



THOMPSON-NICOLA CONSERVATION INITIATIVE
Lessons Learned from Nine Conservation Partnerships

Eclipse Environmental Consulting | **MARCH 2021**

Lessons Learned from Nine Conservation Partnerships

Thompson-Nicola Conservation Initiative

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Phase 1 research for the Thompson-Nicola Conservation Initiative was funded by:
Environment and Climate Change Canada: Canadian Wildlife Service
BC Ministry of Forests, Lands, Natural Resource Operations and Rural Development

Design: MAGPYE Productions

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Special thanks to the TNCI Working Group for guiding this research, and to all interviewees for their thoughtful ideas, suggestions and enthusiastic commitment to biodiversity conservation.

Front cover photo: Kamloops hoodoos, courtesy Grasslands Conservation Council of BC

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ACRONYMS

CDFCP	Coastal Douglas-fir Conservation Partnership
CVCP	Comox Valley Conservation Partnership
CWS	Canadian Wildlife Service
ECCC	Environment and Climate Change Canada
ENV	Ministry of Environment and Climate Change Strategy (BC)
FLNRORD	Ministry of Forests, Lands, Natural Resource Operations and Rural Development (BC)
GOERT	Garry Oak Ecosystem Recovery Team
KCP	Kootenay Conservation Program
NGO(s)	Non-governmental Organization(s)
OCCP	Okanagan Collaborative Conservation Program
SAR	Species at Risk
SARA	Federal Species at Risk Act
SCCP	South Coast Conservation Program
SEAR	Species and Ecosystems at Risk
SOSCP	South Okanagan Similkameen Conservation Program
TNCI	Thompson-Nicola Conservation Initiative
TNRD	Thompson-Nicola Regional District
UBC	University of British Columbia
UBCO	University of British Columbia Okanagan

Executive Summary

Environment and Climate Change Canada (ECCC) has identified 11 [Priority Places](#) for biodiversity conservation in Canada, including the BC Dry Interior. The Thompson-Nicola (T-N) region of BC comprises 45% of the Dry Interior and contains high provincially, nationally and globally significant biodiversity values, including species and ecosystems at risk.

The BC Ministry of Forests, Lands, Natural Resource Operations and Rural Development (FLNRORD) initiated the **Thompson-Nicola Conservation Initiative** (TNCI) in March 2020 *to explore options for greater support for, and collaboration among, groups doing conservation work in the Thompson-Nicola region*, including the possibility of a regional conservation partnership (CP), similar to others in BC.

TNCI Phase 1 research, directed by an ad hoc Working Group, resulted in three reports: *Lessons Learned: Nine Conservation Partnerships* (Abs 2021) (this report); *Conservation Status of Species and Ecosystems* (Dyer 2021); and *Situation Analysis, Collaborative Conservation Opportunities in the Thompson-Nicola* (Abs 2021). Organizations in the region can use

this work to identify next steps in establishing a regional conservation partnership. The reports may also interest other conservation organizations.

Lessons Learned is based on interviews with these nine BC conservation partnerships (CPs), who were asked about their experience and advice on effective collaboration: [Coastal Douglas-fir Conservation Partnership](#) (CDFCP), [Comox Valley Conservation Partnership](#) (CVCP); [Garry Oak Ecosystem Recovery Team](#) (GOERT); [Kootenay Conservation Program](#) (KCP); [Okanagan Collaborative Conservation Program](#) (OCCP); [South Okanagan Similkameen Conservation Program](#) (SOSCP); [South Coast Conservation Program](#) (SCCP); [Multisar: Multiple Species at Risk](#); and [Partners in Flight](#) (BC and Yukon).

Benefits of collaborative conservation included increased communication, networking and information-sharing; taking a regional perspective on priorities and gaps and how to address them; more effective and efficient conservation efforts/reduced duplication; shared funding, administration and human resources; capacity-building for partners; and greater public and political support for conservation.

Governance

Partnership structure. CPs use various governance models, but most are two-tiered, with a steering committee/leadership group and a partner/member level that meets annually. Partners may form actions teams focused on topics such as securement, science, stewardship or land use planning. In large regions, sub-regional groups may focus on a specific watershed or valley.

Adopting an informal collaboration model is preferred to becoming a registered non-profit, to allow more flexibility in structure, programs and administration. Other tips: Identify committed leaders and champions

to drive the organization early on, but rotate leadership eventually to engage more partners, bring in new ideas, and share responsibility. Learn from other CPs, but design a structure, goals and programs that fit the regional context. Offer participation options to accommodate diverse group sizes, types and interests. Build the partnership over time.

Membership/partners. A key strength of a partnership is the diversity of participants, perspectives and expertise brought to the table; try to involve a range of groups while keeping a clear, strategic focus. Key members include government agencies with conservation mandates,

Indigenous organizations, funders, universities, conservation NGOs, and fish and wildlife and naturalist groups. CPs have also found value in involving other groups whose actions affect biodiversity, such as Crown land managers and tenure-holders, local governments, industry/sectoral organizations, landowners, recreationists and community organizations. Other tips: Ask members to identify what they will bring to the partnership. Build working relationships through collaborative programs and projects. Ensure scientific and technical support through linking with academics, other researchers and knowledge-holders.

Role of government bodies. CPs are positioned as member-driven and independent of government, yet Indigenous, senior and local government participation is seen as essential for success due to their legal and jurisdictional rights and mandates. Benefits include mobilizing complementary expertise and resources to strengthen government programs, and combining Western science, Indigenous Knowledge and local knowledge. It is helpful to secure support for the CP from leaders, elected officials and senior managers, and to clarify the roles of statutory decision-makers and technical staff.

All CPs are committed to respecting Indigenous Title and Rights and supporting meaningful Indigenous involvement. Indigenous participation has varied across CPs due to competing priorities and capacity issues; early involvement, capacity-building and support are seen as key.

Setting a direction for the CP. The organizational vision, mission, goals and collaboration guidelines (or similar) are set out in a charter, memorandum of understanding (MOU), statement of cooperation, or terms of reference. Some CPs also prepare a *strategic plan or lists of strategic priorities* to guide programs and activities over a defined time period. Accountability frameworks, used to identify and report on results, are useful for internal planning and to demonstrate value to funders.

Organizational management. A successful CP needs solid organizational capacity among the staff/contractors, steering committee and team leaders. This includes skills in program

planning, administration, financial management, proposal-writing and reporting, teamwork and event planning.

A capable full-time coordinator or program manager is seen as essential: to be a secretariat to the steering committee, coordinate partner activities, facilitate team, member and external communication, and provide accountability and continuity. However, the CP should find ways to keep the steering committee and partners actively involved in order to avoid over-reliance on one person.

Communication. Tips on *internal communication* include: Define communication and collaboration processes early on and revisit at intervals. In-person annual general meetings, steering and action team meetings facilitate networking and cooperation. Field visits, tours, demonstrations and field projects are productive and motivational for partners. A well-maintained website and member updates, through newsletters, email and social media, help to maintain the partnership.

Effective *external communication* will create a strong CP profile and reputation – among funders, elected officials, the public and the media – as a credible, neutral, multi-party body that produces clear conservation results. Key elements might include a logo, brand and key messages based on the agreed vision and goals; an external newsletter and social media updates; and an engaging website with resources for various audiences, e.g., fact sheets, technical guides and tool kits.

Scientific foundations. All CPs have done technical work to identify science-based critical conservation needs and design programs and projects to address them. Some have developed a *regional conservation strategy*, including a biodiversity analysis and mapping, and proposed conservation priorities, strategies and actions. To make the best use of resources, scientific work should focus on defined data gaps and identified user needs, and used as the basis for developing practical conservation tools and guidance for government, community and private decision-makers.

Funding. Securing funding, especially for coordination and administration tasks, is a persistent challenge. However, CPs have found that innovative

collaborations and projects often attract funding. Other tips: Have committed, connected champions on the steering committee. Ask partners to commit to even small amounts of funding and in-kind support. Develop cost-sharing and fee-for-service models for products, services and events. Seek in-kind contributions from government and business.

Involve universities with access to research funds. Work with willing local governments to create a **Local Conservation Fund**, based on a regional district or municipal levy, (e.g., a parcel fee), to support community projects. (See guidance and BC case studies at [Conservation Fund Guide for BC](#).)

