

*Going Forward*  
**Sustaining a Transboundary Partnership**

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**Waterton Biosphere Reserve Association**

**4<sup>th</sup> Annual Transboundary Grasslands  
Partnership Workshop December 4, 2018**





# PRESENTATION OVERVIEW

- ***Regional collaboration – key elements***
- ***Transboundary Partnerships***
  - *Organizational attributes*
  - *Human attributes*
  - *External factors*
- ***The ebb and flow of a partnership***

*(Jennifer Thomsen, University of Montana)*
- ***Concluding Remarks***





# Ten Key Elements of Regional Collaboration \*

1. **Catalyst:** the crisis, threat, or opportunity that compels people to think and act regionally.
2. **Leadership:** the need for different types of leaders to catalyze, enable, and sustain action.
3. **Representation:** the people, organizations, and jurisdictions needed to achieve the desired outcome.
4. **Regional fit:** the tension of matching the problem-shed with people's interest.
5. **Governance:** the degree of decision-making authority, along with mechanisms for funding and dispute resolution.
6. **Learning:** the process of facilitating scientific and public learning.
7. **Strategy:** the formulation of a vision, goals, and aspirations.
8. **Implementation:** a plan to move from vision to action.
9. **Outcomes:** the agreements, policies, programs, and on-the-ground accomplishments achieved.
10. **Adaptation:** the ongoing process of monitoring, evaluating, and adapting as needed.

\* Large Landscape Conservation: A Strategic Framework for Policy and Action

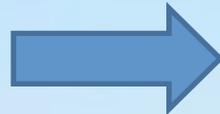
McKinney, Scarlett and Kemmis (2010)



# Organizational Attributes

## **GOVERNANCE**

**LESS**



**MORE**

- Overly complex structure compared to actual needs
- Reactive & short term solutions for governance needs
- Lack of administrative or operational capacity
- Bottom up OR top down commitment

- Structure nimble and responsive to short and long term needs
- Creative & long term solutions for governance needs
- Appropriate level of investment in capacity
- Bottom up AND top down commitment

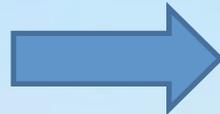




# Organizational Attributes

## **REPRESENTATION**

**LESS**



**MORE**

- **Disconnect – mandate doesn't reflect participant interests**
- **Key participants to achieve mandate absent**
- **Focus on individual interests, not partnership mandate**

- **Alignment – mandate reflects participant interests**
- **Key participants to achieve mandate engaged-constructive**
- **Focus on collective interests based on partnership mandate**

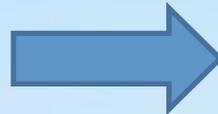




# Organizational Attributes

## *PLANNING*

**LESS**



**MORE**

- No planning- activities are reactive & often opportunistic
- Lots of plans but very little action or results
- Plans are reviewed by a few/leadership group
- Plan updates are rare and rarely reviewed
- Workplans proactive & nested in strategic plans
- Planning provides a focus & outcomes
- Plans are reviewed by all members
- Plans reviewed & updated periodically

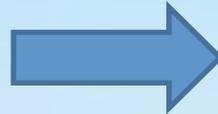




# Organizational Attributes

## *OUTCOMES*

**LESS**



**MORE**

- Outcomes & results are defined by individual member actions
  - Outcomes are driven by plans OR opportunities
  - Lack of capacity to achieve outcome
  - Risk tolerance too low or too high
- Outcomes & results are defined through collective action
  - Outcomes are driven by plans AND opportunities
  - Capacity in place to achieve outcome
  - Risk is appropriately managed

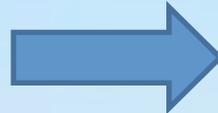




# Organizational Attributes

## *CAPACITY*

**LESS**



**MORE**

- Limited personal commitment
- Limited fiscal resources or from few sources
- Leadership provided by a few

- Strong personal commitment
- Adequate fiscal resources and from diverse sources
- Leadership provided by many

