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PERSPECTIVE

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Best practices for collaborative conservation philanthropy

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Abstract

Collaborative conservation brings diverse stakeholders together to sustain healthy landscapes and strengthen communities. Organizations fostering collaborative conservation depend on philanthropy to advance collaborative conservation, while philanthropic organizations depend on these organizations to advance their missions. Both face challenges engaging with each other as they work toward shared goals, yet open dialogue about how funders and practitioners work together is rare. The authors of this paper represent equal numbers of funders and practitioners who, together, identified eight best practices that are practical, effective actions funders and practitioners can take to better achieve shared conservation goals. These eight best practices are: (1) collaborate, (2) nurture relationships, (3) invest in capacity, (4) plan well, implement well, (5) engage diversity, (6) support entrepreneurial spirit, (7) reduce burdens, and (8) tell our story. By centering around collaboration, relationships, and diversity, these best practices exemplify several growing and valuable trends in philanthropy that support collaborative conservation.

KEYWORDS

American west, capacity building, collaboration, collaborative conservation, collaborative infrastructure, conservation organizations, conservation philanthropy, diversity, philanthropic foundations

1 | INTRODUCTION

Collaborative conservation brings diverse stakeholders together in a sustained consensus building process to address complex environmental management challenges (Collaborative Conservation Mapping Project, 2021; Huayhuaca & Reid, 2019; Margerum, 2008). Within conservation, private funding sources have become increasingly important (Bakker et al., 2010; Betsill et al., 2021), and funding is among the largest obstacles for collaborative conservation practitioners (Center for Collaborative Conservation [CCC], 2017). Philanthropy is evolving to become more prominent in conservation (Armitage et al., 2012; Betsill et al., 2021), and collaborative conservation is evolving into more contexts and larger scales (Huayhuaca & Reid, 2019). How philanthropy interacts with collaborative conservation is evolving, too. To support this evolution, we offer eight "best practices" in collaborative conservation philanthropy.

These best practices emerged from open dialogue among eight funders and eight practitioners during a 1.5-day workshop. Workshop participants work for both small and large organizations across the American West on topics including land and water stewardship, climate resiliency, food systems, and social justice (Table 1). The workshop included equal numbers of men and women, and several participants contributed Indigenous and Latino perspectives. Appendix S1 contains a description of methods.

Our workshop was rooted in the idea that funders and practitioners with extensive experience in conservation have valuable perspectives on best practices for the field. In this paper, we connect the results of our workshop to current practice and scholarship while emphasizing that the unique aspect of this paper is the decades of experience of workshop participants.

2 | BEST PRACTICES FOR CONSERVATION PHILANTHROPY

We define best practices as practical, effective actions that funders and practitioners of collaborative conservation can take that are understandable, inclusive, and adaptable. Consistent with common definitions (e.g., Merriam Webster, 2022), we propose that these best practices will produce better results if adopted widely, as both general principles and specific guidelines. For each best practice, we describe what it is, why it is important, and what funders and practitioners can do to implement the practice.

2.1 | Collaborate

Collaborate refers to engaging diverse stakeholders in an intensive and creative process of consensus building with a sustained commitment to problem solving (Margerum, 2008).

When done well, collaborative conservation yields many benefits. It multiplies impact, leverages resources, and improves accountability (Water Funders Initiative, 2016). It can reduce conflict and help groups achieve common environmental, social, and economic goals (Conley & Moote, 2003; Gray, 1989). Because they have support from diverse interests, collaborative outcomes are less vulnerable to political change (Huayhuaca & Reid, 2019). When rooted in local voices, collaboration ensures that plans align with community values and allows sharing of power, influence, and ownership among participants (Belton & Jackson-Smith, 2010; Gibson, 2019). Increased collaboration between practitioners and funders can better align funding to on-the-ground needs.

To collaborate effectively, diverse stakeholders must be engaged early in the process. To ensure the appropriate diversity of interests are involved, we recommend conducting a stakeholder assessment to understand the

