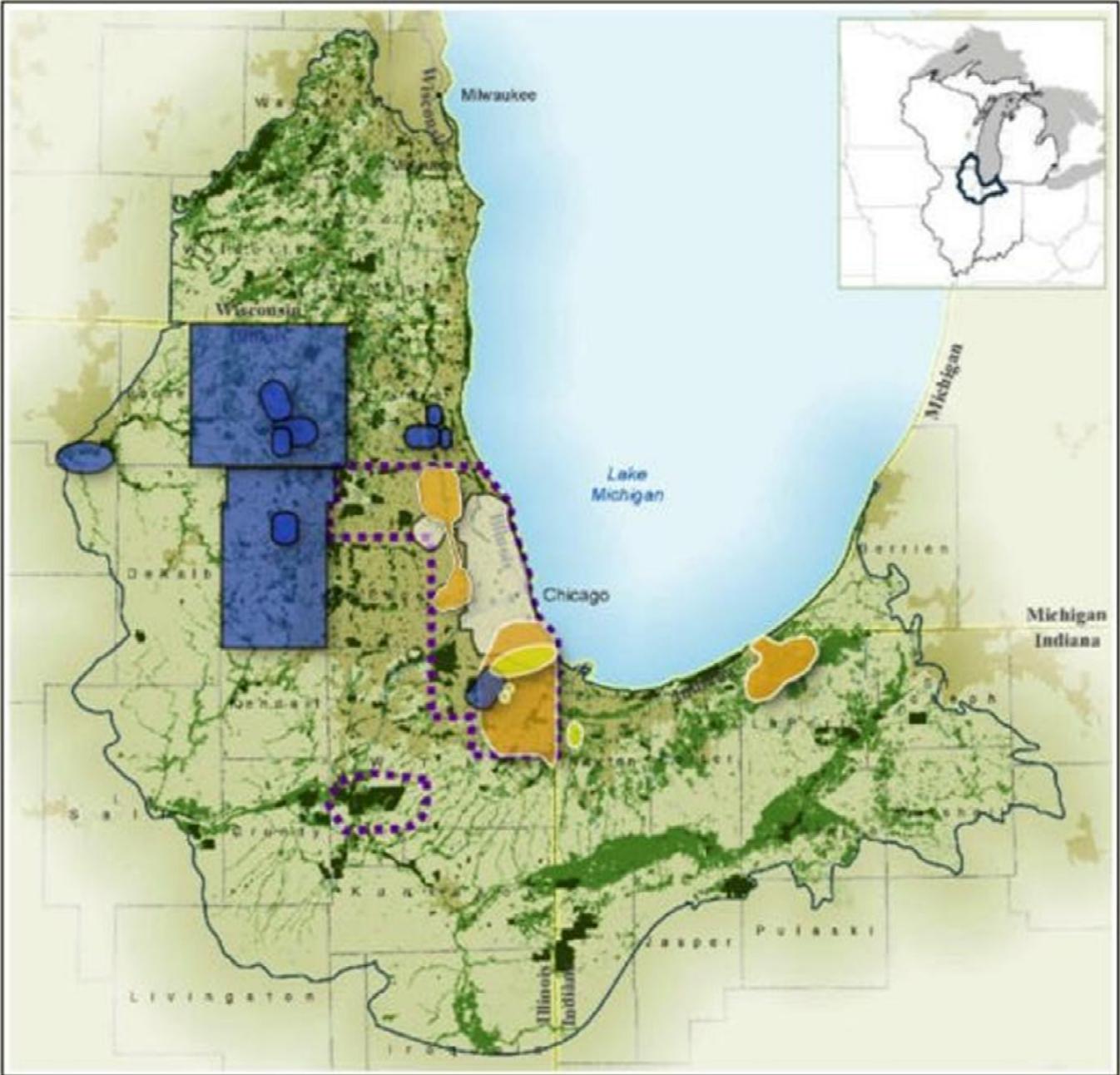


GIV 1.0
2004



GIV 2.1
2012

Implementing Green Infrastructure

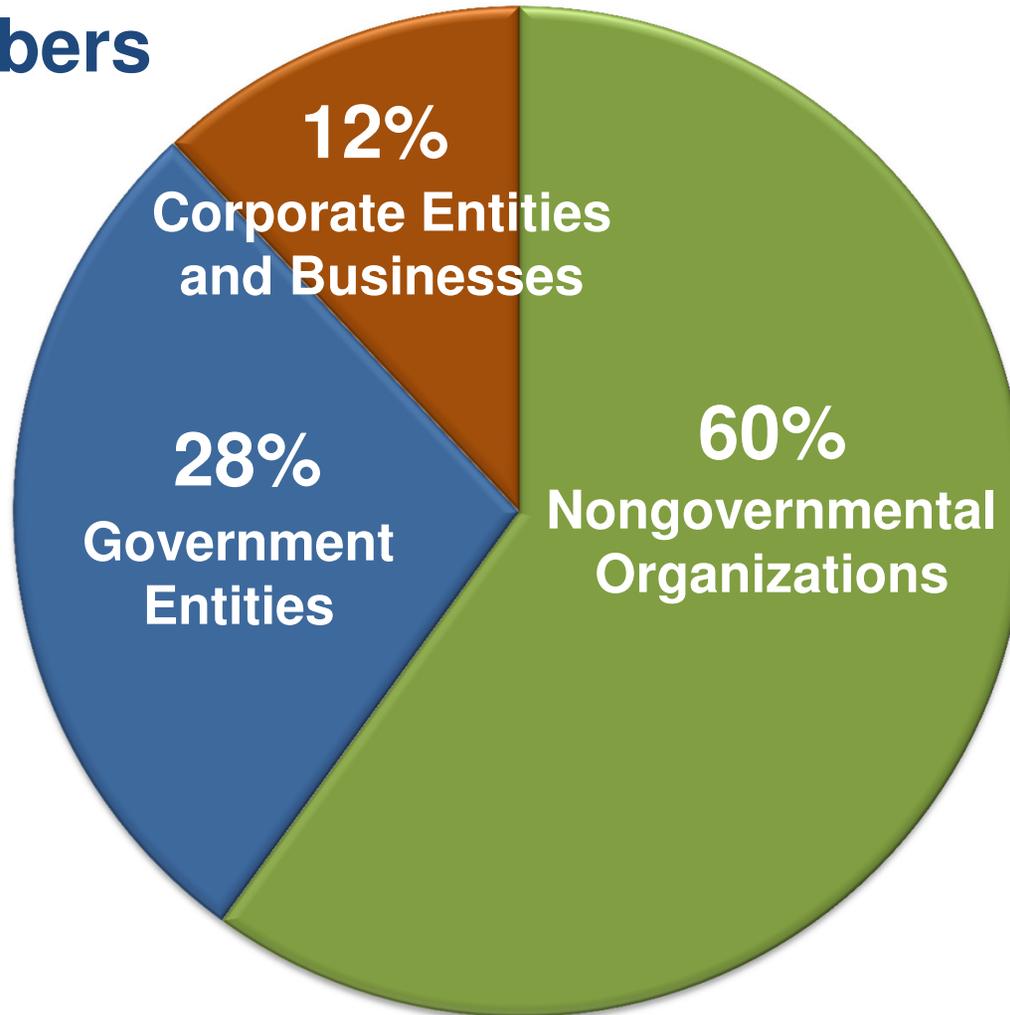


What Sustains Regional Action

- ✓ Demonstrated Progress & Success
- ✓ Capacity to address adaptive issues
- ✓ Capacity for shared leadership
- ✓ Capacity to engage broad support
- ✓ Organizational Capacity
- ✓ Fiscal and Technical Capacity
- ✓ Autonomy as a collective endeavor

2013

314 members



What Sustains Chicago Wilderness

- A deeply engaged core leadership
- Ownership: In CW, “Everyone Owns it, No One Owns it”
- Absolute clarity of mission: no “Creep”
- Decisions are made by consensus
- Alliance will not compete with its members
- Alliance attracts new resources to the region for conservation; financial, political, & civic support

Enduring Impact

- A bold, regional Biodiversity Recovery Plan
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- Over 500 conservation, research, education and outreach projects created, funded, and implemented by the alliance
- Tens of Thousands of volunteers as citizen scientists and stewards
- Leveraged resources to invest \$280 million to protect, restore & connect lands & waters





Chicago Wilderness

Questions and Answers

Ask questions through the chat pod

Session #17 – Conservation Planning Tools and Resources

Wednesday, August 21st at 2:00 pm Eastern

Patrick Crist

NatureServe - Vista and the EBM Tools Network

Kai Henifin

Conservation Biology Institute - Databasin

Scott Story

*Western Governors' Association - Crucial Habitat
Assessment Tool (CHAT) and Crucial Areas Planning System*



Future Webinar Topics

- **September** – Climate Change Adaptation
- **October** – Collaborative Forest Landscape Restoration
- **November** – Community Wildfire Protection Planning
- **December** – Planning for Urban Forests

Give us your feedback!

www.fs.fed.us/openspace/webinars

Or Contact

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Sara Comas - scomas@fs.fed.us

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