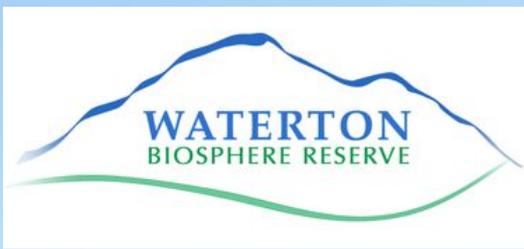




# The Human Factor

- **Motivation of participants is the foundation**
- **Listening and understanding is a big enabler**
- **A strong commitment to act and contribute is contagious**
- **Respect is a pre-requisite for engagement and trust**
- **Trust takes months and years & is lost in seconds**
- **Diverse backgrounds, perspectives and personal styles are a strength but they can easily be a liability**





# The Human Factor

cont'd

- **Ensure constructive ways to manage conflict**
- **Use science and evidence to enhance common understanding, problem definition & action**
- **Focus on results not process; that's the reward that stokes the motivation**
- **Patience and persistence are essential attributes of long term partnerships; there will be ups and downs.....**



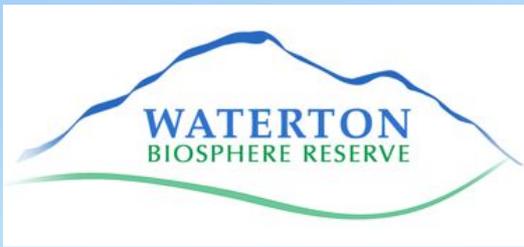


# The ebb and flow of partnerships

- Partnerships go through stages and “ups and downs”
- Organizational structure, the human factor and external factors all contribute to or detract from long term sustainability
- Research or case study (Jennifer Thomsen, Univ Montana):