TABLE 1 Characteristics of workshop participants

Participant type (location)	Types of expertise	Years of experience	Organization's annual budget	Geographic focus	Topic focus
Practitioner (Montana)	Grant writing, EPA work groups, Resource Conservation Recovery Act Director, National Tribal Caucus, governmental advisory committees	29	$1 M	The Blackfeet Reservation	Natural resources, environment, and human health on the Reservation
Practitioner (Idaho)	Wildlife/conservation research, community-based rural development and land stewardship, natural resource monitoring, facilitation, nonprofit governance	30	$400,000	Upper Salmon River Region, Central Idaho	Rural communities, economic development through land stewardship, civic dialogue/collaboration, education, workforce development
Practitioner (Arizona)	Land and water conservation, stormwater management, outreach, governance, policy, research, monitoring	25	$1.5 M	Verde River Watershed	River/watershed conservation, habitat restoration, Verde Watershed Restoration Coalition
Practitioner (Colorado)	Private land conservation, fundraising, organizational governance, public policy	20	$1.4 M	Statewide	Conservation of private working lands
Practitioner (Arizona, New Mexico)	Youth development, professsional development, working with Indigenous populations, natural and cultural resource protection	15	$6 M	Southwestern US	Conservation Corps, Indigenous youth and communities, workforce development, sustainable agriculture
Practitioner (Colorado, New Mexico)	Landscape ecology, environmental monitoring, watershed and forest health, public facilitation and community outreach, public and private fundraising	30	$3 M	Four Corners, Southwestern US	Forest, water, communities, climate
Practitioner (Colorado)	Fundraising, non-profit development, capacity-building, multi-stakeholder partnerships, policy	10	$1.2 M	Southwestern US	Riparian lands, restoration, invasive plant removal, revegetation, community engagement and stewardship
Practitioner (New Mexico)	Private land conservation, government affairs, public policy, fundraising, non-profit development, capacity-building, multi-stakeholder partnerships	18	$685,000	Northern New Mexico	Economic development through land stewardship, wetland and ag land restoration, ecological monitoring and agriculture education programs, Youth Conservation Corps, programs informed by Indigenous and legacy Hispano cultural practices

(Continues)

TABLE 1 (Continued)

Participant type (location)	Types of expertise	Years of experience	Organization's annual budget	Geographic focus	Topic focus
Funder (Colorado)	Water policy, private foundations, grantee management	27	$100 M (Environment Program only)	Global with a focus on North America	Water sustainability in the Colorado River Basin, water quality in the Mississippi River Basin, and sustainable fisheries in the oceans.
Funder (Colorado)	Private foundation and public charity management	40	$2 M	Colorado and some international	Science, technology, engineering, and math
Funder (Montana)	Private foundation operations, public policy, grassroots organizing, conservation strategy	27 (conservation) 8 (foundation)	$2.5 M (Montana only)	Montana	Wildlife and wildlands protection, community collaboration, environmental education, civic engagement, Native American empowerment
Funder (Colorado)	Global, national, and local organizations	15 (conservation) 42 (financing involving non-profits)	Varies per organization worked with/ affiliated with	National; conservation mostly Colorado focused	Financing large grasslands focused projects, small and large local conservation easements, community-focused environmental learning
Funder (New Mexico)	Private foundation operations, public policy, food, and agricultural systems, federal, state, and tribal government, food and beverage hospitality	4 (public policy) 1 (foundation)	$1 M	New Mexico	Food and agriculture, farmland and rangeland health, farmer and rancher viability, stakeholder alignment
Funder (Montana)	Community-based and large-landscape conservation	2	$3 M	The American West	Wildlife, wildlands, clean water, supporting Indigenous inclusion and leadership.
Funder (Colorado)	Land use and environmental law and facilitation	40+	$175,000	Northern Colorado, central Ohio, Washington, DC	Land and water stewardship, climate. International health
Funder (Colorado)	Private foundation operations, land conservation strategy, regenerative agriculture, nature-based climate solutions, local watershed collaborations	10	$3.6 M	Colorado, California, Intermountain West	Land and water stewardship, climate, food systems, social justice
Facilitator (Colorado)	Land protection, community engagement, community-based collaborative conservation	29	$700,000	Western US	Capacity building for collaborative conservation

TABLE 1 (Continued)

Participant type (location)	Types of expertise	Years of experience	Organization's annual budget	Geographic focus	Topic focus
Facilitator (Colorado)	Conservation science, plant ecology, water, organizational leadership	27	$700,000	Western US	Capacity building for collaborative conservation, water, forests, land protection, diversity

range of interests and the distribution of power (Reed et al., 2009). Funders, practitioners, and the communities they serve must be willing to invest the substantial time needed to build relationships and establish trust (Wilmer et al., 2021). Because of the time needed to build relationships, there is often a significant time lag between building collaborations and on-the-ground conservation impact (Skyelander et al., 2020), so persistence and a long-range view are needed.

