

Sample Document #6 Considerations for Collaboration

DRA - PWA Considerations for Collaboration

Option Consideration	Scenario 1 - Joint Projects, Shared Staff & Co-Location	Scenario 2 - Keep existing brands and 501(c)(3)'s, add overarching coordinating body/organization	Scenario 3 - Unification under new name
Duration	5-7 years	Permanent, though dissoluble	Permanent
Accreditation	Requires each org to seek/maintain accreditation separately	Requires each org, and possibly governing org, to seek/maintain accreditation	If unified under DRA's 501(c)(3) then accreditation carries forward
Stewardship Funding	No change to status quo	No change to status quo	Accreditation Commission will require total funding to match required levels within a specified timeframe
Planned Giving/Bequests	No change to status quo	No change to status quo, though see fundraising below	Requires clear crafting of legal paperwork so that all bequests to either org flow to new org - do-able!
Governance	Two boards remain, MOU establishes elements of shared decision-making within project/program context	Two boards remain and an overarching coordinating body is established, joint strategic planning likely/recommended	Two boards merge into one, must determine proportions, establish new by-laws, for example handling of term limits
Fundraising	Brands remain intact, donors may be pleased by increased collaboration, though donor confusion may be an issue based esp. on co-location	Donor confusion likely, how do brands intersect?, "to whom should I give?"	Must bring donors along, demonstrate increased effectiveness; possibility for substantially greater fundraising esp. through development specialization
Communications	Maintain separate brands, newsletters, communications strategy; integrate for shared programming	Introduce new brand?, establish best plan for communications, joint newsletters/communications with focused sections?	Requires rebranding, new signage, deep and sustained donor outreach, advertising; featuring stories in both watersheds is key
Endowment/Restricted Funds	No change	Requires attention to use of funds for specified purposes	Essential to document all history and requirements of endowment and other restricted funds

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Volunteer Engagement	Opens door to even greater cross-pollination	Allows for further volunteer integration, and possibly joint volunteer management	Requires clear commitment to volunteer-based work, allows for more sustained volunteer management; frees volunteers to focus on what they love most
Administration and Facilities	Shared equipment, facilities costs; challenge of allocation	Clearer terms for assessing costs, but separate insurance and annual filing (990, state charitable paperwork, etc.) still required, plus needed for new umbrella if in fact umbrella is itself an incorporated organization	Shared insurance, HR, filing, databases, along with savings noted in Scenario 1
Staff Sharing	Targeted; may be challenging to allocate	Complete; allows economies of scale for HR and benefits, though some level of policy and pay harmonization would be required	All under one organization; allows economies of scale for HR and benefits; requires integration of personnel policies and harmonization of compensation
Durability of Conservation	Opportunities for additional cross-holding/second layer of protection	Opportunities for additional cross-holding/second layer of protection	Would be beneficial to craft declarations of trust on existing conservation lands as second layer of protection
Conservation Land Holdings	No change to status quo in terms of who owns what, though future holdings would more targeted and integrated	No change to status quo, though even more than in Scenario 1 would likely be viewed, presented and managed in a more systematic manner	Brought under one organization; totally integrated, may be required to redirect some conservation easements to another org
Policies	Little change necessary; relationship to be codified in MOU	Harmonize advocacy, acquisition, staff and stewardship policies	Single set of policies, drawing from best of both parent orgs

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Program Integration	Allows for increased staff specialization	Allows for increased staff specialization	Highest level of staff specialization
> Land/Easement Acquisition	Establish project-based joint lands committee	Single unified land conservation strategy for peninsula, plus additional targets beyond	Unified lands program, single lands committee, total integration at landscape scale
> Stewardship	Economies of scale for easement monitoring	Economies of scale for easement monitoring and perhaps preserve management	Unified program with maximum specialization and strong coordination
> Education	Increase shared programming	Better integrate education programming across service areas	Unified, comprehensive education programming across service region
> Water Quality	Opportunities to share equipment and protocols, share data	More closely integrate monitoring programs, data and training	Align existing water quality programs, create integrated whole, with greater specialization
> Other Programs	Ad hoc possibilities for cross-promotion, resource sharing	Joint scheduling and promotion of events, de-duplication, shared calendar?	Careful and strategic selection of highest return programming is essential, while remaining sensitive to roots/donor affiliations