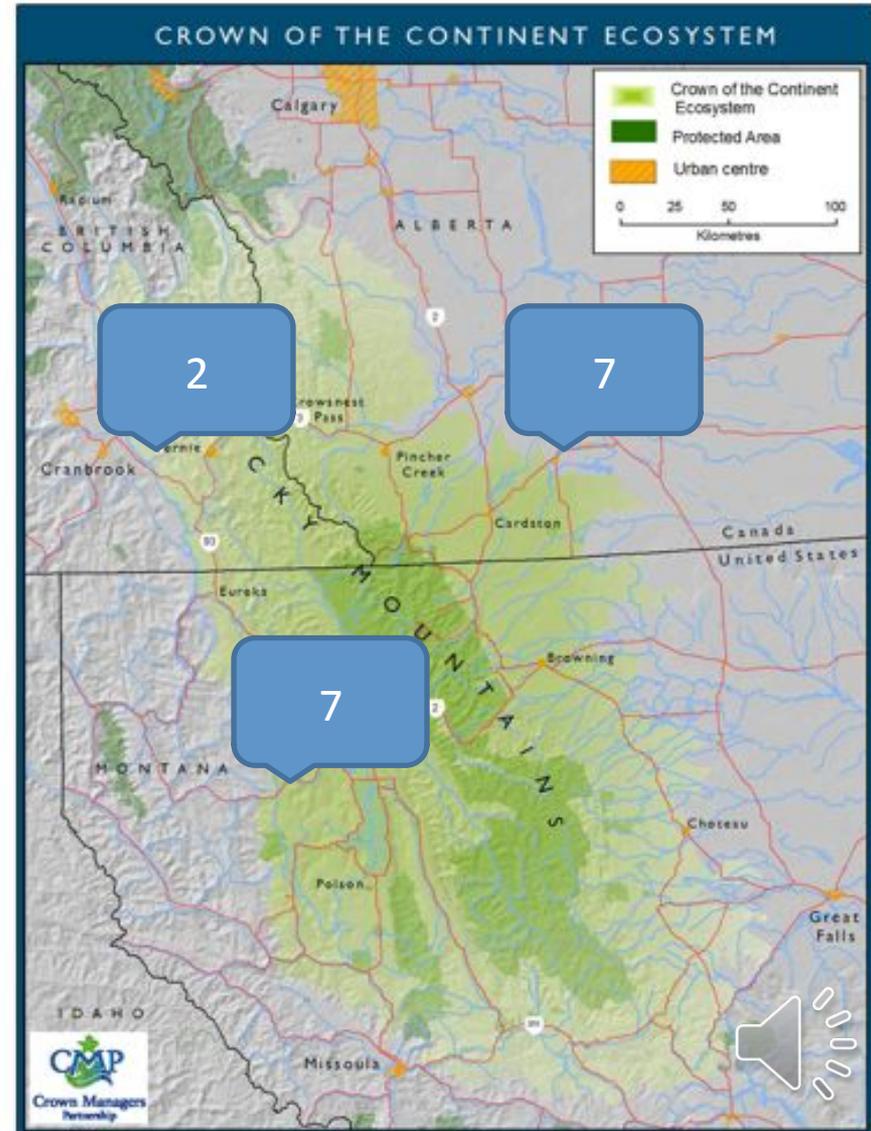
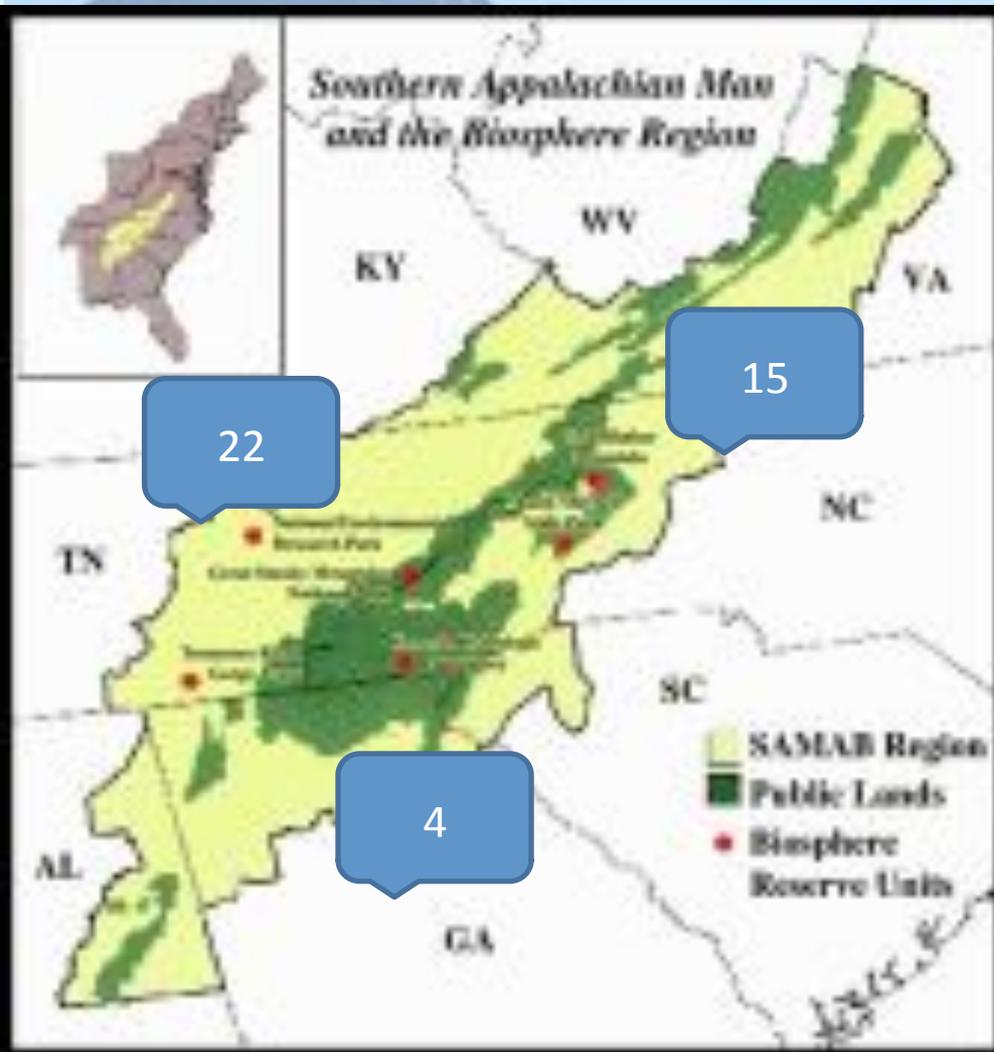
**Organizational Life Cycles of Large Landscape Conservation Organizations (LLCOs): Case Studies in the Southern Appalachians & Crown of the Continent**