Successful Program Areas

General approach to programming. Most CPs support a mix of regional, sub-regional and local scale programs and projects. Regional initiatives might include a regional conservation plan or securement strategy, while a sub-regional project might focus on a specific watershed or valley. Local, often field-based projects, e.g., stewardship or restoration, are largely implemented by member groups. Many CPs have increased their scale and reach over time, but suggest starting out “slow and small” with easy-to-deliver collaborative projects that will build relationships, demonstrate success, and attract partners and funders. Typical CP program areas include:

Securement. Coordinating strategies to prioritize, identify and secure conservation lands in the region has been a successful program area. Some CPs have a securement team consisting of groups involved in acquisition and/or management of conservation lands, while others work informally.

Stewardship. Since many species and ecosystems at risk are found on private land, and land values often preclude purchase, most CPs support stewardship programs for ranchers, farmers, homeowners and/or families. Member cooperation helps to avoid duplication and increase effectiveness. CPs have also worked to harmonize stewardship activities, (e.g., data collection, monitoring, best management practices), across land tenures and management regimes, including Crown land, protected area and private land.

Working with local government. CPs have found a key role in helping regional and local governments better address conservation in land use planning and regulation. Typically, they provide data, mapping and guidance on protecting species and ecosystems at risk, sensitive habitats and wildlife corridors. Some also offer tools and technical support to integrate biodiversity values into regional plans and growth strategies, Official Community Plans, zoning bylaws, and park and greenspace planning.

Community education and engagement. All CPs do public outreach, often as part of other programs. This might include promoting community awareness, education and participation, for example, in data collection and field monitoring (i.e., citizen science), habitat restoration or enhancement.

Conclusions. Collaborative conservation partnerships have a proven record in facilitating strong programs that significantly benefit biodiversity conservation. While they have chosen various governance arrangements, goals and programming strategies, their collective experience, lessons learned and advice will undoubtedly be helpful and inspiring for the TNCI and other conservation partnerships. Thanks go out to all interviewees for their time and valuable suggestions.



CARIBOU HERD

Photo courtesy Bevan Ernst

1 Introduction

1.1 THOMPSON-NICOLA CONSERVATION INITIATIVE

As part of the [Pan-Canadian approach to transforming Species at Risk conservation in Canada](#), Environment and Climate Change Canada (ECCC) identified 11 [Priority Places](#) for biodiversity conservation in Canada, including the BC Dry Interior. The Thompson-Nicola (T-N) region makes up 45% of the Dry Interior in Canada and contains high numbers of provincially, nationally and globally significant biodiversity values, including many species and ecosystems at risk (SEAR) (Dyer 2020). The region also has key wildlife and plant corridors along the rivers and valleys connecting the region to the South Coast, Cariboo and Okanagan.

Recognizing the need to strengthen regional conservation efforts, the BC Ministry of Forests, Lands, Natural Resource Operations and Rural Development (FLNRORD) secured 2019-2020 Priority Places funding for the “Thompson-Nicola Conservation Initiative” (TNCI). Its aim is to explore options for greater support for, and collaboration among, groups doing conservation work in the region. For the purposes of this work, the T-N is defined by the boundaries of the Thompson-Nicola Regional District, as this boundary captures the geographical area of interest.

In March 2020, an ad hoc Working Group was formed with members from government and non-government organizations interested in the idea of establishing a multi-party collaborative conservation program, similar to those found in other regions of BC. This group supervised the TNCI Phase 1 research, conducted by independent consultants, and focused on three goals, with a report for each, as follows:

1. Summarize information on ecosystems and species at risk (Dyer, O. 2020. *Conservation Status of Species and Ecosystems in the Thompson-Nicola Region*).

2. Analyze lessons learned and best practices from other conservation partnerships. (Abs, S. 2021. *TNCI: Lessons Learned from Nine Conservation Partnerships*) (aka *Lessons Learned*, this document).

3. Assess the conservation situation in the region, including priorities and options for greater collaboration (Abs, S. 2021. *TNCI: Current Conservation Situation and Collaboration Opportunities*).

This Phase 1 work can be used by organizations working in conservation in the Thompson-Nicola as the basis for identifying next steps in creating the partnership. It is also hoped that this *Lessons Learned* report will be helpful to other conservation collaboratives.

1.2 LESSONS LEARNED: RESEARCH METHODS

Ten interviews were conducted by Zoom videoconference or telephone with coordinators and executive directors of nine conservation partnerships (CPs). Participants were asked about their experience, lessons learned and advice for a new conservation initiative in the Thompson-Nicola under the following topics:

- benefits of partnership
- governance and membership
- goal-setting
- communication and collaboration
- strategic planning and regional conservation strategies
- science and technical aspects
- administration and funding
- programs and projects

Box 1.1 lists the conservation partnerships interviewed and their acronyms, as used in this report. Profound thanks go out to all interviewees for their time and valuable suggestions. Their rich experience and insights will provide Thompson-Nicola organizations with diverse options to consider and, hopefully, with inspiration and motivation to create a new regional partnership.

Note: The rest of the report summarizes the views of interviewees and not of the TNCI Working Group or consultant. The report is structured around the interview questions, with each section having four elements:

- key observations or conclusions **in bold**
- one or more paragraphs of explanation
- **case examples** (in boxes)
- sample comments that illustrate the observations *in italics*

BOX 1.1 CONSERVATION PARTNERSHIPS INTERVIEWED FOR THIS REPORT

Note on terminology: Regional partnerships have various names, e.g., “program”, “partnership” or “team”, and participating organizations are called “members” or “partners”. For simplicity, this report refers to all of them as “conservation partnerships” or “CPs”.

1. [Coastal Douglas-Fir Conservation Partnership](#) (CDFCP)
2. [Comox Valley Conservation Partnership](#) (CVCP)
3. [Garry Oak Ecosystem Recovery Team](#) (GOERT)
4. [Kootenay Conservation Program](#) (KCP)
5. [Okanagan Collaborative Conservation Program](#) (OCCP)
6. [South Okanagan Similkameen Conservation Program](#) (SOSCP)
7. [South Coast Conservation Program](#) (SCCP)
8. [Multisar](#): Multiple Species at Risk aims to “conserve species at risk through habitat stewardship, while maintaining viable ranching operations in Alberta’s native grasslands”.
9. [Partners in Flight](#) (BC and Yukon): focus on multi-jurisdictional collaboration on grasslands, riparian zones and low-elevation mature forests, especially bird habitats facing urgent threats.



Big Horn Sheep,
Veer



ABOVE FRASER RIVER AT BIG BAR

Photo, top: courtesy Nature Conservancy of Canada;
below: Peregrine Falcon, Shutterstock

2 Proven Benefits of Collaboration

While CPs vary considerably in their structure and focus, they have several common characteristics:

- **Most were formed in response to mounting threats to biodiversity in a specific region**, especially where species and ecosystems at risk (SEAR) were being threatened by expanding and/or poorly managed human activities, combined with a realization that increased regional collaboration could provide benefits for conservation.
- **Many started up in the mid 2000s** after the federal *Species at Risk Act* (SARA) was passed in 2002 and species at risk (SAR) recovery planning was ramping up.

- **Many are in regions with a high proportion of private vs. Crown land** (as is the case in the Thompson-Nicola), thus leaving a conservation gap where senior governments (federal and provincial) have limited jurisdiction. CPs have often helped to address that gap through stewardship work with private landowners and working with local governments to integrate conservation into their planning and development work.



CPs provided numerous examples of conservation benefits and successes resulting from collaboration. They include the following (roughly in order of frequency of mention), with sample comments:

- **Communication and networking:** information-sharing, exchange and dialogue among partners – *Get to know each other. Build trust. Bring people working in isolation together.*
- **Identifying gaps in conservation efforts** that could best be served by a partnership.
- **Greater effectiveness and efficiency:** harmonize efforts, avoid duplication, (e.g., programs focused on the same target groups), and use limited resources efficiently. *We get more done.*
- **Cooperation and partnerships on specific strategies, programs and projects:** pool complementary expertise and resources and form innovative partnerships. *We now have more and better projects through identifying similar goals and finding synergies.*
- **Reduced competition** for funding, profile and/or influence.
- **Data and information-sharing:** share knowledge among partners, and provide scientific and technical support to external bodies, e.g., government, industry, communities.
- **Harmonization of efforts to secure conservation lands,** especially among government and non-government entities, such as land conservancies.
- **Taking a regional perspective on conservation,** situated mid-way between a local and provincial view: *The advantage of a CP is that we work at the landscape level.* Also, devising regional plans and strategies and seeing how local projects contribute to broader regional goals. *The partnership raises the profile of member groups' conservation work.*
- **Shared administrative resources:** share offices, equipment, coordination and financial services.

