COLLABORATIVE STEWARDSHIP TOOLKIT

A Practitioners' Guide, Designed to Support

Land- & Seascape Collaboratives

2026

Use & Attribution

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We encourage using the material shared within to support the development and evolution of your collaborative, in courses or workshops that you may facilitate, during professional development, or for personal use. By citing this toolkit in materials you use as-is or create derivatives from, you help ensure that a growing number of practitioners find their way to this resource.

NOTE TO READER: This interim toolkit will be replaced by a web-based version in fall 2026, where we will continue to add additional resources and insights over time.

Please check https://calandscapestewardshipnetwork.org/collaborative-toolkit to ensure you have the most recent version.

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Cover photos (from left to right): Top row – Brigitte Werner (open source), California State Parks, Anne Ed-C (open source). Bottom row –Save the Redwoods League, League to Save Lake Tahoe, Sharon Farrell.

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Resources

The resources below are described in more detail within the context of the sections where they are found.

Acknowledgements

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About the Authors

Sharon Farrell and Michelle O'Herron have spent decades working with landscape stewardship collaboratives across the United States, with a primary focus on California. Their work has helped launch and form new collaboratives at multiple scales, including One Tam, the East Bay Stewardship Network, the Joshua Tree Conservation Coalition, and the California Landscape Stewardship Network. They have also facilitated partnership assessments; strategic planning; and ongoing capacity, operations, projects, and programs for existing collaborations, as well as helped others transition to new phases of their work. Michelle has helped guide multiple ecological assessments for collaboratives, and Sharon has contributed to the development of several key frameworks, including the Collaborative Capacity Framework and the Collaborative Capacity Impact Model™.

While each collaborative is unique, the guidance and examples in this toolkit have been drawn from the authors' extensive experience and are intended to provide a foundation upon which users can build the specific tools and approaches they need.

Reviewers

The authors would like to send a special thanks out to those who generously shared their time to review and contribute to an earlier draft of this toolkit. Your insights and experience were invaluable in helping improve this resource for our community of practice. They are:

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Introduction

The past several decades have seen an increasing need to tackle complex environmental and social issues at a meaningful scale. This has required land-/seascape stewardship to evolve from single-species management, exclusionary protection, or command-and-control practices to a cross-boundary, -culture, and -sector approach that centers the need to understand local conditions and community priorities.

California, like much of the country, continues to shift to a multiple-benefit approach that includes climate and wildfire resiliency, biodiversity, access, equity, and a broader focus on sustainable communities and ecosystems. Non-Indigenous land and water stewardship practitioners are also beginning to recognize that these shifts align with the practices and lifeways of a diversity of cultures, which have been actively stewarding these lands since time immemorial.

Supported by emerging landscape-scale policy tools, a new wave of relationship-based collaboration has emerged. Collaborative stewardship approaches are now integrated into most of the state's environmental plans (Wright, 2020). For example, locally led, regional planning is central to the Pathways to 30x30 initiative (2022), Climate Adaptation Strategy (2022, 2024 update), Natural and Working Lands Climate Smart Strategy (2021), Wildfire and Forest Resilience Action Plan (2021), State Parks' Path Forward Strategic Plan (2024), and the Marine Protected Area Statewide Leadership Team: Work Plan (2025–2030).

Statewide networks have also emerged, specifically, the Marine Protected Area Collaborative Network (2012) and the California Landscape Stewardship Network (2016). Both help advance cross-boundary approaches to statewide stewardship challenges and opportunities (See Appendix 2).

Though it is hard to quantify nationwide, research and practice indicate there are well over a thousand landscape stewardship collaboratives.[1,2] These groups span ownership boundaries and encompass multiple watersheds, firesheds, communities, projects, and/or existing partnerships. Their work is based on fundamental shifts in thinking about how stewardship can be done, including:

- **Geographic scale.** Transcending ownership boundaries to work at the scale of an interconnected land-/seascape that supports biodiversity, ecological function, climate and wildfire resilience, equitable access, and other shared objectives.
- **Perspective.** Considering the entire land-/seascape—private or public, developed or wild—in a thoughtful and integrated manner.
- **Process.** Moving beyond traditional decision-making processes and top-down hierarchies; characterized by inclusive, values driven, collaborative structures, and often filling governance gaps.[3]
- **Practice.** Seeking to integrate different ways of knowing; incorporating multi-benefit, socio-ecological systems-based and relational approaches.
- **Drivers.** Addressing complex socio-ecological challenges and opportunities at a land- and seascape scale, without necessarily having a regulatory mandate driving their purpose and priorities.

Although stewardship collaboratives aren't new, their scale and complexity, as well as the expectations of what they can do continue to grow. In some regions, collaborative stewardship approaches have become the primary way of working.

Effective collaboration requires those involved to step outside familiar roles, embrace risk and uncertainty, shift mindsets, and adjust how they operate. There

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[1] Resources such as www.Findacollaborative.org, the California Landscape Stewardship Network map, the Network for Landscape Conservation, the Marine Protected Areas Collaborative Network, and the Chesapeake Steward Map have information about different land- and seascape stewardship collaboratives.

[2] In this toolkit, "collaborative" is used as an umbrella term for a group engaged in collective action to achieve shared goals, including partnerships, coalitions, alliances, networks, etc. (see Appendix 3)

[3] Through bringing people together across sectors to understand and address shared challenges or achieve a common purpose, and then to link those to existing implementation channels (often back to organizations and agencies that have the funding and capacity to act at scale).

is no activity more essential (especially in the beginning) than taking the time to build and strengthen trust,[4] relationships, and connectivity. This includes among partners, within partners' organizations, and with other interested parties such as community members. Along with the shift to working this way comes the need for new skills and capacities to help these groups form, effectively operate, equitably engage, and adapt over time.

None of this is easy, and it may feel like it's being added on top of already full workloads. However, collaborative stewardship and conservation approaches are becoming increasingly critical. "Why should we collaborate?" is no longer the dominant question. Instead, many wonder, "How do we establish and design an effective collaborative?" and "What is needed to build, sustain, or renew or retire a collaborative?"

Answering these questions is the focus of this toolkit.

Users are invited to explore the advice and resources within based on where they are in their process, and to adapt what is here to meet their individual needs. The toolkit's authors have made this living document open source and available to anyone as a statement a commitment to equity and inclusion and as a way to help continue to build a stewardship movement. **The online version of this document will be where to find the latest updates**. Please contact the authors if you have ideas or additional tools of your own to share.

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[4] Trust is created by factors such as reliability, competence, honesty, transparency, being open to discussion, and benevolence.

A Reference: Key Land-/Seascape Stewardship Collaborative Characteristics

A representative sample of landscape[5] and seascape[6] collaboratives and their key design components is included in this **Matrix of California-based Stewardship Collaboratives**. The matrix is intended to help ground the concepts discussed in this toolkit and illustrate how they play out in different groups across the state. The sample of collaboratives included in the matrix are mostly those that either have California State Parks as a partner or are seeking to work with them more. The same approach could be applied to assessing models with a federal component or those that are more community led.

Regardless of their individual approaches, all of these collaboratives develop the following important characteristics as they evolve and mature:

- **Collective action.** Bring together various partners, including community groups, government agencies (federal, state, Tribal, local), nonprofits, academic institutions, and private landowners, to accomplish shared priorities and foster meaningful relationships.
- **Established structure.** Work within an adaptive, co-designed structure—including essential coordination capacity and collaborative infrastructure—that is responsive to shared needs.
- **Inclusive governance.** Co-create processes and fill governance gaps, often working in situations where existing structures are insufficient. Strive to engage a spectrum of land-/seascape collaborators and partners, bridging interests, perspectives, and cultures to find common ground and share power, assets, and accountability.
- **Integrated approach.** Operate at an appropriate geographic scale while recognizing the interdependence of social, economic, and environmental

[5] A **landscape collaborative** is a place-based group of diverse partners working together across boundaries to address complex, large-scale challenges related to the stewardship, conservation, and resilience of a specific geographic area. These typically involve a wide range of participants from multiple sectors, including government agencies, Tribes, nonprofits, private landowners, academic institutions, and community groups. (Huayhuaca & Reid, 2019).

[6] A **seascape collaborative** refers to a joint effort or network that includes managers, community groups, Tribes, commercial and recreational fishermen, and non-governmental organizations that work together to manage marine and coastal environments (Steadman, 2021).

dimensions of their shared goals, including biodiversity, ecosystem function, community health, working lands, and cultural heritage.

- **Leveraged knowledge and resources.** Rely upon a range of information—including practice, research, local expertise, and traditional ecological knowledge—to achieve effective, long-lasting stewardship and conservation outcomes.
- **Place-based.** Focus on geographically defined land-/seascapes comprising multiple landowners and/or sectors.
- **Practitioner-based.** Focus on real-world experience and applications, often leading to improvements in stewardship practices.
- **Shared purpose and strategy.** Co-create and pursue shared interests and strategies for long-term landscape or seascape health.

Using the Toolkit

Audience(s)

This toolkit is for anyone interested in learning about collaboratives but is particularly useful for those who are focused on their operational and administrative needs. This includes:

- Coordinators, leadership teams, practitioners, and partners of existing collaboratives
- Those who are seeking to start or join stewardship collaboratives
- Backbone organizations[7] and fiscal sponsors

Specific audiences within California State Parks include:

- Cooperating organizations that already or want to have a role with the agency
- Staff (at District and headquarters Divisions, such as the Natural Resources Division) interested in joining/creating stewardship collaboratives

[7] A dedicated entity that provides the essential infrastructure, coordination, and support necessary for collaboratives to succeed.

- District Cooperating Association Liaisons
- Partnership Office staff

Purpose

Arranged by specific life-cycle developmental stages (e.g., forming, building, sustaining, transitioning; see Figure 1), this toolkit is curated to help address some of the most driving questions about land-/seascape collaboratives, including how to form and sustain them, design them to successfully and inclusively achieve desired outcomes, and create the systems and infrastructure to achieve and sustain on-the-ground impacts.