# Interview Distribution

SAMAB = 41  
CMP = 16





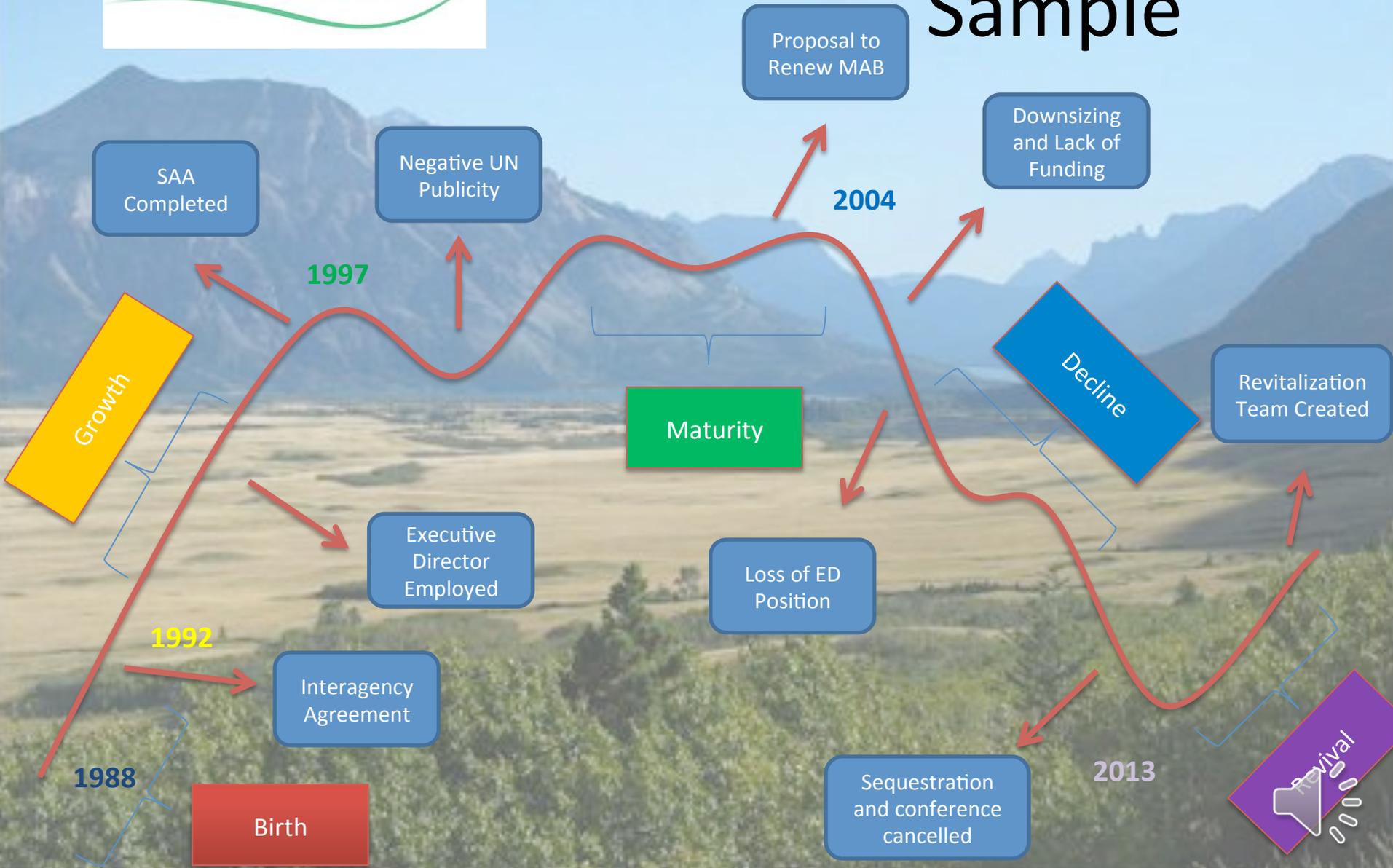
# Research Questions

- **RQ1:** What types of events/changes are significant in the life cycle stages of LLCOs?
- **RQ2:** What internal/external factors support or inhibit success at the different life cycle stages of LLCOs?
- **RQ3:** How is success interpreted by LLCO members?