- **Shared human resources:** engage and mobilize a range of staff, volunteers and outside experts.
- **Collaborative fund-raising strategies and shared funding.** *Partnerships appeal to funders.*
- **Capacity-building for partners/members** on technical, organizational and collaboration skills and through peer learning and sharing best practices.
- **Increased public profile for conservation** leading to greater public awareness, education, support for, and participation in conservation efforts.
- **Collective influence and a stronger voice** for changes to government policies and programs and private sector practices.



The Burrowing Owl is listed as Endangered in Canada and Red-listed in BC.
Photo courtesy John Surgenor

BOX 2.1 CASE EXAMPLES: HOW CONSERVATION PARTNERSHIPS GOT STARTED

KCP was formed in the East Kootenay in 2002 (West Kootenay was added in 2012) after a period of rapid land development in the late 1990s, e.g., golf courses, housing, in response to community concerns about losing open space, large farms, fish, wildlife and water quality.

OCCP was established in 2007 to address multi-jurisdictional conservation issues in the Central and North Okanagan. Early projects provided mapping, research and best practices for integrating conservation into land use planning. OCCP continues today as an information hub but has expanded its role to facilitate conservation initiatives with its partners.

SCCP was established in 2006 during the era of single-species SAR Recovery Plans, when multiple teams were working independently but often with overlapping members (e.g., Canadian Wildlife Service (CWS), Ministry of Environment,

universities and Ducks Unlimited). SCCP helped to integrate these efforts, establish Action Groups, and address “orphan” and “under-the-radar species” left out of plans. Senior governments found value in funding SCCP as a SAR-focused entity.

SOSCP drew on previous science-based conservation analyses and collaboration to formalize a partnership with 15 senior government agencies, large conservation groups and smaller local partners in 2001. Key factors in its creation were rapid urban expansion; rural development, including intensive agricultural development; the incoming SARA; and a growing need for coordinated regional conservation.

Multisar was established in 2002 to provide a single conservation contact organization for farm producers who at times had several different groups asking them to join in conservation efforts for the same species, (e.g., owl, toad), and/or ecosystems.



Cattle drive, Lac du Bois
Photo courtesy Bob Sheer



SUMMER STORM CLOUDS OVER LAC DU BOIS GRASSLANDS PROTECTED AREA

Photo courtesy Mandy Ross

3 Governance Options

3.1 PARTNERSHIP STRUCTURE

CPs use various governance structure, but most are two-tiered, with a high-level management body (steering committee or similar) and a membership level, which meets annually and works during the year in smaller teams of members interested in specific topics or programs.

CP suggestions on partnership structure include:

Organize into committees, action teams or working groups on topics such as securement, science, stewardship, restoration and education. These may be standing committees or be reorganized each year. Some CPs use short-term committees to address specific topics for a limited time.

CASE EXAMPLE:

Partners sign on to OCCP each year to form Action Teams for specific funded projects, with set timelines and budgets – an approach which *draws on a changing pool of people and resources rather than relying on the same people to move things forward all the time.*

Aim for a consistent steering committee, especially in the beginning, to provide leadership and continuity, but rotate members eventually to keep more partners engaged, bring in new ideas and spread the responsibility and work among partners. *Learn from, but don't copy other partnerships. Design the governance, goals and programs to fit the regional context, needs and priorities. Have a steering or governance committee build the partnership together over time.*

Consider having several levels and types of participation to respond to the needs and capacities of diverse group sizes, types and interests, e.g., steering committee, technical committee, action teams, science advisors. *Have something for everyone; groups and people will bite off the pieces that interest them.*

Consider forming sub-regional teams or committees to address issues in specific geographical areas, such as a watershed, sub-basin or valley.

CASE EXAMPLE:

KCP has structured its program through “**conservation neighbourhoods**”, which allow groups to collaborate on priority topics within a specific sub-region.

All CPs recommended using an informal collaboration model rather than becoming a registered non-profit with a board of directors. This allows more flexibility in structure and programs and avoids the formal administrative responsibilities of being a registered non-profit.

CPs are organized with various degrees of formality. For example, one CP calls itself a “loose partnership” of groups cooperating but largely working on their own projects, while others define member expectations in a charter, Memorandum of Understanding) MOU or Terms of Reference. The key is to find a model that allows a range of government and non-government organizations, including Indigenous ones, to work together, separate from other formal arrangements such as government-to-government (G2G) agreements. All CPs also have a relationship with a financial entity, e.g., a foundation or trust, that serves as a fiscal sponsor to manage funding.



Swan counters
Photo courtesy Rick Howie

3.2 MEMBERSHIP/PARTNERS

CPs identified several strategies to attract and retain a range of members over time, as follows:

Include diverse members: *cast a wide net.*

Since a key strength of a CP is its breadth and diversity of participants, membership should be as inclusive as possible of all sectors and groups with a role in conservation, while still maintaining a clear strategic focus. Obvious and necessary partners include conservation non-governmental organisations (NGOs) and trusts, naturalist and hiking groups, and government agencies with conservation mandates. But CPs should also aim to involve other parties whose decisions and actions affect biodiversity and could help to conserve it, such as:

- Crown land managers, tenure-holders and users
- industry sectors and associations, e.g., ranching, farming, forestry, mining
- motorized and non-motorized recreationists
- local government, including regional district and municipalities
- community organizations, e.g., local residents' associations, Chambers of Commerce, service groups, Farmers Institute, 4-H

Be inclusive but efficient. Address gaps and duplication. Get everyone in the room so you know who's doing what.

Get local government land managers and industry involved early to promote sustainable practices.

Provide space for people to share perspectives. Seek diverse views by inviting guest speakers from science, community and industry. Look at economic and social aspects of biodiversity.

Cultivate strong leadership to drive the organization, especially at the start; identify and find ways to retain enthusiastic champions from across sectors. *Find some heavy lifters that will stick with it.*

CPs noted that key natural leaders will champion the partnership in the early days and over time. One interviewee cited social science research that has shown the crucial role of individual champions in driving a successful collaboration.

Create numerous and diverse opportunities to build relationships and working collaborations.

Finding ways for members to continue to meet and to work together is seen as fundamental to creating and maintain the partnership. *It's important to communicate, e.g., have small table discussions where overlapping interests and new ideas can come out.*

Communicate internally and externally that the CP is member-led and driven, and independent of government, although government agencies may sit as members.

While all partnerships include and/or work closely with government organizations, including Indigenous organizations, CPs note that a central factor in their success is being seen as independent from – yet collaborative with – key government bodies. Positioning the CP as neutral, multi-party and grassroots-led provides credibility, attracts broad membership and appeals to funders.

Ensure strong scientific and technical support for the partnership.

Provide a strong technical foundation for programs by involving government, Indigenous, NGO and academic experts and knowledge-holders. This can be done through a technical or science advisory committee, science action team and/or steering committee composition. Valuable expertise includes biology, ecology, conservation, Indigenous Knowledge, land securement, land use planning and management, communication and education.

Engage and develop strong ties with universities in the region and elsewhere.

Universities and high schools can be a rich source of research opportunities, academic expertise and grad, undergrad and post-secondary student volunteers. For example, OCCP and SOSCP work with the [UBC-Okanagan Biodiversity Institute](#): We were amazed to involve 15-20 professors from UBCO. Lots of faculty are looking for data, research and community engagement opportunities. Several Thompson Rivers University faculty are interested in working with the TNCI, should it proceed.

Have members identify *what they can bring to the partnership to create synergies and benefit the big picture.*

Asking partners to think about how they can contribute to collaboration and how they might benefit helps to build commitment, e.g., can they sit on the steering committee and action teams; supply reports, data and expertise; and/or provide in-kind resources such as staff time, office space, computers or equipment? (Note: The *TNCI Situation Analysis* summarizes Thompson-Nicola interviewee responses on this topic.)



Ken and Peter with Western Screech Owl nest box
Photo courtesy Rick Howie

3.3 COMMUNICATION AND COLLABORATION PROCESSES

INTERNAL COMMUNICATION AND COLLABORATION

CPs evolve over time and activity ebbs and flows, based on funding availability; changing government policy and planning frameworks; emerging conservation priorities; and leadership, member and staff turnover. To maintain continuity and keep a large and diverse membership engaged, the CP should agree on communication and collaboration processes early on, and revisit and refine them over time.

Year-round communication can include a well-maintained website and member updates through newsletters, email blasts and/or social media.

Transparent, inclusive communication is essential, e.g., open meetings, posting updates online.