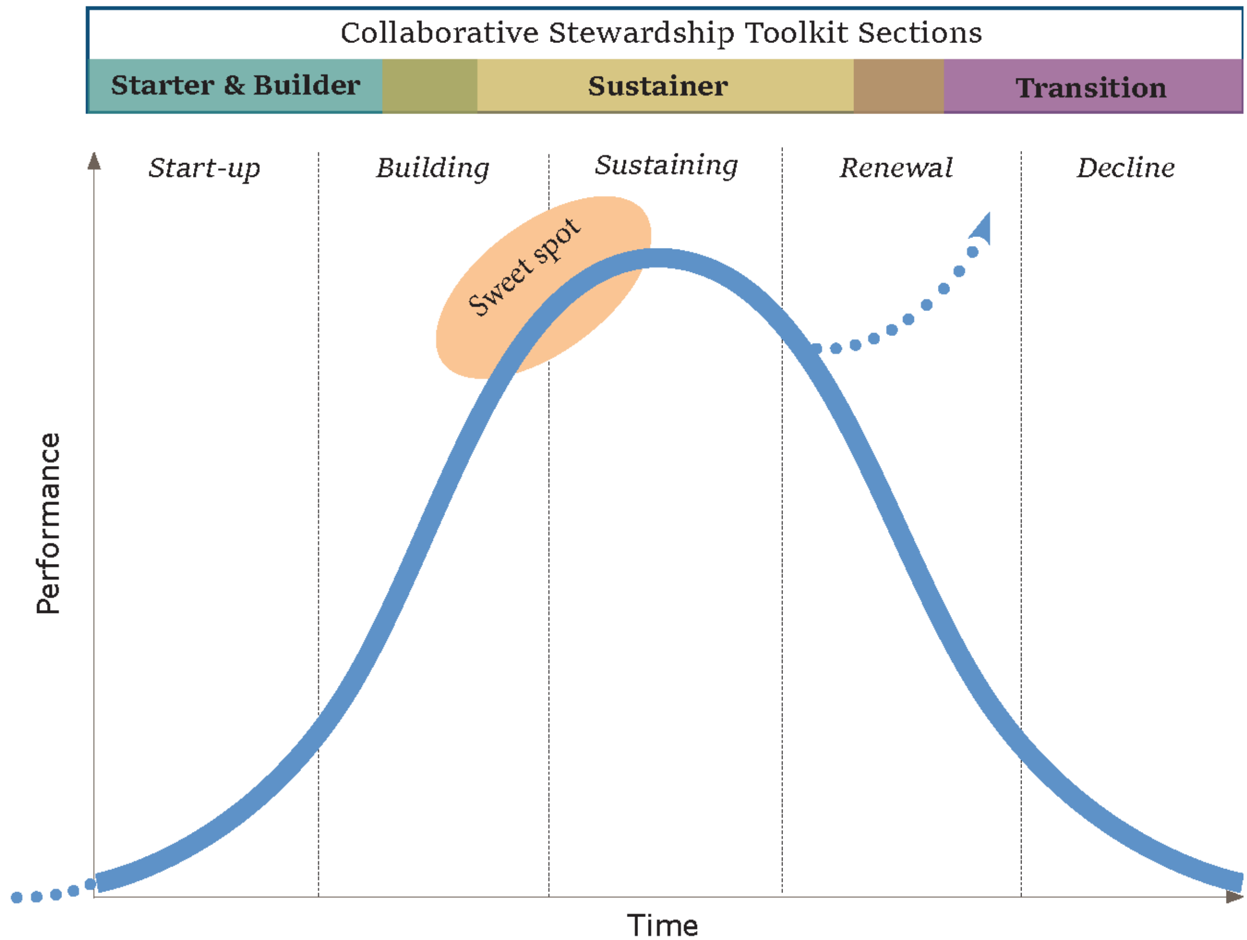
However, this toolkit is not intended to be exhaustive. It should be used to complement broader conversations about a shared vision and values for a place; trainings in collaborative skills, abilities, and leadership; and practices to foster equitable participation and meaningful community engagement. It does not include guidance for formative discussions about partnership readiness other than this worksheet for assessing collaborative readiness. It also does not delve into the nuanced, relationship-based, and often site-specific approaches to Tribal engagement. This and other topics not included here are well covered by others: The Collaborative Skills & Abilities and Supplemental Resources sections contain relevant content and recommended resources in these areas.

Organization & Navigation

Structure

This toolkit is organized into three sections: the **Collaborative Stewardship Starter & Builder Kit**, the **Collaborative Stewardship Sustainer Kit**, and the **Collaborative Stewardship Transition Kit**. These are based on the lifecycle stages illustrated in Figure 1. You can determine which section best suits your needs based upon your own knowledge or through completing Part 1 of the **Collaborative Life Cycle and Capacity Assessment**.

Figure 1. Collaborative Life Cycle Stages & Corollary Toolkit Sections[8]



Each concept in this toolkit includes a description of what it is and why it is important. Where possible, each section includes links to examples from other established groups as well as worksheets or group exercises derived from the authors' experiences. The examples focus primarily on, but are not limited to, collaboratives in which California State Parks has or is seeking to play a key role.

Tools in the **Collaborative Stewardship Starter & Builder Kit** are designed for the formation and early building stages. They are presented roughly in the order in which they are commonly used, although many are interrelated. The collaborative development process also tends to be somewhat iterative and varies among groups, so, while it is important to consider these tools in the sequence

[8] Collaborative performance (reflected on the y-axis) refers to both the group's how (functioning) and their what (outcomes).

presented, how they apply may vary. Given the dynamic nature of partnerships, parts of the process may also need to be revisited over time.

Tools in the **Collaborative Stewardship Sustainer Kit** are meant to support the later phases of organizational development. Many build upon earlier work, providing both structure and a road map for expanding what has already been done, operationalizing and maintaining key systems and processes, and developing additional resources.

Finally, the **Collaborative Stewardship Transition Kit** is designed for those that have met their intended purpose(s) or are considering changing how they work together, merging with other groups, or dissolving the partnership. These tools are intended to help determine critical questions, assess the path forward, and develop a road map of next steps.

It is important to note that **no single model works for every situation**. Every group's needs will vary based on its members, goals, design, and context. This toolkit is not a prescribed process, but rather, a starting point that can be adapted to fit specific circumstances.

Finding Your Place in This Toolkit[9]

Much like traditional organizations, collaboratives progress through a series of stages (Figure 1), each of which is described in this section, along with relevant insights and practical considerations. **The definitions and key activities listed under each stage in the table at the end of this section provide starting points for the most appropriate section—Starter & Builder, Sustainer, and/or Transition—to use.**

The collaborative life cycle illustrated in Figure 1 offers a pathway for understanding and managing a process that is characterized by both discrete and overlapping activities, challenges, and opportunities. Those seen in early stages differ from those that arise later. Time spent in each stage also varies widely and is influenced by available resources, clarity of purpose, internal relationships, and

[9] This section summarizes content about collaborative life cycle stages from a forthcoming paper, *The collaborative life cycle: A journey from start-up to renewal (or decline)* (Mickel & Farrell, 2026).

external factors. However, recognizing the characteristics of each stage can help groups intentionally adapt; thrive; and, when necessary, renew or conclude their work.

While a collaborative's development typically follows these stages, the progression is not necessarily linear, often moves back and forth, and the phases overlap.[10] It can also accelerate or stall along the curve in response to changing conditions or needs. While not all collaboratives are successful, recognizing that the process is dynamic can help partners navigate its ups and downs.

Understanding where a collaborative sits in its life cycle is essential because each stage carries different expectations, capacities, risks, and opportunities. The exploratory period before start-up, for example, is fundamentally about testing alignment, building trust, exploring emergent ideas, and assessing readiness—work that looks very different from the systems-creation of the building stage or the focus on performance in the sustaining stage. Understanding that collaboratives do not move through these stages in a linear fashion is equally important for calibrating expectations, workload, and resources. Groups may cycle back to earlier stages as conditions shift, new partners join, or foundational work needs to be revisited, and this is a normal and healthy part of adaptive collaboration.

Clarity about life cycle stage also helps partners anticipate what is coming next. A group in start-up can prepare for the heavier infrastructure needs of building; a sustaining collaborative can watch for early signals that renewal is needed; and a group approaching decline can make intentional choices about transition or closure. Recognizing this nonlinear progression helps partners avoid interpreting pauses or regressions as failure and instead see them as signals for recalibration, renewed investment, or strategic adjustment. In this way, life cycle awareness becomes a practical tool for ensuring that evolution happens with purpose rather than by accident.

Collaborative Life Cycle Stages

Before formally entering the start-up stage, potential partners often engage in speculative conversations, informal assessments, or shared projects to explore

[10] As noted by the shaded gradient between each toolkit section in Figure 1.

mutual interests, emerging opportunities, and readiness[11] to enter into collaboration. This important time of relationship-building and preliminary work is indicated in Figure 1 as the dotted blue line before the lifecycle stages begin. It serves as a period of *exploration and discovery* that helps partners determine whether a formal collaborative is worth pursuing, and if there is institutional interest, support, and commitment within their respective leadership for moving forward. It may unfold gradually over several years as relationships grow organically, or more quickly in response to new opportunities, shifting conditions, or urgent needs. **This collaborative readiness for organizations and individuals worksheet is designed to help interested potential partners make informed decisions about when and how to engage in this work.**

Below are the key characteristics of each life cycle stage. Table 1 below includes more detailed descriptions, and key activities and considerations for each stage.

Start-Up (Forming).[12] The start-up phase is characterized by the partnership's emergence and formation. Partners typically come together around a shared vision or common purpose, often in response to a pressing issue or opportunity. The focus is on laying the groundwork for joint action and developing foundational relationships and structures.

Building Stage.[13] The building stage involves strengthening, testing, adapting, and formalizing functions and processes. The group moves beyond initial agreements and focuses on implementing systems and strategies to achieve its goals. This is a period of active implementation and refinement of governance structures, decision-making, and collective approaches and priorities. Towards the end of this

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[11] Partnership readiness involves the willingness and ability of organizations and individuals to engage in collaborative efforts (Pretty & Ward, 2001). The "willingness" factor is the mutual intellectual stance that partnering is beneficial and necessary, and the "ability to partner" is the required institutional structures, support, and capacity for partnering (A. Mickel, personal comms, September 2023)

[12] The collaborative life-cycle framework assumes that partners have both a willingness and an ability to enter into collaboration.

[13] Activities and considerations in the early building stage are included in the Starter & Builder Kit, and the activities and consideration in the later building phase (specifically the sweet spot) are included in the Sustainer Kit.

stage, and into the sustaining stage is often where collaboratives find their performance sweet spot[14] (Figure 1).