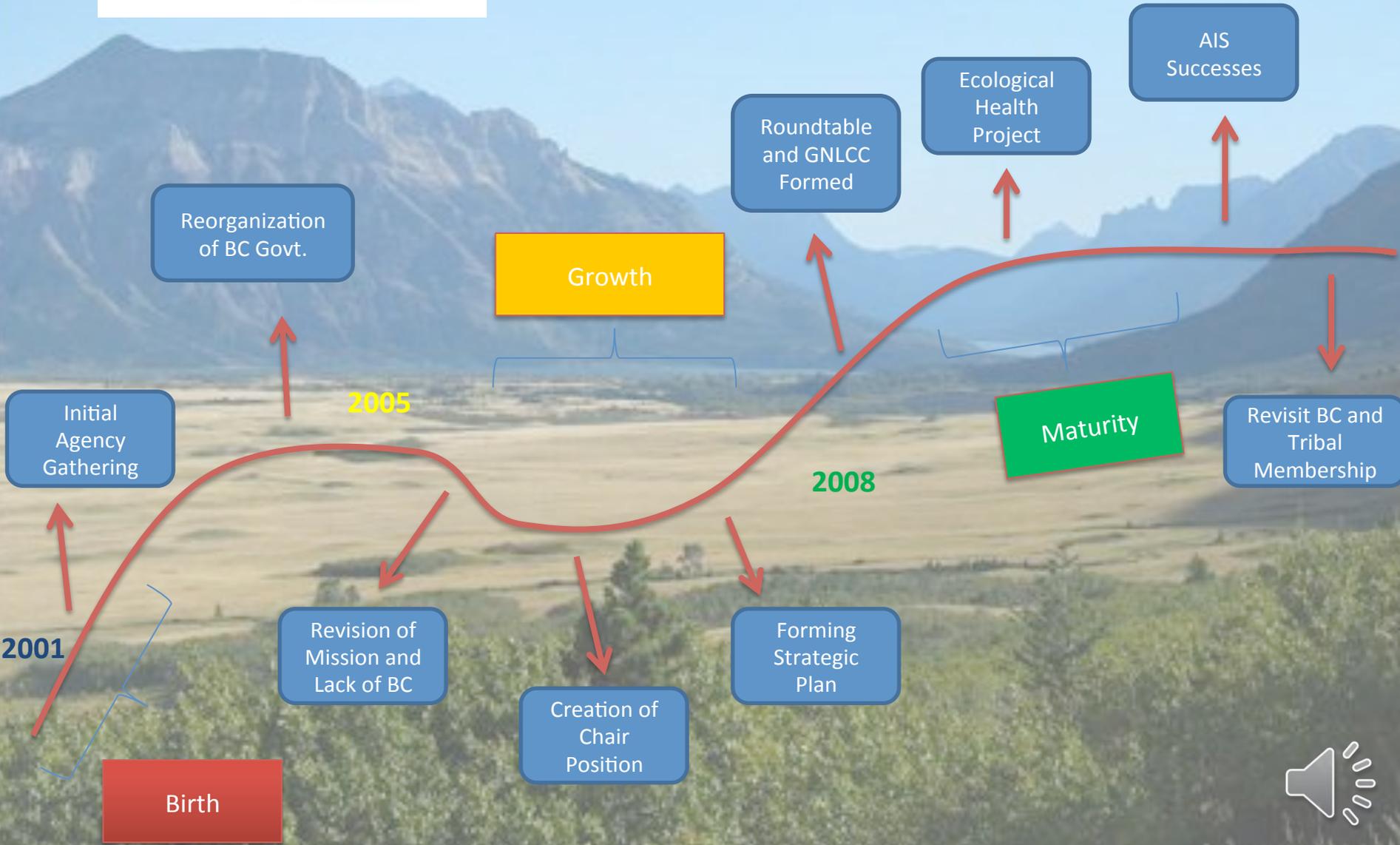


# SAMAB Life Cycle Sample





# CMP Life Cycle Sample



## Growth

- Project with High Appeal and Utility
- Formal and Informal “Face-to-Face” Meetings
- Anticipation of Member Changes
- Adequate and Diverse Resources
- Support for Members’ Involvement
- Leadership Networked in the External Environment
- Public Support

## Maturity

- Long-term Planning and Utility of Projects
- Knowing and Maintaining Purpose
- Smooth Member Transitions
- Distributive Leadership
- Strong Relationships and Legitimacy
- High-Level Agency and Political Support
- Cooperation with Peripheral Groups
- Openness to Change and New Ideas