We work on draft Google docs together, sharing ideas.

For our members, websites are secondary to newsletters.

All CPs said that face-to-face (F2F) meetings, such as annual general meetings, steering committee and action team meetings, are essential to a healthy partnership. Field visits, tours, demonstrations and field projects are also highly motivational and productive for members.

Annual General Meetings (AGMs) build relationships, promote networking and reinforce a regional perspective. Partners have the opportunity to reconfirm their commitments, decide new directions, learn from each other, and hatch new collaborations and projects. CPs keep AGMs and meetings engaging in various ways, such as:

- incorporating a field experience
- including a learning component, e.g., film, speaker or panel
- using interactive and mixer activities, e.g., experience-sharing sessions
- engaging a facilitator or graphic facilitator

- inviting external partners and the public to some sessions to involve the broader community

Face-to-Face (F2F) is very helpful whether in the field or the boardroom.

We've had face-to-face meetings twice a year for 30 years; it keeps us consistent and relevant.

Although an AGM is challenging with our large numbers, ours were key in the early years to build a community and "culture". Over time, they helped us maintain and recalibrate the partnership.

Make it fun: we meet in cool places with good birding.

Our annual meetings, involving members, external agencies and the public, helped us keep a profile and show our value even when the partnership wasn't very active due to funding downturns.

CASE EXAMPLE: PARTNER ENGAGEMENT – KOOTENAY CONSERVATION PROGRAM

KCP conducts an Annual Partner Survey using Survey Monkey to learn about and stay responsive to partner needs and interests.

The KCP Stewardship Committee runs popular spring tours, primarily for representatives from KCP partner organizations.

The annual Fall Gathering is designed to be fun, strategic and informative, e.g., using a "conservation café" to discuss key topics, field visits to on-the-ground projects, and presentations on timely topics. There is also a Friday noon banquet and Conservation Leadership Awards presentation.

CPs said that a partnership depends heavily on good organizational and management capacity to succeed. This includes having – among staff, members or external experts – skills in teamwork, work planning and accountability, project management and reporting, and event management, e.g., agenda creation, chairing, facilitating for meetings and workshops.

Strong communication capacity is needed for outreach to members, the public and the media, including social media, along with administrative and logistical support, e.g., internet and other tech support, note-taking, record-keeping and financial management.

CPs noted the value of capacity-building for steering committee members, partners and staff on both conservation topics and organizational management. Skills can be built through peer learning and experience-sharing within the CP and with other CPs, e.g., some CP coordinators meet annually for peer learning and exchange.

Even with the best of work plans and good intentions, program implementation can be hampered when partners don't meet their stated commitments: *Everyone is busy*. Suggestions to address this include: *build slowly; be realistic and don't overreach; pick what's doable; use work plans and accountability systems (e.g., coordinator and team leader check-ins); and keep monitoring activities to see if they're still of value to members*, e.g., KCP asks about partner priorities in an annual survey.

CP staff and/or contractors are essential to drive each project forward.

Build partner capacity to collaborate among those whose interests and views may differ.

Find ways for all parties to speak their mind without anyone dominating; use interactive activities.

Ensure a business-like, professional and collaborative attitude that is not disrespectful or confrontational.

EXTERNAL COMMUNICATION

CPs emphasized the importance of creating a strong public profile and reputation as a credible, neutral regional partnership of diverse groups that can produce conservation results. This will attract members and funders and build support from the community and elected officials.

Some CPs design a formal external communication strategy, with goals, target groups and messages for the partnership or specific programs. Even without such a strategy, CPs may adopt a name, logo, brand and key messages, based on their agreed vision and goals. Some CPs produce an external newsletter. Key to outreach is having an engaging, up-to-date website, describing the organization and providing resources for various audiences, e.g., program outlines, fact sheets, technical guides and tool kits. One CP said maintaining its website helped it keep an organizational presence for partners and the public even when programming ebbed from lack of funding.

Crediting the partnership with successful programs and projects maintains its profile and helps to ensure continued support from the community, elected officials and funders. This can be challenging if a project is delivered by only one or a few member groups who *may try to take sole credit for success*. Governance protocols can be used to specify how results will be reported, positioned and credited in external communication.

Show on-the-ground conservation successes that people can see have resulted from collaboration.

Every year I look for a glossy, on-the-ground project.

People want to see "before and after" results, for example, changes in policy and regulations.

Develop common messages so that partners consistently convey what the collaborative is for, its value, and how to get involved, especially when communicating with elected officials.

3.4 ROLE OF GOVERNMENT IN CONSERVATION PARTNERSHIPS

All CPs stressed the importance of working with Indigenous, senior and local governments, citing the many conservation benefits that have resulted from collaboration among government, non-government and community organizations.

Benefits of effective government participation include:

- Coordinate conservation efforts across diverse land tenures and among various public and private land managers.
- Combine Western science, Indigenous Knowledge and local knowledge, technical expertise and field experience.
- Encourage stronger government leadership and engagement in conservation.
- Take advantage of complementary roles, capacities and resources.

For example, senior government agencies have legal mandates and powers and may be able to offer technical support and in-kind resources such as staff time, offices and equipment. Community groups often bring local knowledge, volunteers and commitment, while NGOs, land trusts and universities bring funding, expertise and data, and often have more flexibility than government.

CASE EXAMPLE:

CDFCP succeeded in getting the Provincial Government to change Crown land policies so that conservation could be determined as the “highest and best purpose” for some areas and change the *Land Act: Land Use Objectives Regulation Order* to allow protection for ecological communities, leading to over 30 new coastal protected areas, e.g., Wildlife Management Areas and parks.

Having government technical staff, working with ecologists and biologists from outside organizations often makes the staff and their senior managers more aware of the issues.

We’ve had valuable results from collaboration, for example, devising management agreements between government and a nature trust or NGO to both secure and manage conservation lands.

We can often do what government can’t because we understand their thinking and decision-making.

The role of government agencies in CP governance varies considerably across CPs and often changes over time. Most, but not all, steering committees have representation from agencies with conservation mandates, e.g., FLNRORD, ECCC-CWS, and ENV, and from regional and local governments. Some CPs don’t have government members but liaise closely with government agencies.



Badgers are endangered in BC, with a remaining population of around 300. Photo courtesy John Surgenor

CASE EXAMPLES:

- CVCP is a forum of 24 community groups created to promote local government conservation efforts but do not have government “at the table”. The group serves as a single point of contact for local governments and developers and can coordinate internally which of the 24 groups are most relevant to participate in a specific initiative. CVCP members also sit on local government advisory committees and send delegations to the regional district council and staff, for example, to promote inclusion of conservation in the Regional Growth Strategy, OCPs and zoning regulation. *Whoever sits on advisory committees or appears as a delegation speaks for all member groups, which together represent 15% of the local population and probably 30% of voters.*
- OCCP worked early on with the Okanagan Nation Alliance on all projects. They identified common goals, interests and possible synergies, and how their roles could be complementary. For example, while NGOs have good working relationships with local governments, Indigenous groups may bring a stronger position to discussions with senior governments.
- The SCCP Advisory Committee, which includes funders, external partners and government reps, meets a few times a year and is consulted on programs by email. Some senior government managers on this body liaise directly with decision-makers (e.g. directors and assistant deputy ministers) who also occasionally attend meetings.

Securing participation by the provincial government – especially FLNRORD and ENV – in regional conservation efforts has been a significant and consistent challenge for CPs.

Most CPs perceive that conservation efforts have been hampered to some degree by FLNRORD’s multiple and often competing Crown land management mandates. Its various departments manage tenures and permits for forestry, rangeland, mining and resource roads as well as Crown land residential and recreational subdivision, recreation management and biodiversity conservation, including SEAR and conservation lands. CPs listed the following specific concerns:

- It has often been hard to get FLNRORD staff engagement, financial and technical support.
- Several CPs sense a lack of support for conservation among senior provincial managers.
- Several CPs and trusts have met barriers in getting provincial permits, e.g., water permits, for conservation projects and would like to see a more collaborative approach.
- Recreation Sites and Trails BC facilitates off-road vehicle use, which can negatively impact species and habitats, if poorly managed.

Interviewees suggested that FLNRORD participation may be complicated by:

- the large size of the ministry and lack of communication and coordination across departments
- the lack of current land use planning at watershed and regional levels (Land and Resource Management Plans or LRMPs from the 1990s are out-of-date and/or not used)
- staff retirements and turnover, and the many new personnel has meant a loss of continuity and corporate memory.