Among diverse stakeholders interests often compete, therefore we recommend that funders and practitioners hone their skills in constructive conflict (Shonk, 2020). Stakeholders must be able to participate openly, speak freely, and be willing to engage in difficult conversations with an intention of listening to and respecting differences. Creating this open dialogue can be challenging (Pitkin, 2020) and at times these dialogues are filled with deeply-rooted sources of conflict (Madden & McQuinn, 2014), so a skilled neutral third-party who can manage and facilitate the collaborative process should be considered.

2.2 | Nurture relationships

Nurture relationships refers to intentional efforts to cultivate connections and networks among funders, practitioners, and community partners.

Strong relationships are at the heart of effective collaboration. Relationships among funders, practitioners, and community partners are critical for creating the shared ownership of goals, plans, and outcomes, and for aligning goals and actions. Strong relationships include honest and open communication, which, over time, build trust between organizations and leads to greater effectiveness together (Covey & Merrill, 2018).

Landscape-wide networks of funders and practitioners can lead to collective learning and large-scale action (Gilson & Garrick, 2021). Funder networks built around specific topics can share learning, connect to new practitioners, and create pooled funding opportunities to amplify impact. Practitioner networks can share resources, build collective capacity together, and join forces for funding opportunities.

To nurture relationships, practitioners and funders should be deliberate about tracking their most vital relationships and employ a range of methods to stay in touch, including personal emails and phone calls, meals together, social events, organized field trips, and newsletters and social media. Newsletters and social media can reach many people at once but offer one-way communications only and can feel impersonal. To create deeper, more personal connections, consider stepping outside the office and beyond an agenda, where open-ended, curious conversation can flow freely. Creating experiential learning opportunities together helps secure bonds between individuals. Funders can cultivate networks among their portfolio of practitioners by convening gatherings where relationships can be formed, peer-to-peer problem solving explored, and innovative ideas born.

Since relationship building takes time and resources, funders and practitioners should identify the number of relationships that can be authentically managed by a single individual. Staff time should be managed accordingly, and staff should be added if needed and feasible.

The benefits of strong relationships are worth the investment. For example, in 2018 a group of funders and practitioners launched the Conservation Futures Project (Appendix S1) to create a shared vision for land conservation in Colorado. This collaboration led to the creation of "Keep It Colorado" (2022), a new network of land trusts that increases their individual effectiveness by creating a common voice for the land trusts and a community of practice where organizations can learn from each other.

2.3 | Invest in capacity

Invest in capacity refers to directing resources toward building and sustaining staff, organizational systems, physical infrastructure, and the knowledge, skills, and abilities of staff and volunteers.

Investing in capacity can be challenging for funders for several reasons. For example, the relationship between investments in capacity and conservation outcomes is often unclear, making it difficult for funders to justify these investments. Nonetheless, non-profits require facilities, staff, and training to achieve their mission (Dennis-Bishop, 2019). Limiting funding to discrete projects may constrain conservation gains because of capacity limitations.

Many conservation organizations report insufficient funding to develop staff and board members' skills like fundraising, strategic planning, and project management (CCC, 2017). These organizations and their funders should invest in building these core skills. Small foundations and individual philanthropists have capacity challenges, too, so we recommend they consider whether investing resources in their own capacity, even at the expense of future granting potential, may be an effective tradeoff.

Smaller non-profits at the core of many collaborative conservation initiatives can be especially hobbled by a lack of sustainable capacity, including backbone staff for activities like grant management and communications. When awarding grants, funders should consider dedicating some of their investment to these activities. We recommend that practitioners and funders consider merging small non-profits that have overlapping missions to spread the costs of backbone staff more widely. They should also be careful about creating new non-profits where an existing organization doing similar work already exists. Small organizations with essential but limited administration and communication needs can consider sharing staff. Capacity at smaller organizations is particularly vulnerable to funders changing strategic direction, so when such changes are anticipated funders should give ample notice, make connections to other funders, and, if possible, contribute to endowments (Petrovich, 2011).

If funders are expected to invest more in capacity, practitioners must clearly demonstrate the value of those investments. If both groups collaborate closely, funders will have more opportunity to challenge grantees to describe the return-on-investment of capacity investments, and practitioners will have more opportunity to build trust with their funders through close and frequent communication about the return on those investments.

2.4 | Plan well, implement well

Plan well, implement well refers to proactively strategizing about goals and tactics, then deliberately implementing projects to achieve those goals.

Strategic plans and the project plans that follow are foundational to an effective organization by making clear how the organization will have the impact it intends. These plans give funders confidence that their grantees have thought through their theories of change and will stay focused. Done well, these plans incorporate a prioritized approach to achieving outcomes that support the values of the organization and the communities being served.