Sustaining Stage. The sustaining stage is defined by stability and demonstrated effectiveness. The group has established strong systems, a shared identity, and a proven ability to deliver impact over time. It focuses on operationalizing functions and processes to achieve its goals.

Renewal (or Transition) Stage. The renewal stage occurs when a collaborative recognizes the need to significantly adapt some aspect(s) of its work to remain relevant and effective. It is marked by reflection, reassessment, and strategic renewal, often in response to changing internal and/or external needs, drivers, or relationship dynamics. As part of the renewal process, the group will often reenter the life cycle at the start-up and/or early building stages.

Decline (or Retirement) Stage. The decline stage occurs when a collaborative has achieved its objectives or its energy, resources, or alignment diminishes to the point that it is difficult to sustain meaningful collective action. This may result from waning participation, unclear direction, or loss of supporting structures.

[14] The "sweet spot" in the collaborative life cycle is where collective purpose, trust, and structured processes intersect to enable maximum performance, quality, and innovation. It is the inflection point where the collaboration moves beyond relationship building to achieving significant, tangible outcomes and impacts.

Table 1. Considerations & Key Activities for Each Lifecycle Stage.

START-UP STAGE	
Description: Focus is on formation around a shared vision or pressing issue. Focus is on building relationships, clarifying purpose, and establishing foundational structures. **Considerations:** No fixed timeline; may take months or years. Common challenges include building trust, clarifying value, and ensuring partner alignment. Collaboration with Tribal partners may require distinct approaches and resources.	**Key Activities:** • Identify need for collaboration and initial set of partners • Build trust through shared work and social connection • Garner organizational and leadership support and commitment • Define collective goals and outcomes • Explore governance structures and decision-making processes • Secure seed funding and other resources • Begin to formalize communication and coordination • Lay groundwork for collaborative and inclusive culture
BUILDING STAGE	
Description: Focus is on strengthening, testing, adapting, and formalizing functions, processes, and systems. It is a period of active implementation and refinement of governance, decision-making, and collective priorities. **Considerations:** Builds on start-up foundations and often requires revisiting early assumptions/ideas. Relationship and infrastructure building is accelerated. Synchronized activities and resources provide opportunities to test and refine goals, governance, and processes as membership grows.	**Key Activities:** • Formalize governance and shared decision-making • Clarify roles, develop accountability and coordination mechanisms • Launch joint or pilot initiatives • Expand membership and partnerships • Ask who is missing and ensure inclusive participation • Develop diversified and sustainable funding strategies • Establish internal communications and convening approaches • Refine priorities and shared norms

<table>
<tr><th colspan="2">SUSTAINING STAGE</th></tr>
<tr><td>Description:
Focus is on stability, effectiveness, and measurable impact as well as operationalizing functions and processes for optimal performance. Systems and shared identity are well established.

Considerations:
Emphasis shifts to execution, resilience, leadership succession, long-term sustainability, and adaptation. Institutionalizing infrastructure within partner organizations is critical for longevity.</td><td>Key Activities:
Scale impact, maintain momentum, and demonstrate track record
Secure durable funding to help ensure long-term resilience
Institutionalize partnerships and practices
Integrate collaborative approaches into existing systems
Adapt to internal and external change
Maintain continuous improvement
Embed inclusive norms into practices, policies, and effective onboarding procedures</td></tr>
<tr><th colspan="2">RENEWAL STAGE</th></tr>
<tr><td>Description:
Focus is on reassessing and adapting to remain relevant and effective. Marked by reflection, reassessment, and strategic renewal in response to changing needs, drivers, or relationship dynamics. It may reenter earlier life cycle stages.

Considerations:
Renewal may involve restructuring, merging, or concluding work. The process should be deliberate and strategic, potentially leading to revitalization or thoughtful dissolution.</td><td>Key Activities:
Revisit vision, value proposition, and shared goals
Conduct assessments to understand emerging needs
Redesign governance, membership, or operating structures
Introduce new strategies, priorities, or ways of working
Strengthen or rebuild partner relationships
Explore new funding models or partnerships</td></tr>
</table>

DECLINE STAGE	
Description: Occurs when energy, alignment, or resources diminish, or objectives have been achieved, making sustained collective action difficult. **Considerations:** Decline does not always mean dissolution. Collaboratives may sunset their work, stabilize, or transition. Closure should be intentional, respectful, and include knowledge transfer and celebration of accomplishments.	**Key Activities:** • Manage reduced engagement and leadership participation • Address unclear goals or roles • Navigate funding shortages or resource constraints • Address fragmented relationships or competing priorities • Coordinate knowledge transfer and closure (if dissolving)

Collaborative Stewardship Starter & Builder Kit

The Starter & Builder Kit is designed for groups in the forming-to-early-building stages described in Finding Your Place in This Toolkit. In this phase, partners are thinking about how to meet their shared interests and who might be involved. They often explore broad common goals as well as what they can do together that they cannot do individually. This is a time of emergence, relationship strengthening, and foundation building. As partners develop clarity around common interests and purposes, they begin to translate these elements into a collaborative design.

There is no activity more essential during the start-up stage than taking the time to build and strengthen trust,[15] relationships, and connectivity. This includes among partners, within partners' organizations, and with other interested parties such as community members. This step is essential for a highly functioning partnership; the group's outcomes and impacts are unlikely to be optimized or sustained without it (Mickel & Goldberg, 2018).

Lastly, the primary goal of this phase is to achieve alignment and a shared understanding on the group's purpose and how it will work together**; it is unrealistic to expect to immediately achieve high performance or tangible outcomes.**

[15] Trust is created by factors such as reliability, competence, honesty, transparency, being open to discussion, and benevolence.

Key Activities

Start-up/Forming	Building
• Identify the need for collaboration and select initial partners. • Build trust. • Garner organizational and leadership support and commitment. • Define collective goals and desired outcomes. • Explore governance structures and decision-making processes. • Secure seed funding or other resources. • Begin to formalize communication and coordination.	• Formalize governance and shared decision-making. • Develop clear roles, accountability, and coordination mechanisms. • Launch joint projects or pilot initiatives. • Expand membership and partnerships. • Develop funding strategies and build organizational capacity. • Establish internal communications and convening approaches. • Refine initial priorities.

Resources in this Kit

Section	Resources
Purpose, Vision, Mission & Goals	• Exercise - What Can We Do Better Together • Exercise - What Do We Have in Common in This Geography • Example - Mission, Vision & Purpose • Example - Problem Statement, Vision, Mission, Purpose & Functions • Examples - Values from Stewardship-based Partnerships • Example - Group Agreements • Exercise - Developing Partnership Values • Worksheet - Identifying Initial Collaborative Functions
Composition	• Resource – Cornerstones for Practicing Collaborative Leadership • Worksheet – Key Questions - Identifying Partners & Participants.docx
Governance Structure & Roles	**Internal Structure** • Example – Collaborative Structure Graphic • Worksheet - Considerations for Steering Committee Formation.docx **General Resources** • Worksheet – Governance, Agreements & Authorities • Resource – Authorities & Agreements with California State Parks Matrix **MOUs & Other Agreements** • Example – Collaborative MOU • Example – MOU to Implement California's Marine Protected Area Program

Section	Resources
	• Example – Co-Management Agreement with California State Parks • Example – Collaborative Cooperative Agreement • Example – Interagency Agreement (Resource Conservation District & State Parks) • Example – Memorandum of Mutual Understanding (North Coast Resource Partnership) **Charters** • Worksheet – Charter Components • Example – Steering Committee Charter • Example – Overarching Collaborative Charter & Working Group Charters
Decision-Making	• Resource – Consensus Process & Agreements
Strategy & Priority Setting	• Worksheet – Strategy & Priority Setting • Exercise – Coordination & Collaboration Activity • Example - One Tam Draft Project Selection Criteria • Worksheet – Project Prioritization Criteria • Example – Collaborative Annual Work Plan • Worksheet – Collaborative Annual Work Plan Template
Budget & Fundraising Processes	• Template – Collaborative Operations Budget • Template – Collaborative Fundraising Priorities & Tracker
Communications	• Example – Internal Collaborative Communication Processes & Agreements • Example – Collaborative Messaging Playbook • Example – Collaborative Branding Guidelines • Example – Brand Handbook

Section	Resources
	• Example – Media Guidelines
Tracking & Assessment	• Resource – Why Assess and Evaluate • Worksheet – Assessment & Evaluation Need Quick Check • Resource – What to Measure, How to Measure, and When to Measure • Resource – Partnership Impact Evaluation Guide • Exercise - Partner Capacity Assessment Template • Worksheets: Collaborative Readiness for Organizations and Individuals • Exercises - Decision-Maker Reach & Affiliations Templates • Worksheet – Life Cycle & Capacity Assessment Tool
Budget & Fundraising Infrastructure	• Worksheet - How to Choose the Right Fiscal Sponsor • Resource - Fiscal Sponsor Agreement Content • Resource - Fiscal Sponsorship Basics • Resource - Best Practices of Fiscal Sponsorship
Staffing	• Example – Collaborative Coordinator Position Description • Example – Collaborative Manager Position Description • Example – Collaborative Coordinator Work Plan • Template – Shared Staffing Organizational Roles & Responsibilities • Example – Coordinator Success Committee Charter.docx
Systems & Infrastructure	• Resource – CA State Parks Natural Resource Division Data Sharing Terms of Use • Example – Interagency Data Exchange Agreement

Section	Resources
	• Example – Online Protected Areas Training • Example – Online Calendar of Partner & Collaborative Events • Example – MOU for Shared Office Space
Collaborative Skills & Abilities	• Worksheet – Personal Practice Guide • Worksheet – Collaborative Leader Self Assessments • Worksheet – Notice Cornerstones Behaviors

Design

Like other types of organizations, collaboratives differ in their design, and there is no one “right” approach. Mickel and Farrell (2025a) identify the five design elements—**purpose, function(s), structure, composition, and processes**—that help illustrate important differences and similarities. The **Matrix of California-based Stewardship Collaboratives** illustrates how different groups have applied these elements and offers some specific examples that newly forming groups may find helpful.

The five design elements are central to understanding how and why a collaborative operates, and what it must sustain (or adapt) to achieve its desired goals. Effective design involves careful consideration of context and purpose, weighing trade-offs, and a good deal of iteration and adaptation. It is important to recognize that this can (and should) be a dynamic process (Texas Hill Country Conservation Network, 2017).