Several CPs suggested that ENV participation has been weakened by staff and funding shortages, e.g., Water Stewardship Branch, BC Parks, Conservation Officer Service and Environmental Assessment Office, limiting their ability to meet their mandates and to liaise with FLNRORD Crown land managers.

Sometimes we can't get even Provincial representation at annual meeting and planning sessions.

Crown land managers often paint us with the same brush as developers but our intent is positive.

We feel the Province is dragging its heels on good project proposals. We wonder when they're going to partner with conservation groups instead.

CPs offered the following suggestions to promote effective government participation:

- Ensure that regional managers and key staff from all relevant agencies are aware of the partnership, even directly involved, if possible. If possible, clarify the relative roles of statutory decision-makers, managers and technical staff, and how and to involve them.
- Build and maintain a strong public profile and reach out directly to elected officials and senior managers to secure their support for agency participation. *Toot your own horn.*
- Seek federal and provincial in-kind support and funding for the CP. *Look for a formal commitment. Make it a priority for staff – make it someone's job.*

All CPs interviewed are committed to respecting Indigenous Title and Rights and to meaningful Indigenous involvement in conservation efforts. All have invited participation from Indigenous governments and organizations in their respective regions, although engagement has varied.

CPs said that it has often been challenging to secure meaningful Indigenous involvement due to various factors, such as difficulty in separating technical and political issues; the preference of some groups to work within a Government to Government (G2G) framework; limited capacity to participate due to other pressing issues and a lack of resources; and turnover among Indigenous representatives. Early involvement in a new CP may alleviate some of these issues.



Bat box
Photo courtesy Okanagan Habitat Atlas

3.5 SETTING A DIRECTION FOR WORKING TOGETHER

All CPs emphasized the importance of developing a common vision, goals and collaboration guidelines, i.e., *how we're organized and how we're going to work together*. These can be set out in a charter, memorandum of understanding (MOU), statement of cooperation or terms of reference that partners sign on to, supplemented with communications protocols or similar.

It can be helpful in the early days to collaborate on a specific project or program, especially a field-oriented activity. This allows partners to get to know each other at both organizational and individual levels, build on success and refine initial working arrangements, as needed.

Interviewees said these early steps are important to:

- identify common needs and priorities
- ensure a common internal understanding of the nature of the partnership, its goals and scope
- help partners understand their roles and commitments, and identify opportunities
- identify decision-making (usually consensus), accountability and communication processes
- anticipate and address possible issues and challenges
- provide the basis for consistent external messaging, in order to attract members and communicate with the public, elected officials, funders and external organizations.

Build the partnership step-by-step, allowing time for groups get to know each other and build trust.

Think long-term about the format, goals and expected outcomes; True change doesn't happen overnight; it may be a decade.

Set the tone from the start that it's collaborative – we all want biodiversity values protected, even if we have different views. That leads to success!

Choose several focal areas, then pick a few things and do them well.

CASE EXAMPLE

The CDFCP Steering Committee formed “organically” from interested participants attending a workshop. Partners initially signed on to a “loose structure”, defined by a *Statement of Cooperation and Terms of Reference*, then further shaped the collaborative over the first 1-2 years, with additional partners joining over time.

Many CPs find it an ongoing challenge to keep finding common ground and move in a common direction, given their diverse membership. Yet conservation efforts are often strengthened by the breadth of participants and depth of discussion.

CPs identified several ongoing challenges to collaboration, including:

- diverse group interests, perspectives, priorities and geographic scopes
- differing interpretations of partnership governance and goals. *Each puts a different spin on it.*
- divergent views on conservation issues and approaches
- real or perceived competition for funding, profile, influence and/or target groups, often as a result of the scarcity of resources for conservation, i.e., funding, data, people.

They made several suggestions to build and maintain cohesion, including:

- Communicate and reinforce the benefits of collaboration, as summarized in this report and the *TNCI Situation Analysis* (2020) and through networking with other CPs.

- Collectively define the initial vision and goals, and revisit, revise and recommit to them at intervals. *Creatively address competition and creative tension by having groups regularly discuss strategic priorities.*
- *Identify and use the complementary ideas, skills and resources offered by each group and create innovative collaborations.*

3.6 STRATEGIC PLANNING AND REGIONAL CONSERVATION STRATEGIES

Most CPs conduct some form of strategic planning to focus their efforts over a specific time frame, e.g., 2-5 years. This may involve devising a list of strategic priorities or a strategic plan with goals, strategies, actions and accountabilities. This may be done at the AGM/ annual partner meeting and may involve contracted expertise.

CPs noted that strategic planning helps to provide a time-limited regional framework for programs, projects and activities; supports a focus on measurable results; and prevents *scope creep and getting stretched*.

You can do visioning and planning while still keeping flexibility to evolve. Keep asking “is this needed?” Information drives what we will do and how we will resource it.

It’s essential to get buy-in on any plan or strategy from all stakeholders, including Crown land senior managers, technical staff and user groups.

Be surgical in focusing on priorities.

CASE EXAMPLES:

- CVCP has identified “areas of strategic focus”, current local government policies and regulations, urban forestry and integrated water management.
- The CDFCP [Conservation Strategy](#) guides its programs, with a focus on the dual goals of securing additional protected ecosystems and ecosystem management through working in three areas: science, education and outreach, and partnerships.
- KCP identifies “[Strategic Priorities](#)” (*broad buckets*) every 3 – 5 years by reviewing past priorities and programs and partner surveys. Multisar develops five-year strategic plans linked to evolving government programs and needs.
- OCCP has a strategic planning session every few years to identify three top priorities.
- SOSCP started with a prospectus, business plan and strategic plans and developed a [Biodiversity Conservation Strategy](#) in 2012. It has restructured its Program Charter and Executive Manual, as needed, as the partnership evolved.

Some CPs have developed regional conservation strategies that include biophysical analysis, conservation priorities, and proposed strategies and actions. These have been helpful in guiding programs even if their design and implementation has been challenging at times.

CPs identified the following advantages of a regional conservation strategy:

- Address SAR within the context of multi-species recovery strategies and taking a SEAR approach to landscape and ecosystem protection: *keeping common species common*.¹
- *Identify a common direction and continued touchstone for partners.*
- Provide a regional framework for conservation activities of partner groups.
- Provide a rationale for funding identified priorities.
- Provide conservation information, recommendations and tools for external organizations.
- Communicate biodiversity issues to the public and elected officials.

Challenges have included: scoping the strategy so it doesn't take too much time and funding; lack of formal commitment to implementation by key parties, especially government, due to the informal nature of the partnership; lack of funding for implementation; and lack of accountability for plan results. Suggestions include: tackle a plan once the partnership is established and if there is a clear need, (fund-raising); ensure the plan is realistic (*do-able*); include an implementation strategy (*what, who, when?*); and devise an accountability framework (see next section).

¹ Note: The focus of the multi-year CWS Priority Places program funding this TNCI research is on multi-species recovery strategies, and landscape and ecosystem protection. A regional strategy that identifies how conserving key habitats and mitigating threats to those habitats will benefit species at risk could help support future CP proposals for CWS funding.

CASE EXAMPLES:

- CVCP bases all their work on a foundational piece [Nature Without Borders, Comox Valley Conservation Strategy](#) (2013) and its 10 guiding principles which are also embedded in the *Comox Valley Regional Growth Strategy*.
- SOSCP produced a *Regional Biodiversity Conservation Strategy: Keeping Nature in our Future* (2012), including a vision, goals, sensitive ecosystem assessment, land ownership information, and strategic directions and actions. It was accepted as policy by the Regional District of Okanagan-Similkameen. OCCP and SOSCP jointly prepared a [conservation strategy](#) for the Okanagan Region (North, Central and South) (2014), and supporting [resources](#), such as [ecosystem connectivity](#) (2014). The strategic directions guide program and project choices.

It's valuable to develop a regional Conservation Strategy: dream big and get people to buy into it. It mobilizes organizations and the general public to get involved.

Every conservation plan should list expected outcomes, have a good communication strategy, and build from there.

Several CPs are adopting accountability frameworks to better identify, measure, monitor and report on results – useful for both internal planning and demonstrating value to funders. They may include goals (expected outcomes), success measures (indicators), deliverables and responsibilities, and a monitoring and reporting plan. *It's a way to know if what we did succeeded – what has changed?*

Accountability or results-based frameworks aim to make programs and projects more effective and efficient. They can be used to assess results at the partnership level, for example, the success of a strategic plan or conservation strategy, or at a program or project level.