Practitioners should ensure their organization creates a strategic plan that contains values, vision, mission, and a theory of change. The plan should articulate strategies, specific actions, anticipated outcomes, and methods for measuring outcomes and impact (Bryson & Alston, 2011). Including one or more funders in the planning process can ensure that funder constraints and opportunities are recognized in the plan. As organizations pivot from internal planning to working with a community, they should consider a collaborative approach that engages stakeholders in their community to define shared goals, co-design activities, and establish an inclusive and equitable governance structure (Lichtenfeld et al., 2019). A good plan is easy to read and accessible to stakeholders. It is also iterative and dynamic, being visited and re-evaluated regularly.

Before implementation, practitioners and funders should consider resources needed to execute the plan effectively and efficiently. Intended actions and outcomes should be clearly articulated and conveyed to stakeholders, local government, and the media. Collaborative groups tend to under-report outcomes that follow from implementation (Wilkins et al., 2021), so metrics to assess performance should be described, tracked, and reported to staff, boards, funders, and communities throughout the life of the plan (Lamoreux et al., 2014).

2.5 | Engage diversity

Engage diversity refers to the practice of including people from different backgrounds, including race, ethnicity, gender, sexual orientation, religion, education, socioeconomic status, etc.

Despite Black, Indigenous, and People of Color and low-income communities being on the front-line of climate-related impacts and biodiversity loss (Pearson & Schuldt, 2014; Rysavy & Floyd, 2016), conservation has lacked racial and gender diversity (Johnson, 2019; Taylor, 2014), and this lack of diversity persists. For example, in their examination of collaborative venues in the Colorado River Basin, Karambelkar and Gerlak (2020) found that diverse stakeholder participation remained uneven within and across venues.

Engaging diversity requires coordinated, intentional actions and takes investments of money, staff, and time.

Funders and practitioners who are not from historically marginalized groups need to take the first step by doing their own internally-facing work (DiAngelo & Menakem, 2020) to understand the history and current status of political, social, and economic structures and dynamics that disempower and marginalize communities (e.g., Spence, 1999; Villanueva, 2021). For example, conservation's commitment to western science has at times been at odds with traditional ecological knowledge (TEK) (James, 2001), while recent studies show how TEK can increase biodiversity (Popkin, 2021). Language matters, too. For example, some words that have been routinely used in conservation for decades such as "wilderness" lack historical and cultural awareness (Gilio-Whitaker, 2019) and can limit what can be done in the field.

Within practitioner and funder organizations, structural barriers to inclusion need to be identified and removed. Barriers can include even routine processes such as how jobs and funding opportunities are described and where they are advertised. Engaging under-represented and historically marginalized communities requires that funders take risks by investing in small start-up organizations. Practitioners also need to take risks by sharing power and decision-making with impacted communities.

As practitioners and funders begin engaging with diverse communities, patient, active listening is necessary to understand of how communities work, what their challenges and goals are, what resources they need, and how best to support them. It is important to understand that sometimes a community's most pressing needs do not appear conservation related but are nonetheless essential to address trust, security, and other basic social needs that ultimately underpin conservation success (Madden & McQuinn, 2014).

2.6 | Support entrepreneurial spirit

Support entrepreneurial spirit refers to funders and practitioners taking risks, learning new tools, and evolving their theory of change for impact.

Natural, social, and economic systems are complex and rapidly changing. Conservation organizations need to keep pace with that change by experimenting with new approaches to achieve desired long-term impact (Chang, 2019). Stepping outside normal operating practices can be difficult because taking risks may lead to failure, and, for both practitioners and funders, failure carries stigma (Catalano et al., 2018) that can constrain future opportunity.

Acknowledging that failure constitutes an opportunity to learn is critical to long-term success (Guadagno et al., 2021), and learning from project failure is essential (Catalano et al., 2019). Funders may have greater tolerance for risk due to their financial self-sufficiency (Betsill et al., 2021) yet may be cautious about extending that tolerance to grantees if they do not have a long track record of success or if they are trying something new. Funders also need to recognize the hurdles to innovation and risk-taking nonprofits face. For example, foundations set standards for measurement and reporting that allow them to manage multiple grants at once, yet these standards may inhibit innovation by compelling all organizations to use similar approaches. Funders might consider how required reports and measures could incentivize entrepreneurial spirit and support practitioners in the face of failure.