Purpose, Vision, Mission & Goals

Stewardship collaboratives are formed for many reasons, but **those that thrive are rooted in a common and clearly articulated purpose**. However, this can range from responding to an immediate specific need to a more general sense that there is benefit in working together on similar land-management issues.

Succinctly articulating a collaborative’s **purpose (or “why”) statement** is typically an iterative process that often begins with having a clear understanding of mutual interests and the value of working together. It should be based upon a shared and inclusive understanding of the opportunities, mandates, and/or challenges the group is focusing on. Once these are identified and clearly understood, it is easier to articulate the group’s purpose. [*Note: many revisit and refine their purpose statements throughout their starting and building phases*.]

A collaborative’s purpose is its North Star. It describes participants’ common interests and provides the basis for its collective action. This can be a well-worded sentence, but is more often a short paragraph that becomes increasingly refined as partners translate and test it by working together.

A **vision** statement[16] concisely articulates what will happen if they are successful in meeting their purpose. Ideally, it is not only aspirational and inspiring but also achievable. A vision that is too lofty or unrealistic can make participants feel like they are being asked to work toward something that will never happen.

The **mission** statement makes the vision actionable. While it is meant to serve as a road map, it should be concise; more detailed actions and timelines are reserved for work plans or similar documents that can be created later on.

Goals define more specifically what the group has come together to achieve. There can be as many or as few goal statements as necessary, but a list that is too long (i.e., more than roughly five or six) may start to feel unachievable or dilute the group's focus.

The purpose and goals statements are among the most fundamental things a collaborative needs to develop in its formative stages. They will help shape the work it takes on, how it is structured, who participates, and more. **The more well-defined and focused the shared purpose and goals are, the more members are likely to buy in, be committed, and work together successfully.**

The process of discussing and articulating the purpose, vision, mission, and goals is also valuable. It helps reveal assumptions, clear up misperceptions, crystallize ambiguities, and enable the partners to get on the same page about why they have come together. ***This step should not be skipped and it is worth dedicating sufficient time to do it well.***

The following exercises can be used to work through some of the topics discussed here. Examples have also been provided for reference and inspiration.

Activities & Resources:

- ★ Exercise - What Can We Do Better Together
- ★ Exercise - What Do We Have in Common in This Geography
- ◆ Example - Mission, Vision & Purpose
- ◆ Example - Problem Statement, Vision, Mission, Purpose & Functions

[16] Note: While many landscape collaboratives develop specific vision and/or mission statements, California's 14 seascape collaboratives do not have individual statements.

Values & Culture Setting

Like any other kind of organization, a collaborative can develop a certain culture or unique way of working together. This can emerge organically from the group's particular history, individual working styles, and/or the personalities of those involved. However, because how the people involved engage with each other and develop a culture of collaboration can make or break a partnership, it is also important to be intentional.

This starts with co-creating an agreed-upon set of guiding principles or shared beliefs, as well as behaviors that participants expect of themselves and others. Developing these early can help improve partner accountability and communication, plus articulate that culture and set expectations for those who may join later on. As with developing the purpose, goals, vision, and mission, the process of daylighting and discussing expectations around culture is also extremely valuable. The resources that follow provide examples of value statements and group agreements, as well as an exercise to help collaboratives develop their own.

Activities & Resources:

- ◆ Examples - Values from Stewardship-based Partnerships
- ◆ Example - Group Agreements
- ★ Exercise - Developing Partnership Values

Functions

Functions are the specific roles a collaborative fills to accomplish its purpose and goals (see earlier section). They may include capacity building, being a change agent, implementing projects, information exchange, and more. A group may choose to perform multiple functions or focus on just one; in any case, its functions tend to evolve over time.

The Identifying Initial Collaborative Functions Worksheet in the resources section below provides a structured approach for identifying the role(s) the group may fulfill in undertaking the kinds of work it hopes to do together, as well as what it has the capacity for. The **Matrix of California-based Stewardship Collaboratives** also provides the functions each group fulfills as examples. The following list[17] also includes the functions that land-/seascape stewardship collaboratives often assume for consideration.

- **Active land/water stewardship**. Undertake planning, design, compliance, implementation, monitoring, and adaptive management to advance shared work.
- **Advocacy and policy**. Inform decision-makers, shape public opinion, and drive change by influencing policy on relevant issues.
- **Capacity building**. Pursue and provide funding, staff, technical assistance, collaborative infrastructure, or other resources.
- **Affecting change (change agent)**. Advance innovative approaches and systemic changes to reduce barriers to stewardship work and to increase the efficiency/effectiveness of its outcomes, its planning and implementation, and its associated funding and administrative processes.
- **Connecting and coordinating**. Provide capacity (e.g., staff, funding) and forums to connect across organizations, agencies, Tribes, and community members to help build relationships, foster understanding, link partners to resources, and catalyze collective opportunities.
- **Engagement and education**. Lead or support community engagement, awareness-building, or campaigns that both inform and advance the partners' collective goals.
- **Information and learning exchange**. Provide resources, hubs, and peer-to-peer forums to exchange information, practices, and tools that support knowledge building, efficiencies, replicability, problem solving, and professional development.
- **Science and research**. Undertake inventory and monitoring; research; applied science; adaptive management; and associated data acquisition, management, and interpretation activities.

Activities & Resources:

[17] This list reflects the experiences of both California-based and approximately 100 collaboratives from across the country. Nevertheless, it is not exhaustive.

- Worksheet - Identifying Initial Collaborative Functions

Composition

There are many ways to determine a collaborative's partners, and no one formula will create the perfect size, mix of personalities and skills, and equitable representation. **However, its success can hinge on how the people who are involved work together.** It is therefore important to be strategic and as selective as possible when choosing partner organizations as well as individual members.

It is also important to consider that the initial group's composition can (and likely will) evolve. Some of this will be the result of natural attrition, staff changes, or a shift in priorities. But it should also be intentional. Partners may decide to begin with a limited focus and number of participants. Then, as the collaborative develops, it may become advantageous to build relationships with others. All of this takes time. How (or if) to engage others beyond a set of initial participants should be based on the perceived benefits and tradeoffs as well as the group's capacity to extend itself.

A collaborative commonly defines a set of **core members** who are essential to meeting its purpose. This may be by virtue of their ability to do mission-aligned work, contribute capacity or funding, or because they are resource managers/owners. **Collaborators, affiliate members, participants,** or a similar term may be used for others who are aligned with the group's work but are not critical to meeting its purpose or aren't able to fully participate. However, they may join subgroups; partner on specific projects; or stay informed through periodic email updates, virtual meetings, or in-person events open to a wider audience.

When considering overall composition, as well as which individuals to include as representatives for leadership roles and committees, Collaborating Consciously: The Four Cornerstones (Mickel, A. E., 2021) provides a good resource for understanding which behaviors foster collaboration and which ones discourage it.

The excerpted resource sheet also summarizes these behaviors. Documents like these can be used to illustrate desired behaviors and mindsets to others. The other linked worksheet includes important questions to consider when determining a collaborative's composition.

Activities & Resources:

- ✚ Resource – Cornerstones for Practicing Collaborative Leadership
- ■ Worksheet – Key Questions - Identifying Partners & Participants.docx

Governance Structure & Roles

Collaborative governance broadly refers to the **processes** by which a group sets up rules or guidelines so that partners know how to work together. It provides the basis for things like sharing decision-making power, coordinating activities, and agreeing on shared goals. It also helps partners understand how they participate and contribute.

Organizational, Tribal, or agency governance typically happens through boards, committees, institutional hierarchies, agreements, etc. However, in most situations, no such structures exist for newly forming groups[18]. Furthermore, there are no specific rules about how collaborative governance must look and there are many possible approaches. This presents a both the unique challenge of having to build something from the ground up, as well as an opportunity to create the governance system that works best for each group to meet its shared purpose and values.

In determining how much governance a collaborative needs, "only as much as is necessary to meet our purpose" is often a good starting point. The intent is to avoid adding layers of bureaucracy or inefficiencies to existing workloads. However, a collaborative does operate in many ways like an organization,[19] and as

[18] Joint Powers Authorities (JPAs) - a separate legal public agency created by two or more government entities, differ as they have an institutional hierarchy. JPAs have their own governing board, bylaws, budget, staff or contractors, and formal authority. While a JPA is legally an organization, it can also act like a collaborative if the member agencies share power and work together, but that depends on how they run it.

[19] Collaboratives meet the basic textbook definition of an organization: a consciously coordinated social unit, comprised of [sic] two or more people, that functions on a relatively coordinated basis to achieve a common goal or set of goals (Robbins & Judge, 2022).

such, needs enough governance (and structure) so that its members know how to work together.

Considerations for deciding on a governance model include the nature of the partnership, its purpose and goals, the level of control desired, liability concerns, and member autonomy. The optimal approach involves balancing the need for control, shared power, and consistency with the desire for flexibility as the collaborative evolves.

A key part of governance is its structure—the framework that enables a collaborative to operate. It sets out how decisions are made, how partners work together, and how accountability is maintained. It also clarifies roles, authorities, agreements, and the guiding documents that support the group's work.

The following are some of the components of a collaborative's structure that act as the foundation that makes governance possible.

- **Structural design.** The divisions or groupings of individuals and roles, such as a steering committee, technical advisory teams, or legal entities.
- **Roles and responsibilities.** Clear definitions of who does what, from communications to project management to on-the-ground implementation.
- **Agreements.** The rules, procedures, and bylaws governing the group (discussed in the Agreements & Authorities section).

Structure can be thought of at multiple scales.

Collaborative structures can take different forms, for example a decentralized network or a centralized hub. A network uses a broad, distributed approach where multiple parties coordinate through trust, relationships, and shared goals (Ehrlichman, 2021). A centralized hub, by contrast, concentrates coordination and decision-making and typically can act similar to a single entity. A Joint Powers Authority (JPA) is not a collaborative structure itself per se, but can support collaboration through partner agencies jointly exercising powers that they all have in common.

A collaborative's internal structural **design** can include a leadership and/or steering committee; subcommittees or working groups; or task forces.

Subcommittees or working groups can also often be sorted into categories (e.g., project management, research, outreach/communications) based on specific needs.

The nomenclature can be tailored to suit a partnership's needs and culture. For example, the term *executive team* may seem overly formal for some groups, while others may see it as a way to strategically identify those in charge. The one exception to this generality is that *working group* or *task force* implies that the group is focused on achieving a specific outcome, as opposed to, say, coming together purely for information sharing.