CASE EXAMPLES:

- CDFCP set specific, measurable goals for its land-based investment strategy which focused on protecting remaining Coastal Douglas-fir ecosystems on Crown land.
- PIF and the Nature Trust, with CWS Habitat Stewardship Program funding, did bird surveys that demonstrated the real benefits of riparian fencing for bird populations.
- KCP is increasingly assessing success in terms of measurable results or outcomes and not just deliverables, such as products and events. They have found it easier so far to assess securement programs, e.g., total hectares secured, than stewardship programs for landowners and local government, where outcomes are harder to define and measure.



Arrowleaf Balsamroot blooming above the North Thompson River valley.
Photo courtesy Mandy Ross

3.7 SCIENTIFIC AND TECHNICAL FOUNDATIONS

All CPs have used biophysical data and technical analysis as a basis for programs. A science-based approach to regional conservation helps to set priorities, goals and targets; define and measure outcomes; and show funders that proposed projects address science-based critical conservation needs.

CP approaches to scientific and technical analysis have varied. Some started out with an inventory of existing data and mapping to help define conservation priorities, while others began with defining conservation goals and priorities, then conducted the research to support them. Several conducted detailed mapping and data analysis as a basis for creating a regional biodiversity plan or strategy.

CASE EXAMPLES:

- CVCP focused on getting protection for areas identified in the *Sensitive Ecosystem Inventory for South-east Vancouver Island* (done by CWS and the Province in 1992 and updated in 2002). They worked with Cowichan Valley Regional District to update it again in 2012.
- SOSCP and OCCP each carried out **extensive conservation analyses and mapping** as the basis for Regional Biodiversity Strategies, including critical habitat mapping and rating of biodiversity values across the region (see the resulting strategies [here](#) and [here](#)).

CPs emphasized that scientific and technical work should focus on specific conservation data gaps and defined user needs, for example, as a basis for practical tools such as conservation strategies, mapping and guidance for government and private decision-makers.

Some CPs cautioned against spending too much time and effort on baseline technical work, which has often been ignored or underutilized, and has even resulted in delaying action-oriented initiatives. Instead, they suggest taking a strategic, focused approach: *assess existing information to see where values intersect spatially and then strategically fill data gaps for priority areas.*

Ask the question “who is going to use this and what are they going to use it for?” and have clear answer from the users themselves before proceeding.

Your job is to compile and analyze the [biophysical] knowledge and bring it forward; package, finish, market, celebrate, engage and use it.

As a project manager, I would do things differently. Think early about plan implementation or it will sit there and no one will use it. [In the implementation phase], we picked off the low-hanging fruit in the strategy instead of systematically going through the list of recommended actions.

Mapping alone doesn't move you forward; we have detailed mapping showing high value habitat and they build right through it anyway.



Red-tailed Hawk, Shutterstock

CPs have often had challenges finding useful regional level data and harmonizing diverse data sources, scales and types, but have identified several traditional and innovative data sources and approaches.

It can be difficult to compile data and mapping at a regional level since many sources are at either provincial or local levels, with the latter often lacking consistency across the region. Also, groups can be proprietary about their information, but this can be addressed through data-sharing protocols and confidentiality agreements. The latter are especially useful for conservation land securement teams due to the sensitive nature of the information.

CPs suggested the following approaches to information-gathering:

- Use available spatial data sets and BC Assessment Authority data.
- Draw on Western science and Indigenous Knowledge and practices, while respecting Indigenous Title and Rights devising data-sharing protocols. For example, several CPs work closely with First Nations on habitat restoration and environmental monitoring.
- Comb information from other programs and projects within the region, in neighbouring regions and at the provincial level. For example, conservation trusts have valuable biophysical data and mapping. *Learn what others are doing on watershed conservation through connecting with provincial initiatives like the [POLIS Water Sustainability Project](#).*²
- Mine the extensive citizen science available through E-bird, I-Naturalist and local naturalists, with caveats about reliability, e.g., SCCP provides citizen science education and tools, such as a [species and habitat portal](#), with species profiles and an [Endangered Species Finder App](#).

- Once you have a public profile, *let partners and community groups know you're looking for certain data and how to report it.*
- GOERT used the [Nature Serve](#) methodology to *determine hot spots and areas of high conservation without land tenure, do a cadastral layer and identify options. We assigned a biodiversity significance rating based on importance, representativeness, threats, protection urgency and priority actions.*
- The [BC Sensitive Ecosystem Mapping](#) provides the basis for regional maps and data layers. It's a snapshot in time of remaining sensitive ecosystems we used as a start. We produced user-friendly maps with polygons and legends to show areas of high conservation value and concern and assess trends, with a "report card" to assess disturbance and disappearance.
- The [Conservation Data Centre](#) has multi-agency wetlands mapping from the early 1990s, some of which is updated, that could be used to map wetland and grasslands: *It could be a useful data repository as it has some high level Dry Interior data inventory, relying on existing data and available GIS layers.*
- Many CPs access the "grey literature", i.e., unpublished or not commercially published data and mapping, accessed through member organizations and other regional and provincial environmental initiatives.



Northern Pacific Rattlesnake, Shutterstock

² The [POLIS Project on Ecological Governance](#) is a centre for transdisciplinary research that investigates and promotes sustainability, focused on key topics and situated at the University of Victoria.

3.8 ADMINISTRATION AND FUNDING

Having a competent full-time coordinator or program manager (can be staff or a contractor) is seen as a crucial success factor. Sample duties include: act as secretariat to the steering committee, coordinate activities, ensure follow-up on commitments, communicate with members and outside organizations, and provide continuity.

Hire someone from the region with good experience and solid local knowledge.

Get a great coordinator/program manager who is focused, neutral and persuasive.

You need a good grant writer or grant-writing capacity.

While a capable coordinator is essential, CPs need to find ways to keep the steering committee and members engaged in order to avoid over-reliance on one position or individual.

Having a group of committed individuals is essential, but allow for succession to provide continuity since turnover is a common issue.

You need to have enough people to do the heavy lifting on all partnership initiatives.

One of the biggest challenges for CPs is securing longer-term funding, especially for core program management and administration, including staff or contractors. They have adopted various approaches to keeping their work going.

Most CPs have gone through ups and downs in programming, often based on the availability of government and non-government (foundations and trusts) funding. Many are obliged to seek funding annually and spend considerable time on grant

applications and reporting for multiple funders. Operating costs get paid through combining small project administration fees.

CWS has been a strong and consistent supporter of SAR and habitat stewardship work for many CPs, but there has been little provincial funding since the decline in SAR projects in the mid-2000s. Several CPs have on-going support from regional district partners. CWS programs are moving from a single to multi-species and ecosystem focus, as shown by the Priority Places funding for this research.

CPs reported that a major benefit of partnership has been joint fund-raising, including identifying funding sources and preparing multi-partner grant applications. Funders are often drawn to strategic collaborations involving diverse groups. An example is the significant [multi-year federal funding](#) for KCP's "[Kootenay Connect](#)", awarded under the [Community-Nominated Priority Places Program](#) in 2019.

CPs offered various suggestions regarding funding:

- **Develop relationships with funders** and stay aware of requirements and changing priorities, e.g., fresh water and land use have been two of Real Estate Foundation of BC's five funding priorities for some time.
- **Have leaders and champions on the steering committee** and/or advisory committee who are committed to raising the CP profile and procuring funding and in-kind resources.
- **Seek multi-year funding** (3-5 years): *help funders see the value of multi-year funding for the long game, especially with the four-year local government election cycle.*³
- **Include budget for operating costs:** *pitch funders to cover core administrative tasks.*

³ Note: CWS has multi-year funding for the "Priority Places" program. In BC the Priority Places are the Dry Interior and the South Coast.

- **Get CP members to commit to even small amounts of funding and in-kind support** to keep them engaged.
Get a little bit from everyone – it all adds up.
- **Develop cost-sharing models** with external partners and clients, e.g., SOSCP and CDFCP ask for matching funds from groups they work with, such as local governments.
- **Consider a fee-for-service for CP activities**, especially for education and stewardship programs:
e.g., CVCP charges registration fees and finds sponsorships to cover administrative costs for professional development, networking and educational events.
e.g., SCCP charged fees for its “Conservation Connections” events for local governments and consultants, which features senior government experts speaking on technical topics.
- **Approach government agencies and businesses for funding or in-kind contributions**, e.g., staff time, office space, note-taking and accounting services, computers, field and lab equipment.
- **Develop partnerships with universities**, which have excellent access to diverse research funds.
- **Take advantage of CP partner networks and contacts** to identify funding and in-kind options.