Open conversations between funders and practitioners can allow entrepreneurial ideas to flourish. Through these conversations, funders and practitioners can jointly assess risk, dedicate time for learning and capacity building, and create expectations for "what if" scenarios with associated contingency plans. Multiple funding partners engaged in a project, or multiple practitioners in a funder's portfolio for a specific strategy objective, help build tolerance for risk, and spread the risk across organizations.

2.7 | Reduce burdens

Reduce burdens refers to simplifying grant applications and reporting.

The industry standard for grantmaking involves deep dives into organizational goals, outputs and outcomes, budgets, staffing, and overhead followed by reports submitted at specified intervals. Without a careful eye toward the time required and the value produced, each point in this cycle can burden both practitioners and funders, leaving less time for practitioners to pursue their programmatic goals (Dennis-Bishop, 2019) and less time for funders to invest in and understand their grantees.

The foremost approach to reducing burdens for both funders and practitioners is for funders to award multi-year grants, thereby reducing application and reporting demands while building long-term funder-practitioner relationships. Funders working on similar topics should consider creating a common grant application (Le, 2021) and reporting approaches, such as a list of acceptable metrics from which grantees can choose. Funders networks can be the venue where these common materials are developed and shared.

Examples of reducing grantmaking burdens have emerged from the COVID-19 pandemic. In early 2020, the Council on Foundations (2020) encouraged funders to sign onto a pledge to streamline grant-making. Grants are now being given "at record speed, with fewer conditions, and in greater collaboration with others" (Nowski et al., 2020).

While we suggest multi-year grants, fewer administrative demands, and great funding flexibility, we are aware that these require strong, trust-filled relationships. The need for these relationship points back to the importance of funders and practitioners collaborating closely and being intentional about growing and nurturing their relationships.

2.8 | Tell our story

Tell our story refers to engaging our communities, other stakeholders, and supporters by powerfully communicating what we are doing and why.

Stories can be powerful communication tools that increase comprehension, interest, and engagement among donors, volunteers, beneficiaries, and the public (Dahlstrom, 2014; Mitchell & Clark, 2021). Strong narratives can develop trust with an audience and increase the ability and willingness of audiences to learn and to take action (Sundin et al., 2018). In the process of telling our story, we can learn from our community. Storytelling is often not prioritized, resulting in insufficient time dedicated to communications. Even if there is time in our schedules, good storytelling is hard, particularly when technical subjects are essential elements of the story (Green et al., 2018).

Most conservation stories are complex; story telling is a way to make them appeal to the emotion that drives human behavior (Olson, 2018) in a way that does not gloss over important details and facts. These stories can be told in multiple forms, including in-person dialogues and presentations, articles and blogs on websites, webinars, electronic and print newsletters, and social media. Before crafting a story, define your audience and your medium, recognizing that different approaches require different elements and styles. For example, Fernández-Llamazares and Cabeza (2018) show that Indigenous storytelling can lead to enhanced understanding of diverse values and perceptions around biodiversity, while offering a constructive approach for greater inclusion of Indigenous peoples in conservation.

Learning how to tell a good story is a process (Green et al., 2018). Both funders and practitioners can benefit from learning the basic elements of storytelling so they can share a compelling narrative. To be most effective, organizations and collaborations should invest in a skilled communications person. Where possible, practitioners and funders should work together to tell their story to their supporters, their stakeholders, and their communities.

3 | CONCLUSION

While some of these best practices are not yet commonplace, they reflect extensive experience delivering on-the ground conservation outcomes. The COVID-19 pandemic has prompted numerous changes consistent with many of our best practices, and these changes have shown that the evolution we are encouraging is possible. Recent changes consistent with our best practices include investing more in general operating support, strengthening relationships, and loosening application and reporting requirements (McCormick, 2021). We encourage both funders and practitioners to pay attention to, cultivate, and collaborate on all eight practices so we can more effectively respond to the urgent need for collaborative conservation that serves nature and communities.

AUTHOR CONTRIBUTIONS

John Sanderson conceived of the workshop where the best practices were developed. Jessica Archibald contributed substantially to the design and implementation of the pre-workshop survey, analyzed responses, drafted the pre-workshop report on survey responses, and reviewed and edited the manuscript. John Sanderson and Heather Knight facilitated the workshop. All other authors attended the workshop, contributed substantially to the development of the best practices, and contributed to writing and editing of the manuscript.

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CONFLICTS OF INTERESTS

The authors declare no potential conflicts of interest.

DATA AVAILABILITY STATEMENT

Pre-workshop survey data and more details about the workshop are available in the Supporting Information.

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SUPPORTING INFORMATION

Additional supporting information can be found online in the Supporting Information section at the end of this article.

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