Clearly defined **roles**, especially related to decision-making or fiscal administration, for example, are critical. These provide the framework upon which trust and accountability are built. Ambiguity can lead to misunderstandings and conflict among partners. Charters (see Agreements & Authorities section) are frequently created to define the purpose, roles, and duration for different structural levels.

The examples of collaborative structure that follow provide models that can be adapted as needed. The worksheet offers a series of prompts useful for spurring discussion about design (e.g., the need for a steering committee or similar leadership team).

Activities & Resources:

Internal Structure

- Example – Collaborative Structure Graphic
- Worksheet – Considerations for Steering Committee Formation.docx

Agreements & Authorities

During the formation phase, partners develop the agreements and processes necessary to ensure its functionality. What is needed depends on what it is seeking to accomplish; what is required for partners to understand their responsibilities;

and what basic rules and systems they need to make decisions, stay coordinated, and follow through on commitments.

Governance agreements, which may take a variety of forms and names (see Appendix 4), can include the whole collaborative and/or be between individual organizations. They can formalize and record the group's purpose and functions; activities and processes; individual and shared authorities; and, in some cases, governance structure.

For example, the Giant Sequoia Lands Coalition's partners created a charter to codify their purpose, tenets, structure, composition (members and affiliate members), and processes. Additionally, a number of its partners have specific agreements among themselves (e.g., shared stewardship, master good neighbor, collection, and cooperating agreements).

For the purposes of this toolkit, **agreements** are voluntary, cooperative contracts made between parties (often landowners and governing bodies). **Authorities** are the legally binding powers that government agencies are granted for taking various types of action, including delegating certain management and operational authorities to other entities. Table 2 provides a high-level overview of the differences between agreements and authorities.

Table 2. High-level Summary of Differences[20]

	Agreement	**Authority**
Source	Agency, Tribe, and partner (contract)	Law/statute
Function	Executes action	Enables action
Nature	Partnership instrument (can be either legally or non-legally binding)	Legislative mandate
Duration	Time limited (e.g., up to 20 yrs)	Permanent or temporary

Appendix 4 includes a list of commonly used agreement types; each with the intended purpose, parties, and content. The Authorities & Agreements with

[20] Sources: Sovereign-to-Sovereign Cooperative Agreements, USDA Forest Service Cooperative Agreements, and Good Neighbor and Stewardship Agreements (Region 5)

California State Parks Matrix outlines the types of authorities often granted within each kind, specific to State Parks.

Choosing the right kind of agreement requires partners to understand which authorities and resources can be leveraged through them, which type(s) best fit the group's intended purpose, and who needs to be party and why. All partners can be signatories to some types of agreements (e.g., a charter), while others are only between individual partners. Examples of individual agreements often used to support collaborative landscape stewardship projects include:

- California State Parks and Resource Conservation Districts can hold interagency agreements to transfer funds to carry out resource management projects.
- California State Parks can establish a cooperative management agreement with a federal agency, such as the National Park Service, to collaborate on stewardship and science activities across jurisdictional boundaries.
- Qualified youth corps/youth-development organizations and certain Tribes can use a master agreement[21] external to the competitive bid process to carry out resource and facilities management as well as interpretive and educational work with California State Parks.

Most agreements typically take time and capacity to develop, with many requiring legal review. Partners should discuss the needs, merits, and expected workload required before starting the process, and establish clarity on which agreement type is required. During the start-up phase, partners often consider creating either a charter or MOU to codify their shared understanding about their desired outcomes, anticipated roles, and expectations about how they will work together.

Following is a worksheet to help guide partner discussions about what type(s) of agreements may be needed and the level of authority required based upon life-cycle stage, priorities, and anticipated activities. There are also a number of examples of different kinds of agreements. A worksheet that includes the sections commonly found in collaborative charters as well as some example charters are also included.

[21] This is authorized by Public Resources Code 5080.44 (Senate Bill 204 (2015)

Activities & Resources:

General Resources

- Worksheet – Governance, Agreements & Authorities
- Resource – Authorities & Agreements with California State Parks Matrix

MOUs & Other Agreements

- Example – Collaborative MOU
- Example – MOU to Implement California's Marine Protected Area Program
- Example – Co-Management Agreement with California State Parks
- Example – Collaborative Cooperative Agreement
- Example – Interagency Agreement (Resource Conservation District & State Parks)
- Example – Memorandum of Mutual Understanding (North Coast Resource Partnership)

Charters

- Worksheet – Charter Components
- Example – Steering Committee Charter
- Example – Overarching Collaborative Charter & Working Group Charters

Processes

Among other things, processes support how a collaborative makes decisions; shares information, data, and resources; develops its strategies, priorities, or work plans; and communicates internally and externally. The following section captures some of the more commonly utilized processes. It provides guidance for those in the start-up and building phases, as well as considerations for future phases.

Decision-Making Approach

A successful collaborative requires fair and transparent interactions among its partners. One way to accomplish this is to adopt clear and equitable decision-making processes (e.g., identifying a member or subset of members who make final decisions, or using majority vote or consensus-based models). Different approaches may also be deployed under different circumstances.

For example, decisions on topics where there is significant consensus or that are made by groups with high levels of trust may require a less formal process. Collaboratives where some subset are the landowners/managers or fiscal administrators may choose to have certain decisions made solely by the partners who have the ultimate responsibility. A majority vote can work in situations where a decision needs to be made quickly or when total agreement is less important. Consensus-based models may be better for more complex topics or groups, when there isn't a clear decision-maker, or when it is particularly important that each person has a chance to weigh in and express their concerns. Lastly, there may be situations where it is beneficial to have a neutral facilitator or third party to guide the decision-making process.

Regardless of the approach(es) used, a clear and transparent process is critical to helping prevent misunderstandings and conflicts about who gets to decide what, and how those decisions happen. Establishing this early on in the collaborative formation process is key, as there are—and will continue to be—many things that need to be decided.

During this start-up phase, group decisions tend to focus on things that help develop a foundation for future collaboration, such as establishing principles of engagement, clarifying shared interests and collective purpose, and defining roles. The process is often slow, requiring multiple conversations as partners build trust and psychological safety and even work through early conflicts.

The link that follows describes a consensus-based approach that has worked well, especially with groups of peers where there is no clear single decision maker.

Activities & Resources:

- Resource – Consensus Process & Agreements

Strategy & Priority Setting

Some groups are able to translate their purpose into clear priorities from the outset, while others rely on processes that allow them to emerge organically over time. In the start-up and early building stages it's often helpful to focus on both what can be done together (that cannot be accomplished individually) and what can best be accomplished by a subset of partners (that still has collective benefit).

During this process, organizing potential priorities by those that require cooperation between partners, those that require coordination, and those that require collaboration can indicate the level of effort and the capacities required to accomplish them. See the glossary for definitions of these often synonymously used terms. Similarly, creating shared project/program prioritization criteria can help identify early project implementation opportunities.

Regardless of the approach, the guiding questions in the worksheets linked in the Resources section below can be used to help shape the development of priorities as well as work plans. The examples provide a broad representation of various collaboratives' strategies, priority-setting documents, and work plans.

Activities & Resources:

- ■ Worksheet – Strategy & Priority Setting
- * Exercise – Coordination & Collaboration Activity
- ◆ Example - One Tam Draft Project Selection Criteria
- ■ Worksheet – Project Prioritization Criteria
- ◆ Example – Collaborative Annual Work Plan
- ■ Worksheet – Collaborative Annual Work Plan Template

Budgeting

Budgeting for a collaborative differs from that for an individual organization primarily in the complexity of governance, funding structure, and the need for alignment among the partners. While an individual organization focuses on its own mission and resource allocation, a collaborative focuses on collective needs, shared resources, and approval and decision-making processes across multiple independent partners.

Not all collaboratives develop and manage a budget that itemizes funds for their collective operations and activities. This is especially true in the beginning, where in-kind support, grants, or funding from one or two partners are often used to support the partnership and its work. This allows the group to begin to work together while building an understanding of the funding required to successfully resource their operations in the future.

When a collaborative does have a shared budget, it typically includes funds for both operations (e.g., coordinator, website, strategy-setting, convening, etc.) and activities (e.g., projects, outreach and engagement, data acquisition, etc.). Funds can be managed in multiple ways, depending on how the work is being accomplished, partner capacity, and the systems required for fund acquisition, management, and accounting. For example, for the collaborative as a whole, these activities are typically done by the backbone organization, fiscal sponsor, or a designated partner. These funds are often managed through a restricted account, with the collaborative’s leadership team providing guidance and approvals.

Other approaches include having the backbone organization hold operational funds, with project or program funding held by partners, or having designated partners hold funds for different operations and activities. Ultimately, the leadership team should determine the best approach, which can be adapted over time.

Regardless of the approach used, during this start-up and building phase, partners should clarify fiscal responsibility and roles, as well as what agreements (fundraising agreements, contracts, subgrants, etc.) are needed to enable the transfer of funds among partners to accomplish specific activities. This includes exploring and identifying line items that need to be accounted for in the overall budget and those should be represented in individual partner budgets. The template that follows provides line items are often included in a collaborative’s budget.

Activities & Resources:

- Template – Collaborative Operations Budget

Fundraising

Relative to individual organizations, funding a collaborative presents several unique challenges, including:

- Coordinating various sources.
- Simplifying funding transfer mechanisms between partners.
- Determining which funds are best sought by the collaborative versus by individual partners.
- Securing long-term, stable operational funding.

It also offers significant opportunities through leveraged resources, innovative financial models, and the potential for large-scale collective impact. **As with a successful business, the fundraising model should be diversified and tailored to the collaborative's specific purpose, function, priorities, and desired outcomes.**

During the formation phase, funding is often sought to:

- Coordinate the group's activities.
- Create its shared purpose, structure, governance, operations, and initial systems.
- Increase partner engagement and relations.

Fundraising for data acquisition and analysis; project identification and prioritization; and in some cases, implementation, often takes place. While occasionally a well-resourced partner(s) or in-kind contributions can be called upon, collaboratives typically find themselves in need of additional funding. This is especially true for smaller, community-based, or new groups that typically rely on in-kind support or existing funding and then use that to try get additional investments.

Fundraising requires being able to communicate and market the group's value proposition and anticipated outcomes and impact. Several (see **Matrix of California-based Stewardship Collaboratives**) have branded their collective identity to meet this need, as well as to build community support and increase partner organization affinity. Branding and related expectations about ownership and permissions should be discussed and then codified in governance documents.