## Decline

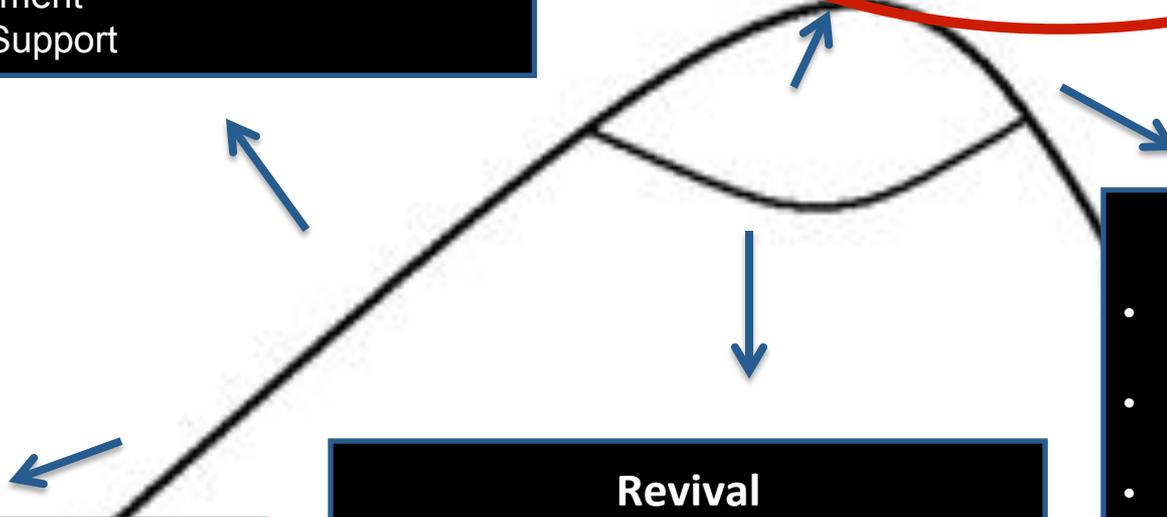
- Lack of Direction and Action
- Decreased Organizational Commitment
- Declining Resources
- Lack of Leadership
- Negative Image
- Limited Adaptation and Innovation
- Competition

## Revival

- Facilitation
- Reengage and Diversify Membership
- Motivating and Visionary Leadership
- Partner with External Groups
- Define and Promote New Image

## Birth

- Unique organizational niche
- Entrepreneurial Leadership
- High Level Support
- Strategic Membership





# Influential Factors: Maturity

## SAMAB

Lack of Long-term  
Planning/ Project Lost Utility

“Someone referred to it as a thorough medical checkup... if you don't go to the doctor afterwards it didn't fix it. It did a lot of good and got a lot of attention... Not nearly enough follow-up to remedy the problems and take advantage of the opportunities that it offered.”

**Long-term  
Planning and  
Utility of Projects**

## CMP

Long-term Strategic  
Planning and Outlined  
Benchmarks

“having a framework and a strategy to move forward and accomplish real tangible things is an accomplishment in itself...they have a well thought of framework and mission within that ecological health project that's going to sustain them for many, many years.”





# Influential Factors: Maturity

## SAMAB

Eventually Lost Sense of Purpose and Direction

“I think we had an identity crisis. It wasn't clear where we were going or what we were there for and how we were going to get there...We needed another major project. Then we could have all gotten behind it. I never really felt that that solidified.”

**Knowing and Maintaining Purpose**

## CMP

Regularly Revisited Mission and Strategic Plan

“the strategic plan as a guide to what they are doing and that helps them focus their efforts instead of just jumping on bandwagons...then do a work plan every year and that helps keep the group on track.”





# Influential Factors: Maturity

## SAMAB

Lack of Recruitment /  
Orientation Strategies

“If you keep changing the people, you keep falling back to an earlier stage because everyone isn’t on the same page and you don’t know where you are going.”

“didn’t feel like there was any attempt by anybody to really educate any of the new people about what SAMAB is and what it’s done in the past.”

**Smooth  
Member Transitions**

## CMP

Proactive Recruiting/  
Orientating New Members

“it has been very important to us to bring new people in to form those relationships and for everyone to become familiar with the work and the thinking behind the work that we do and then to move it forward.”





# Influential Factors: Maturity

## SAMAB

New Executive Director  
Focused on Technical  
Leadership

“he had a big focus on sort of  
the technology.”