Being part of a partnership has consistently proven to increase our ability to leverage funding – it’s the power of working together. Funding attracts interest – there’s a virtuous cycle.

Being able to rally letters of support from numerous NGOs for our grant applications is helpful.

To provide financial continuity through periods of stop-start funding, have some successful, on-going projects that are visible in the community and will attract consistent funding.

You have to find ways to keep it going through thick and thin.

CASE EXAMPLES:

- SCCP has had no core funding for about a decade since provincial support ended. Core activities, such as the website and annual partner and advisory committee meetings, are run on a voluntary basis, while other staff are hired through key partners using project money.
- Multisar has survived since 2002 due to its diverse funding and revenue streams, including several Alberta government agencies; the Alberta Conservation Association (ACA – hunting and fishing levies); and [Prairie Conservation Forum](#), a large coalition. The program is implemented collaboratively by several organizations, and so can expand and contract based on funding vagaries. The ACA program [Species Habitat Assessments and Ranching Partnerships](#) (SHARP) uses a similar support model, involving government, industry and NGO partners.

Blue Dragonfly, Shutterstock

Local Conservation Funds have generated significant funding for biodiversity protection in BC, in part through drawing matching funds. They are created by a regional district or municipality and administered by a regional CP on a fee-for-service basis. An independent technical advisory committee provides recommendations on community proposals in areas such as securement, stewardship and education, but the decision-making authority rests with elected officials.

KCP established the first conservation funds (Columbia Valley in 2008 and [Kootenay Lake](#) in 2014), followed by SOSCP in the [South Okanagan](#) in 2017, and OCCP for [North Okanagan](#) in 2020. Some funds use an “opt-in” model in which each municipality or electoral area within a regional district decides if it will participate. KCP and SOSCP have generated significant funds and have seen solid conservation results from projects supported through this mechanism. While it can take considerable time and effort to develop the proposal and campaign needed to garner public and political support for a fund, detailed guidance and case studies are available at [Conservation Fund Guide for BC](#).



Nature Conservancy of Canada staff conducting Annual Property Inspection, Lac du Bois Conservation Area.
Photo courtesy Danielle Cross



KILLDEER

Photo courtesy Ole Westby

4 Designing Programs

4.1 APPROACHES TO PROGRAMMING

CPs made the following suggestions on general approaches to choosing and planning programs.

Seek to have a balance of regional, sub-regional (e.g., watershed), and local scale programs. Aim for a mix of high-level, strategic initiatives (e.g., regional conservation planning, securement), and facilitating and supporting the operational, field-based projects (e.g., habitat restoration), which are largely undertaken by members. This builds a regional presence and promotes regional synergies while supporting individual partners' community-based projects.

Regional work might include producing conservation mapping and analyses; preparing conservation strategies, guidelines and planning tools; networking and information-sharing among partners; and

working with local governments, e.g., establishing a local conservation fund. Local initiatives can include projects in specific geographic areas, on specific topics and/or with certain target groups.

CPs offered various suggestions to get an effective mix of regional and local initiatives:

- Identify the appropriate mix of programs for your region and members. *Provide something for everyone.*
- Ensure programs are member-driven. *Members are the driving force, with support provided by the collaborative partnership.*
- Encourage partners to develop a broader perspective on their work and play complementary roles, based on relative strengths. *We used to talk about wildlife corridors and now it's more about entire ecosystems.*

- Take advantage of the partnership by seeking unusual collaborations and creating fresh and innovative programs, such as between environmental NGOs and resource users. *We believe in the collective impact model but the groups are the backbone.*
- The partnership should result in synergies; the sum (of the collaborative work) should be greater than the parts (the partners' work). *Find the sweet spot between getting everyone moving in same direction and supporting ad hoc member collaborations. Otherwise, it's just a loose group of organizations doing their own projects.*

CASE EXAMPLES:

- CVCP identified 52 possible activities, then picked priorities based on the criterion of regional application.
- KCP's *Conservation Neighbourhood* program facilitated Action Forums in six sub-regions. Partners learned about their specific ecosystem and landscapes from scientists and other knowledge-keepers, then identified shared priority conservation actions. *By December 2019, 22 of our 27 priority actions were underway.*
- SCCP delivers most of its regional stewardship programs through one key member organization and its networks: *The Fraser Valley Conservancy has been a real hub for our success.*

Several CPs suggested starting out *slow and small* with programming by identifying *low-hanging fruit*, i.e., relatively easy-to-deliver projects that will demonstrate results and benefits to partners, outside groups and the public. *Success will attract new partners.*

The secret to success is action, not complaining why someone else isn't doing something. Lean into it. That's how you get results.

Look for "shovel-ready" projects to attract interest, money and partners.

Depoliticize issues – get them out of the hands of politicians who may try to drive wedges.

We offer quick, cost-effective prescriptions for clients such as regional districts, the Ministry of Transport and First Nations, on issues such as habitat restoration, professional oversight, due diligence and permitting.

Most CPs have increased the scale, reach and impact of programs over time, aiming for more challenging goals as the partnership strengthens, e.g., policy change or a local conservation fund.

Once established, the CP often becomes a one-stop information portal on what's going on, and a known source of scientific expertise and technical support to external partners, e.g., CDFCP partnered with the Nature Conservancy of Canada and Islands Trust to develop a Marxan spatial tool for conservation planning and acquisition in BC's Gulf Islands.

Be flexible, experimental and responsive with programming, e.g., devise and monitor pilot projects, then adapt and expand, as appropriate. Change direction if something doesn't work.

Several CPs said it's important to let programs evolve over time and to look for opportunities to inject fresh energy and interest for partners. One CP said *always have an end date for your project.*

There is no one approach to conservation and stewardship. Adapt solutions to the area.

Be opportunistic – make hay while the sun shines. For example, piggy-back on other conservation, land use and natural resource initiatives in the region. There's a huge opportunistic aspect to this work. When an option becomes available, snap it up.

4.2 SUCCESSFUL PROGRAM AREAS

Most CPs focus on one or more of the following areas of biodiversity conservation and provided suggestions and lessons learned for each.

SECUREMENT

Coordinating strategies to identify and secure conservation lands has been a major area of success for CPs. Some have a securement team with members from government agencies and trusts with roles in acquisition and/or management of conservation lands, while others work more informally.

Securement teams are usually small as they need to develop mutual trust and commit to confidentiality due to sensitive issues related to identifying properties and negotiating purchase and management agreements. *Our team has expertise in ranking properties. We tend to take turns, based on opportunities and timing.*

CPs listed these the following advantages of collaborating on securement:

- creates a structured and strategic approach to identifying and pursuing opportunities, i.e., *who is best positioned to acquire and manage specific properties, not just loose, opportunity-based cooperation*
- provides a single contact group for donors and funders working in the region. (Note: Several BC organizations have identified the Dry Interior as a priority for securement but aren't sure who to work with Thompson-Nicola area.)
- allows collaborating partners to take on different roles in acquisition and management of conservation lands, including securement, habitat restoration and enhancement, stewardship, education and field monitoring.

STEWARDSHIP

Since many SAR and threatened ecosystems are found on private land, and land values often preclude purchase, most CPs have strong stewardship programs focused on ranchers, farmers and other landowners. Several well-established programs in BC and Alberta, including small-scale efforts in the Thompson-Nicola, could be adapted and expanded as part of the TNCI.

CASE EXAMPLES:

(See also examples in the *TNCI Situation Analysis*.)