Because the collaborative is often unproven during its early stages, funders tend to view it as higher risk. Until recently, funding for internal development and performance was perceived as separate from its ability to successfully implement, accelerate, scale, and/or sustain on-the-ground work. This put many in the difficult position of trying to separately source capacity-building support or operating without necessary resources to achieve their desired impact.

Evaluations of two grant programs (Mickel & Farrell, 2025b; Mickel, 2026) involving more than 100 collaboratives across the U.S. found that capacity through all life-cycle stages is essential for its performance and outcomes. These and other key findings from the two evaluations can be used to help provide a case for collaborative approaches and capacity funding.

The following are some of the funding sources from which collaboratives typically pursue to support both the on-the-ground outcomes and capacity.

- **Government grants.** Traditionally the largest source of stewardship and conservation funding, and sometimes challenging to administer, grants from public agencies support a range of activities, with a primary focus on project and program outcomes.
- **Philanthropic capital and donations.** These include grants and program-related investments from foundations, individuals, and corporations, which can be more flexible than public grants but harder to sustain. Some pooled funds aggregate philanthropic dollars for specific sectors, issues, or geographies, such as Donor Advised Funds.
- **Earned income/general funds.** This includes revenue generated by project or program activities (e.g., program or park entrance fees), or from operational, multiyear fund sources (e.g., government agency general operating funds).
- **Sales/property tax funds.** These are typically earmarked for a specific purpose, such as parks, stewardship, water conservation, or land acquisition; often require voter approval; and are time-bound.
- **NGO membership fees.** Dedicated fees can provide a reliable source of income that directly supports the organization’s mission as well as the collaborative’s purpose and activities.

- **Impact investments.** Financial returns from these types of investments are used to support social and environmental outcomes. This funding option is ideal for revenue-generating environmental projects such as forestry, renewable energy, sustainable agriculture, or carbon-offset initiatives.
- **Corporate partnerships.** Through these types of partnerships, businesses can support collaborative approaches and projects while enhancing their social responsibility brand. The partnerships need to be mutually beneficial, offering both positive brand visibility for the company and access to critical resources for the collaborative.

The template provided here identifies common fundraising needs as well as a tracker for documenting joint fundraising efforts.

Activities & Resources:

➡ Template – Collaborative Fundraising Priorities & Tracker

Communications (Internal/External)

Internal

Many developing collaboratives find that they need a way to organize files and communicate internally (e.g., sharing updates, documents, calendars). It is important to establish the processes and capacity to manage this early on. A myriad sharing platforms exist, and the challenge is often finding one that all partners can get permission to access. Therefore, it may be prudent to have the partner with the least restrictive IT requirements host shared files.

Some have found it beneficial to create an internal-facing webpage or intranet for calendaring meetings, sharing files, organizing convenings, and other needs. While this still requires selecting a file-sharing platform, basic information can be readily accessed by partners.

Regardless, it is important to understand access needs and security limitations prior to creating internal communication systems. Conversations with partners' leadership and IT should happen early on. (For more, see the Digital Communications section.)

External

Some collaboratives also engage in more outward-facing communications. However, this encompasses a wide range of activities that are often done by different people with a variety of skillsets. Consider, for example, differences among media/press, website development, social media, print materials, webinars, in-person events, educational programs, and visitor interpretation. It can be challenging to coordinate these disparate activities though one working group or a similar structure. Furthermore, each partner brings its own processes, policies, and preferences to how it communicates about itself.

The question, then, is how does the group communicate about its *shared* work. It is important to decide how to conduct these activities in a way that everyone can agree to and be comfortable with. It is critical to be clear about who needs to be involved in ***creating*** materials or programming, who needs to ***review*** them, and who needs to have final ***approval***. The answers to these questions may be different for outreach to different audiences (e.g., public vs. decision makers or funders), or for different topics. A number of groups (see **Matrix of California-based Stewardship Collaboratives**) have created external-facing websites that highlight their work, and in many cases include documents that capture their accomplishments, frequently asked questions, and goals.

Activities & Resources:

- Example – Internal Collaborative Communication Processes & Agreements
- Example – Collaborative Messaging Playbook
- Example – Collaborative Branding Guidelines
- Example – Brand Handbook
- Example – Media Guidelines

Tracking & Assessing Progress; Continuous Learning

Tracking and assessing activities and outcomes are crucial for ensuring accountability, transparency, and alignment with its purpose and priorities. Assessments can support grant applications and reports, communicating impact, and celebrating successes. They can also help identify challenges. For example, findings can illuminate things about the collaborative's overall health, help calibrate infrastructure or operational needs, or reveal if it is achieving its work plan goals.

Pulse assessments and impact evaluations however, do different things, and they work best together. **Pulse assessments focus on how things are going right now**, offering quick feedback that helps groups learn, adjust, and make everyday decisions. Impact or change-over-time **evaluations zoom out to look at longer-term results and trends**, helping show whether the work is really making a lasting difference. Together, they help collaboratives both improve along the way and clearly show the value of their efforts over time.

Assessments and evaluations should be matched to a collaborative's capacity. In the startup and early building stages, they should remain light and focused on learning. While it may seem too early for progress tracking, it is *not* too early to think about what would be beneficial to monitor over time and when is the right time to start. Having a baseline of where a group started can be helpful (or necessary) for demonstrating success—something funders often ask for. Also, because some groups spend a long time in the start-up and building stages, waiting until the sustaining stage to start tracking progress and learning from what's been done may be too late.

As the group transitions into sustaining stages, evaluations should become more rigorous as needed, while maintaining regular pulse checks to monitor the collaborative's health and capacity (see the What to Measure, How to Measure, and When to Measure in the resource section below for more information).

Collaboratives take different approaches to this work—some bring in outside consultants, others partner with local academic institutions, and some rely on their coordinator or a partner organization to facilitate them.

One example is having a coordinator or partner holding regular reviews of collective priorities to see what has been completed, what has been delayed (and why). This can be as simple as maintaining a table of projected annual activities and setting aside time during leadership team meetings to review and assess progress, discuss challenges, and adjust as needed.

For more information about impact evaluations see the Partnership Impact Evaluation Guide (Mickel & Goldberg, 2019) and the linked resource in the list below. This toolkit's References and Supplemental Resources sections also include information about tracking and measuring the progress, outcomes, performance and impacts of land-/seascape collaboratives.

The linked evaluation guide below offers useful resources to build, maintain, and sustain healthy partnerships and scale up their impact. The Why Assess and Evaluate, and What to Measure, How to Measure, and When to Measure resources provide key considerations. The Assessment and Evaluation Quick Check worksheet is designed to help initiate discussions around whether or not to do assessments and evaluations.

Activities & Resources:

- Resource – Why Assess and Evaluate
- Worksheet – Assessment & Evaluation Need Quick Check
- Resource – What to Measure, How to Measure, and When to Measure
- Resource – Partnership Impact Evaluation Guide

Capacities & Infrastructure

The design section above illustrates the kinds of questions and decisions collaboratives face as they form and grow—how to develop structures, make decisions, share work, and stay aligned. This section looks at the capacity and infrastructure that help groups operate smoothly and respond to the design challenges that come with the start-up and building stages.

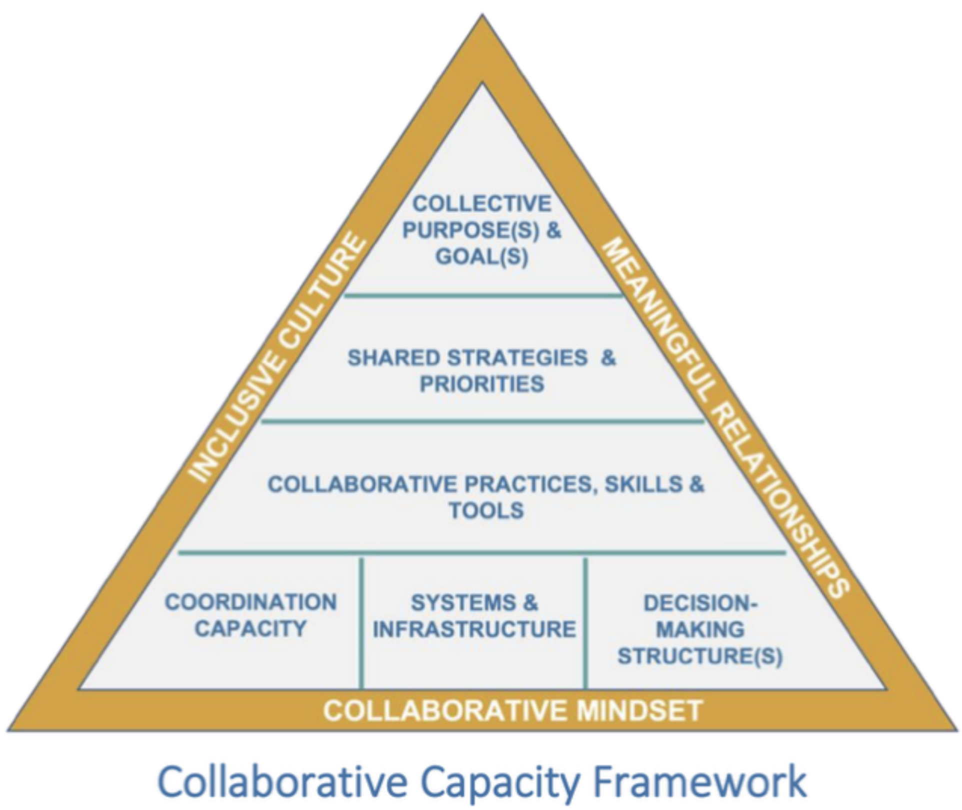
Introduction & Overview

An organization's capacity includes the staff, funding, systems, and other resources (e.g., communications, data, available skillsets) that enable it to perform. The same can be said of **a collaborative's ability to meet its collective purpose and achieve its desired outcomes.** In addition to the capacities that may already exist within individual partner organizations, the collaborative must be properly resourced for the partnership to perform well (Mickel & Farrell, 2025a).

The Collaborative Capacity Framework (deSilva et al., 2022) identifies nine key elements that can optimize performance, including six structural elements (see Figure 3 and Appendix 5). Three critical structural elements—**coordination capacity**, **systems and infrastructure, and collaborative skills and abilities**—are discussed in this section of the toolkit. (The remaining structural elements have been incorporated elsewhere in the toolkit.)