“it would have helped if they  
had been a little more skilled  
at fundraising and  
development of goals.”

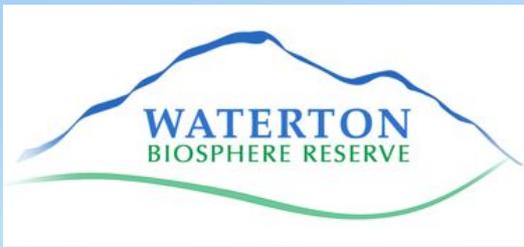
## CMP

Distributive Leadership  
and New Chair

“very shared leadership in that  
everybody just sort of knew  
what their role was and how to  
go about getting it done.”

“...position is not so much like  
the primary thinker...so I would  
think that could be rotated  
around anyone could fill that  
leadership role.”





# Influential Factors: Maturity

**SAMAB**

**CMP**

**Maintain  
Relationships and  
Legitimacy**

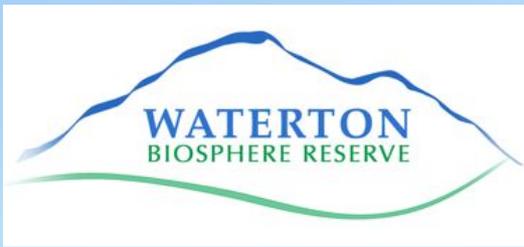
“You do build a sentiment towards an organization that you spend some time with... you like going to the executive committees because you want to talk with different folks you have not seen for a while. And so the camaraderie was one of the impetuses for staying involved.”

“I have plenty of work to do back in my own agency. Now if there is some way SAMAB can help me accomplish that work, I’m all for it, but I’m not out here trying to get myself another job, some other duty.”

“You are engaged at more than just the working level. I think everybody genuinely cares about each other. Because of that I think it makes people a lot more committed and seeing the value in it and being accountable.”

“it’s going to take a kind of a broad change in mindset to get to that point where cooperation is not a luxury; it’s the main part of doing business to have efficiency and effectiveness.”





# Influential Factors: Maturity

## SAMAB

Challenges with  
MAB Support

**High-Level  
Agency and  
Political Support**

## CMP

Challenges with  
Provincial Support

“There was a lot of concern of the UN taking over the management of federal lands and black helicopters and a lot of really kind a wacky stuff about fear that the federal government or the UN was going to dictate how private land should be managed.”

“in order for an organization like SAMAB to be successful it’s going to have to face up to those forces.”

“You know if you changed political parties and therefore political perspectives then one party might encourage involvement and the other one would discourage it and you know groups in BC would just kind of disappear from the CMP.”

“lose that sort of momentum if we do not have that agreement or partnership elevated to a higher level.”





# Influential Factors: Maturity

## SAMAB

Lack of Cooperation/  
Ignored Competition

**Cooperation  
with Peripheral  
Groups**

## CMP

Active Efforts to  
Build Relationships

“a competitor to the SAMAB group....felt they were somehow going to take over SAMAB or be the functional SAMAB and so a lot of the resources from agencies devoted to SAMAB at some point got diverted to the XXX group.”

“for our discrete project we got funding from the GNLCC and raising money from the XXX Foundation through the Crown Roundtable.”

“the CMP was pretty actively trying to understand and try to work with it [other groups].”





# Influential Factors: Maturity

## SAMAB

Low Levels of  
Adaptation and Innovation

“I think that when they did not work well the obvious thing to do was to kind of go back in one’s shell.”

“We tried to push for things that were outside the comfort zone of the agencies and got pushed back very quickly, so they let us know that we were not to consider ourselves flag carrying leaders trying to do new things.”

**Openness to  
Change and New  
Ideas**

## CMP

High Levels of  
Adaptation and Innovation

“the group was receptive to anything”

“very open to new ideas.”

“The world is constantly changing. We’re trying to get ahead of the curve, not respond to it.”





# Concluding Remarks

- **Organizational structure, external considerations and the human factor all contribute to sustaining a transboundary partnership; understand how they impact your partnership**
- **The human factor is the critical piece to advance opportunities and overcome barriers in both organizational structure and external factors**
- **Actively seek out and retain individuals and diverse interests (on an ongoing basis) who are motivated to advance the vision and mission of the partnership**





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