- CWS (Delta) contacted Fraser Valley landowners, *many of whom were super excited to participate and find out what was on their land.* Others got in touch when they heard about the program, which included a species inventory, laminated SAR fact sheets, and monitoring through call playback counts and E-bird reports.
- SCCP has had success in partnering with the Fraser Valley Conservancy to deliver the [Nature Stewards](#) program, including a [Nature Stewardship School](#). Target groups include landowners, families, schools, local governments and community groups, especially in priority SAR areas. Program components include protection of conservation lands, e.g., covenants, Land Steward certification for landowners, habitat enhancement and species monitoring.
- [Multisar](#) has accumulated considerable experience in developing ranch and farm stewardship programs and networks in Alberta since 2002, including:
 - [Habitat Conservation Strategies](#)
 - [Species at Risk Conservation Plan](#) (SARC)
 - [Beneficial Management Practices](#) (BMPs) for Species at Risk

CPs have derived the following lessons learned from their stewardship program experience:

- There is growing interest in conservation and environmental sustainability in the ranching and farming community, with many landowners interested in practical ways to participate. *Attitudes have changed over the last 10 years. For example, the Canadian Round Table for Sustainable Beef is now allying with NGOs.*
- Community-based Social Marketing is a helpful outreach tool, given its focus on analyzing what behaviours need to change and how to reach the right people. *Identify what will convince and motivate people, i.e., certification, prizes and technology, such as trail cameras.*
- Peer influence is a strong motivator among landowners. *Try to connect and work with key properties early on, and the program will spread through word-of-mouth. We hosted tours on a ranch that was a big player in the area and now people are calling us to participate, with 10-12 producers on the waiting list. The idea is “if he likes you guys, you must be alright.”*
- Other motivations for landowners to participate include:
 - access to funding for enhancements, e.g., fencing and water units to keep cattle out of riparian habitats
 - their own interest in the health of their land, its plant communities, carrying capacity and ecologically sustainable stocking rate, combined with Range Health measures, including getting a baseline and monitoring changes
 - helps them obtain Sustainable Beef, Environmental Farm and other eco-certifications
 - helps them negotiate land restoration compensation for pipeline crossings or oil and gas wells on their property

Landowners may be skeptical at first. It takes time to build rapport but more will sign on when they see success.

We’re there to find what [landowners] are doing right and see if we help them maintain and enhance it. Our message is “you have SAR on your land because you’ve done something right; it’s a positive thing, an asset.”

Twenty per cent of population are naysayers and want nothing to do with you. Focus on getting the first 20%, the go-getters who will become leaders in the community, and the other 60% will come on board.

The Thompson-Nicola could draw on examples of stewardship programs in the Fraser Valley, which has some similar types of communities and conservation issues.



Sage and Sparrow Tour Nature Conservancy of Canada
Photo courtesy Bryn White

CPs provided the following suggestions for effective stewardship programs:

- Coordinate SEAR data and programs between groups doing stewardship in protected areas and conservancies and those working on private land to harmonize best practices across tenures.
- Build relationships with producer organizations such as the BC Cattlemen's Association, NGOs such as the Grasslands Council and influential landowners.
- Landscape and multi-species approaches are beneficial but can be more complicated and challenging for stewardship programs. Ensure that special focus is still given to priority SAR.

Try to work with people who are wary; they often get “converted” and then are proud of the results.

It's all about LLL – listen, learn and liaise. To get started, talk to the landowners. There are a lot of kitchen table talks with coffee, often over several visits. Many love wildlife and you learn from them because they've managed the habitat for generations.

The idea of protecting biodiversity can be complicated, even sensitive for some landowners. It's often preferable to focus on species they like, such as frogs and owls.

WORKING WITH LOCAL GOVERNMENT

Most CPs have found a productive niche in working with regional and municipal governments due to their central role in land use planning and development approvals. Since many CPs have identified poorly managed urban and rural development as major threats to SEAR in their region, they have chosen to support local authorities to better integrate conservation into their decision-making.

Work with local governments has included providing biodiversity data, mapping and conservation analyses, local conservation tools and technical support. A common focus is protecting sensitive

habitats such as woodlands, grasslands, watercourses, riparian areas and wildlife corridors. CPs have helped local bodies integrate conservation measures into regional plans and growth strategies, Official Community Plans, zoning bylaws, Environmental Sensitive Development Permit Areas and park and greenspace planning.

CPs identified the following common challenges in working with local government:

- complex jurisdictional landscape
- limited local government legal and regulatory tools
- lack of conservation knowledge, experience, time and/or interest among managers and staff
- varying levels of political awareness, interest and will
- turnover of elected officials and staff.

Possible responses include: engage elected officials directly, build staff capacity on tools and techniques, e.g., through peer learning, workshops, on-line aids, and offering technical support.

Tools aren't enough; you need direct outreach and examples from elsewhere.

After presenting our wildlife corridor work, we had a standing ovation and the mayor and council wanted to know more about environmental and climate change issues.

Several CPs have successfully linked their conservation work to regional growth and sustainability strategies, and by approaching officials at opportunistic milestones, such as the initiation of a new Official Community Plan or the arrival of a “greener” council.

CASE EXAMPLES:

- CDFCF has partnered with the Islands Trust to develop a [Coastal Douglas-fir and Charter and Tool Kit](#).
- CVCP worked with regional and local government to integrate conservation into policies, by-laws and plans, such as the Regional Growth Strategy. This involved *developing relationships (be proactive in setting up lunch and coffee dates!) and presenting and meeting with mayors and councils, senior planners, CAOs and staff, especially the environmental “champions”*.
- OCCP is assisting local governments to incorporate wildlife corridors mapping and protection measures into the District of Lake Country and City of Kelowna Official Community Plans.
- SOSCP provides technical support to local governments in the program area, to help them meet their environmental planning needs, including biodiversity commitments in the Regional Growth Strategy. This included preparing a biodiversity strategy and related local government support materials, and managing a shared environmental planner to help the regional district and municipalities with implementation, using a cost-sharing model. *We demonstrated the benefits of conservation and provided the science and planning tools to do it.*
- Several CPs (SOSCP, CVCP) have done public polling on environmental topics to present to local elected officials, managers and staff in support of specific conservation initiatives, e.g., a water management strategy or local conservation levy.



Western Bluebird
Photo courtesy Ole Westby

COMMUNITY AWARENESS AND EDUCATION

All CPs are involved in community awareness and education on conservation topics, often as part of other programs, e.g., landowner or school outreach may be part of a stewardship program.

Some CPs are rethinking their community outreach programs to better address issues of overlap with other groups and programs, adapting to a digital world, and finding ways to better measure program impact.

It was noted that outreach programs tend to attract those already interested, i.e., *preaching to the choir*, without necessarily reaching those whose behaviours and actions most affect biodiversity, such as recreationists and those working in various natural resource sectors. In response, some CPs are focusing education more systematically on key target groups and seeking ways to better assess conservation outcomes.

PROGRAMS BASED ON NATURAL ASSETS OR ECO-ASSETS APPROACH

Several new tools use the concept of “valuing” or “costing” natural assets (or eco-assets) and ecosystem services to generate incentives for local governments and landowners to conserve natural resources and protect habitat. For example, the **Municipal Natural Assets Initiative** (MNAI) helps local governments identify, value and account for natural assets when managing municipal infrastructure and services. The **Farmland Advantage** program applies this concept to private landowners.

Sample MNAI topics include climate adaptation and wetland protection. The **Key Documents** tab on the MNAI website provides guidance for municipal managers (including brief *Decision-makers Summaries*), on topics such as using municipal asset management in financial planning, municipal planning and private landowner collaboration. Case studies include Grand Forks, Sparwood and Courtenay, the latter of which resulted from a collaboration between CVCP and the regional district. See more on this topic at the **Smart Prosperity Institute**.

The **Farmland Advantage** project (FA) works through the BC **Environmental Farm Plan Program** to help farmers identify the natural values on their farm that can be protected and enhanced, including ecosystem goods and services such as water and wildlife habitat. It then recommends best management practices such as riparian setbacks, strategic fencing, reforestation and rangeland enhancement, and contracts the farmer to implement them.

FA is a five-year research and development project involving 60 farmers in the Lower Mainland, Okanagan and Kootenays but hopes to expand over the long term with more partners. They are also in partnership with the Shuswap Indian Band and the Ktunaxa Nation (Cranbrook) and ʔakisqnuuk (Windermere) to restore regional waterways in preparation for the return of sea-run salmon to the Columbia Headwaters.

Another eco-assets program is paying farmers \$1000 per hectare to set aside riparian corridors on their land with funds from the Columbia Valley Local Conservation Fund, established through KCP (See Section 3.8). Said one rancher: [We aren't in the program but] *we have two miles of riverfront away from the ranch that are fenced off and we don't graze cattle there; we paid \$3000 per acre for that land so we see that as our contribution to conservation.*



White Lake Biodiversity Ranch, The Nature Trust of BC
Photo courtesy Bryn White



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5 Conclusions

Regional collaborative partnerships have a proven record in delivering strong programs and solid results for conservation. While they have chosen diverse collaborative structures, governance and programming, this report has revealed common lessons learned and best practices that will be helpful for the Thompson-Nicola Collaborative Initiative as well as other current and future conservation partnerships.

Research conducted for the TNCI Phase 1 *Situation Analysis* showed that organizations in the Thompson-Nicola are keen to learn from, and network with, other CPs during TNCI design and implementation.



Photo, top: courtesy Grasslands Conservation Council of BC;
above: Fir tree, Shutterstock