- Coordination capacity refers to basic staffing support and coordination, the glue that holds the partnership together.
- Systems and infrastructure include essential operational and communication frameworks that facilitate internal connectivity, alignment, and information flow.

Figure 2. Collaborative Capacity Framework



Meeting capacity needs (as represented in the orange triangle in Figure 2) enables collaborative activities and outcomes (blue square, Figure 3) that in turn generate collective impacts (green circle, Figure 3). Without capacity, it is very difficult to accomplish activities that generate impacts, and it is especially difficult to accelerate or even sustain those impacts (Mickel & Farrell, 2025a). Collaboratives must understand and then attend to critical capacity needs before they can expect to see results.

Figure 3. Generating Collaborative Impacts ™

Assessing Collaborative Capacity Needs

A collaborative can require myriad resources and capacities (e.g., funding, expertise, staff time, connections with other groups, physical infrastructure) to achieve its purpose and desired outcomes. The list of specific core capacities is unique to each group and may change over time. Nevertheless, early on, it is important to assess the individual partners' capacities; this will not only help the group understand what is possible with existing resources, but also, will identify gaps that can be strategically filled. Ultimately, regular review of what is needed to evolve and increase its functioning, performance, and quality over time is well worth the effort required.

Partner Capacity Assessment Tool

One way to quickly understand the various capacities that partners can contribute is to conduct a brief assessment. The following linked exercises are based on a template that includes some of the more common kinds of partnership capacities (e.g., expertise, stewardship activities, grant writing) as well as one for mapping affiliations with other groups and decision-makers.

Activities & Resources:

- ■ Worksheets: Collaborative Readiness for Organizations and Individuals
- * Exercise – Partner Capacity Assessment Template
- * Exercises – Decision-Maker Reach & Affiliations Templates

Life Cycle Capacity Assessment Tool

A different type of assessment involves considering which capacities are needed **within** a given life-cycle stage (e.g., continue to increase performance in the building stage toward maintaining the sweet spot) or **between** life-cycle stages (e.g., moving from start-up to building). The results can be used to create funding requests, budgets, strategies, and agreements as well as provide context and direction to both the backbone organization and leadership structure.

Activities & Resources:

- ■ Worksheet – Life Cycle & Capacity Assessment Tool

Backbone Support

Often, one agency or organization provides essential capacity. This **backbone** organization supports the group's ability to function. In some cases, the role is shared among different partners based on their individual capacities, missions, and technical abilities. This may be especially true if the collaborative consists of smaller organizations or volunteer groups with limited resources.

Depending on the kind of work a collaborative is doing and how it is structured, backbone support can include:

- fiscal administration (e.g., sponsorship, contracting, budgeting, philanthropic or individual fundraising, grants management);
- coordination capacity and/or project/program management;
- human resources oversight (e.g., hiring and supervisory roles, especially for shared positions);

- systems and digital infrastructure (e.g., GIS support, file and data management/sharing, web tools);
- physical infrastructure (e.g., tools, vehicles, office space, IT); and
- communications, marketing, media relations, and public affairs and engagement.

Another important distinction between California's landscape and seascape stewardship collaboratives is that the state's Marine Protected Areas Collaborative Network (MPACN) provides most capacity functions. MPACN's regional staff supports the infrastructure roles and needs included in this section, thus freeing the individual collaboratives to focus on the design and implementation of their project priorities, interpretive and education programs, engagement, and enforcement. Additionally, while each of the 14 seascape collaboratives began with a local fiscal administrator, some are transitioning that role to the MPACN.

Fiscal Sponsorship & Administration

While each partner agency or organization remains fiscally autonomous, with its own budgeting processes, policies, timelines, and rules, an entity that can legally receive and manage funding on behalf of the collaborative is also often needed. This is typically referred to as the fiscal sponsor or fiscal administrator.

A **fiscal sponsor** is generally a 501(c)(3) nonprofit[22] (e.g., land trusts, environmental nonprofits, etc.) that lends its tax-exempt status, legal oversight, and administrative infrastructure to the collaborative and its partners. On the other hand, a **fiscal administrator** provides financial management services—such as bookkeeping, invoicing, grant reporting, or fund disbursement—on behalf of a collaborative.

Unlike a fiscal sponsor, a fiscal administrator does not provide tax-exempt status or receive tax-deductible donations on the collaborative's behalf. Sponsors typically offer deeper oversight, and a formal legal relationship governed by IRS rules and established sponsorship models. (A sample fiscal sponsor agreement is

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[22] Resource Conservation Districts play fiscal sponsor roles for a number of California-based stewardship collaboratives. Academic institutions, Tribes, and local government agencies also play this role.

provided under the Resources header that follows.) The fiscal sponsor and/or administrator role can be (and often is) housed within the backbone organization.

During the starting and building stage of a collaborative's development, the leadership team assesses which backbone and financial functions are needed. This evaluation typically involves exploring which partner or entity might best fulfill the role, its existing capacities and infrastructure, what might be needed from the other partners, and what else is necessary (e.g., administrative fees, added staff capacity, increased liability insurance, expanded accounting systems) for them to provide this function.

Activities & Resources:

- ■ Worksheet – How to Choose the Right Fiscal Sponsor
- ✚ Resource – Fiscal Sponsor Agreement Content
- ✚ Resource – Fiscal Sponsorship Basics
- ✚ Resource – Best Practices of Fiscal Sponsorship

Staffing

This includes dedicated staff time and/or contracted services for essential coordination capacity as well as collective project, program, fundraising, communications, and administrative support. It can also include activities such as facilitation, meeting management, convening, progress tracking, project management, outreach and relationship building, and more. Among these, facilitation may sometimes be contracted to a third party in cases where there is a need for a specialized skill set or where a neutral "outside" perspective is helpful to resolve internal conflict.

Coordinators

Coordination support is critical. Emerging research and practice both point to the essential role that coordinators[23] play in a collaborative's ability to

[23] This Toolkit uses the term "Coordinator" to refer to the dedicated staffing that provides this capacity, which is essential for the collaborative to perform. This position may be called many things, from coordinator to network/partnership manager, to director, and more. The titles sometimes reflect the different levels of complexity, strategy and oversight held by the position.

successfully achieve its desired outcomes. This role is usually filled through one or more dedicated positions (or contractors), depending on the group's size, scope, and structure. It can be fulfilled through the backbone organization or undertaken by a partner.

Coordinators do not "run" the group, per se. Rather, they are both the glue that holds the partnership together, tracking activities and commitments, and moving the collaborative's work forward. In addition to coordinating and maintaining a partnership's processes and making sure its parts are connected, their duties may include budget tracking or supporting communications/outreach. Or, depending on the collaborative's needs, they may fill more technical project-management and outreach roles.

Often, this position is seen as primarily administrative or focused on "cat herding" the group. In truth, it requires a deep understanding of the group's purpose and goals and fairly sophisticated strategic leadership and relationship-management skills to help them get there—especially in larger or more complicated partnerships.

The coordinator's work plan is often co-created by the coordinator, their supervisor, and the partners (or a subset thereof). Coordinating a fully functioning partnership is usually a full-time job, especially if the group is tackling diverse work and/or has multiple levels of governance structure. Therefore, it is not realistic to expect partners to take on this role on top of their regular workloads.

Sample coordinator position descriptions and work plans are included here for ideas of what each might include.

Activities & Resources:

- Example – Collaborative Coordinator Position Description
- Example – Collaborative Manager Position Description
- Example – Collaborative Coordinator Work Plan

Shared Positions

Although there are many models to create shared positions, the most common is hiring staff or contractors through the backbone organization. That entity may fully manage these positions, or may just fulfill legal administrative responsibilities (e.g., supervision, performance management, compensation adjustments, contract oversight), with partners providing technical direction and work plan input. As such, many coordinators and other shared staff find themselves in the unique role of technically working for one organization while functionally fulfilling the group's collective needs.

Regardless of the approach, a clear understanding of the legal and administrative role(s) of the hiring organization and the technical and supporting role(s) of the partners is essential. (The template that follows provides a tool that has been used by some collaboratives and can be modified as needed.)

Hiring can be managed in a variety of ways, depending on things like the level of involvement partners want to have and their capacity to participate in the process. One approach that has worked well is to jointly develop a scope of work or position description, which the organization or agency doing the hiring then uses in conjunction with their usual standards and policies. Some subset of the partnership (three to four members) act as a hiring committee, reviewing applications, selecting candidates for interviews, conducting interviews, and making a recommendation on the final candidate. However, the ultimate decision lies with the entity legally and administratively doing the hiring.

Similarly, supporting the success of shared staff can be managed in different ways. People in this role can sometimes find it challenging to know where to look for direction or who ask questions or get feedback from. One approach that has worked well is to **establish a small success committee (two to four people)**. This group meets regularly with shared staff members to provide a centralized point for the guidance and support that staff members need. The success committee also often works in partnership with the collaborative's steering committee (or other governing body) and partners to share feedback and provide updates.

The template linked below includes details about the way a shared position can be managed across the hiring organization, the direct supervisor, the collaborative, and the success committee. There is also an example of a success committee charter that describes some common roles for those groups.

Resources

- ➡ Template – Shared Staffing Organizational Roles & Responsibilities
- ◆ Example – Coordinator Success Committee Charter.docx

Systems & Infrastructure

Basic intra-collaborative structures facilitate internal connectivity, alignment, decision-making, information flow, and coordinated action. These include:

- fiscal management,
- technical services and other support to meet project/program needs,
- digital communication platforms,
- reporting and tracking tools, and
- data-sharing systems.

Data-Sharing

Sharing data among partners can be difficult at best, and at times, can seem like an insurmountable challenge. Not specific to land-/seascape collaboratives, it is a common challenge for most cross-boundary and -sector initiatives. The best approach typically depends on data type, ownership, and sensitivity; the purpose for sharing; and approvals needed to access a data-sharing platform. In addition to policies that drive approvals for data sharing, there are financial and infrastructural constraints that should be considered when choosing a platform, protocol, and access framework.

Many groups need or want to share following types of data and digital assets, each of which is important for coordination; project planning, prioritization, and implementation; grant reporting; and other shared endeavors:

- geospatial data
- tabular and raw data
- databases and other software platforms
- documents and other files
- photos and videos

The platform should be selected once the scope and type of data sharing is agreed upon, either informally or through a formal agreement. The best approach can vary based on the type of data; the number of partners; and the desired scope of modeling, analysis, and reporting. For example, groups can centralize geospatial data through a GIS enterprise hosted by the backbone organization or another partner. Alternatively, a number of stewardship collaboratives have contracted with third-party hosts for data storage and analysis.

Statewide data repositories and databases such as CalFlora's Weed Manager,[24] the Wildfire Task Force's Interagency Treatment Dashboard,[25] and Pacific Veg Map's Land Cover and Fuels Data[26] also serve as platforms for storing partner data in ways that allows it to be analyzed across boundaries.

Tabular and raw data and documents are often housed within Microsoft SharePoint, Google Documents, Box, or other platforms that can be more easily accessed and approved by partners. Many collaboratives begin sharing these types of data during the forming and building stages. These systems will evolve as more data are collected and as collaboration or projects become more mature or complex.

As with most data, many partners have specific metadata; terms-of-use instructions; and, in some cases, release forms (e.g., photo-release waivers) that should be reviewed prior to placing data into a shared platform.

[24] A subscription-based system used by agencies and organizations across California to map, track treatments and change over time, and create customized reports on invasive plant infestations.

[25] A public online tool created by California's Wildfire and Forest Resilience Task Force to map and monitor wildfire prevention work (prescribed burns, thinning, tree planting) across the state and to align efforts among state, federal, Tribal, and private groups working to build healthier forests and safer communities.

[26] Hosted by a third party (Tuckman Geospatial) and providing access to fine-scale vegetation, topographic, wildland fuels, and other mapping data for a growing number of California counties. Much of the data was generated through projects managed in partnership with stewardship collaboratives.

Activities & Resources:

- ✚ Resource – CA State Parks Natural Resource Division Data Sharing Terms of Use
- ◆ Example – Interagency Data Exchange Agreement

Digital Communications

As described in the Internal Communications section, many collaboratives start by identifying their internal communications needs and goals and then determining the digital infrastructure best suited to meeting them. This often includes having a dedicated virtual communications platform; a file-sharing and -storage platform for meeting notes and shared documents (see previous discussion); a dedicated email address and calendar; and, in some cases, a web-based intranet. Key considerations include who hosts the group's platforms, who needs access to which files and platforms and how that is facilitated, and who manages both access and file systems.

The following examples illustrate how a statewide group is using a digital platform to offer online trainings, and a regional one is using its website to organize and promote events.

Activities & Resources:

- ◆ Example – Online Protected Areas Training
- ◆ Example – Online Calendar of Partner & Collaborative Events

Financial Management & Accounting

As previously referenced in the Fiscal Sponsorship & Administration section, land-/seascape stewardship collaboratives typically establish clear and transparent financial accounting systems through their backbone organization or fiscal sponsor/administrator. These are often nonprofit organizations, resource conservation districts that function much like nonprofits, and/or Tribes. The fiscal management systems they tend to utilize include the following key considerations:

- **Scalability and adaptability**. Systems must fit unique collaborative structures, potentially blending traditional accounting with new reporting standards.
- **Centralized management**. Standardized financial and accounting practices and reporting are used to manage pooled funds (e.g., grants, private dollars) and distribute them to partners.
- **Fund accounting and grant management**. Systems are established to track restricted vs. unrestricted funds, grant-specific expenditures, and reporting for diverse funders (e.g., federal, state, private).
- **Platform-based tracking**. Digital tools (e.g., shared cloud-accounting software) are used for transparent fund tracking across partners. This is especially common in well-developed collaboratives that have attained the sweet-spot stage (see Figure 1).
- **Agreements.** Formal documentation that allows resource sharing among partners, collective fundraising, branding, etc. Necessary agreements will vary based on partner requirements.
- **Financial stewardship and transparency**. Systems that support clear, timely reporting for public accountability and linking investments to activities, outcomes, and overall performance.

It is important to note that managing funds across multiple partners may require new skills, tools, and legal review, particularly for fiscal sponsors accustomed to managing only their own organizational budgets. Getting the right systems and processes in place may require new skill sets, expanded or new tools, or new ways of thinking, all of which can take time, additional capacity, and likely legal review to develop. (The **Matrix of California-based Stewardship Collaboratives** includes notes on the funding model each group uses. It may be beneficial to see who else has taken a similar approach and reach out to them.)

Physical Infrastructure

One of the often-cited benefits of working collaboratively is the ability to share resources, equipment, and tools. Any partner can provide shared office space, computer equipment and software, vehicles, tools, and supplies; partners frequently share the cost of purchasing new resources. At times, it can be helpful or even necessary to have agreements in place to clarify ownership, access, fees, and any liabilities associated with such resource sharing. This can be especially true for shared office space and vehicle use.

The following example shows how such agreements can be structured.

Activities & Resources:

- Example – MOU for Shared Office Space

Collaborative Skills & Abilities

Collaboration fundamentally depends on relationships among people that span organizations or boundaries, outside the hierarchy of any one group. This requires a unique interpersonal skill set that includes listening, humility, empathy, a willingness to experiment, patience (to discover points of mutual interest), and tolerance for a process that is likely more ambiguous (and often less controllable) than one might be used to (Anklam et al., 2026).

As noted in *Collaborating Consciously: The Four Cornerstones* (Mickel, 2021), certain behaviors are especially foundational: compassion, character, courage, and commitment. Building the knowledge and skills that support these strengthens leadership at every level and is essential for success.

Similarly, because collaboration is itself a process, effective process design and delivery skills are especially critical. This includes facilitation, mediation, mutual-gains negotiation, conflict resolution/conflict wisdom, evaluation, and problem-solving (Johnson et. al., 2021).

As landscape-scale collaboratives are becoming more and more common, there is a growing need for trainings and professional development to deepen interpersonal skills and build confidence for those doing this work. This need is being filled in part by regional and statewide peer learning and exchange forums,[27] which are

[27] For example, the California Landscape Stewardship Network hosts a bi-monthly peer exchange and learning forum for collaborative coordinators, the Sierra Institute holds regional exchanges through its SCALE program, and the University of Montana facilitates a collaborative-leaders-cohort-based program for California State Parks managers.

crucial to empowering and supporting conservation practitioners engaged in collaborations.

Learning and exchange among peers are rapidly being recognized as essential for sharing practices and resources, as well as innovating solutions for the complex problems they face (Navalkha, et al., 2021). This need is also being met by some agencies that are either developing and/or participating in collaborative leadership training programs. For example, in 2003 and 2005, California State Parks piloted a customized a training workshop for leadership and staff focused on collaborative leadership skills development as well as on building and strengthening core skills and abilities (unpublished internal training materials).

While these skills benefit everyone involved, they are especially critical for coordinators[28]; investing in their professional development can have a multiplier effect on the group's functioning and performance. This can be augmented through a success committee, participation in peer-learning exchanges, and training.

Collaborative approaches generate their own culture, one that is malleable and ever-evolving but that also requires both attention and intention. By fostering opportunities for training and development during all life-cycle stages, staff continuity, partners' adoption of a collaborative mindset, and professional satisfaction are more likely.

The following worksheets can be used to evaluate various aspects of individual leadership skills. The Supplemental Resources section of this toolkit also has training guides, papers, and other materials related to developing these skill sets.

Activities & Resources:

- Worksheet – Personal Practice Guide
- Worksheet – Collaborative Leader Self Assessments
- Worksheet – Notice Cornerstones Behaviors

[28] Regional coordinators' knowledge, training, and ongoing leadership are foundational to unlocking greater efficiencies and scaled up landscape stewardship benefits (deSilva et al., 2022).

Regional, State & National Capacity Support

Across California and beyond, a growing set of regional, statewide, and national groups are helping place-based collaboratives work more efficiently and effectively. At the regional scale, the Sierra Institute's Sierra to California All Lands Enhancement (SCALE) program helps strengthen collaboratives' performance by convening them, building shared capacity, and advancing solutions to common barriers in forest and watershed stewardship. SCALE creates a space where groups can learn from one another, align around shared challenges, and elevate issues that require regional or statewide attention—reducing duplication and helping local groups focus more fully on their on-the-ground work.

At the statewide level, the California Landscape Stewardship Network and the Marine Protected Areas Collaborative Network provide coordination, tools, and communities of practice that connect place-based collaboratives across diverse geographies and missions. These networks offer strategic facilitation, peer learning, communications support, and policy alignment that help local collaboratives navigate governance, funding, partnership health, and technical challenges. By linking local efforts into broader statewide systems, they expand connectivity, amplify local voices, and accelerate the spread of best practices.

The Stewardship Network (TSN) is an example of how a national group can create shared services and digital infrastructure to increase efficiencies. TSN provides volunteer management platforms, training, technical assistance, and a national community of practice that reduces administrative burden and supports consistent, high-quality stewardship.

Together, these regional, statewide, and national entities form a supportive network of tools to help strengthen place-based collaboratives across all life-cycle stages—enabling partners to learn from one another while focusing their energy where it matters most: caring for the landscapes and communities they serve.

Collaborative Stewardship Sustainer Kit

This part of the toolkit is designed for collaboratives that have moved through their forming and early building stages into the later building and sustaining stages (Figure 1). During this period, there is typically a shift in focus to:

- Refining and maintaining strong systems and partnership momentum.
- Implementing and possibly scaling up work.
- Institutionalizing relationships, partnerships, and practices.
  - Ongoing management, adaptation, and continuous value creation.

It is worth noting that collaboratives generally perform best from the end of the building stage through the sustaining stage, the sweet spot of impact and effectiveness.

Nothing in collaborative work is more certain than the need to continually adapt and change. Ideally, partners regularly think ahead to impending influences (both internal and external) that point to the need for change before they happen. This requires being adaptable while also maintaining core structures, functions, and relationships.

This more mature stage often calls for a focus on both tangible outcomes as well as the social dimensions essential for keeping the collaborative's culture strong. The group may also consider taking on new roles. This can prompt questions such as "What more can we achieve together?" and "Should we maintain the status quo, or should we broaden our purpose?" Answering these questions requires a solid shared understanding of its role; intentional and inclusive decision-making; and, often, an assessment of its capacity to do more or work differently.

The tools and resources provided in this section of the toolkit build upon the foundational content (types of agreements, funding sources, etc.) of the **Collaborative Stewardship Starter & Builder Kit** and are similarly organized.

Key Activities

- Maintain momentum and scale-up impact.
- Ensure long-term resilience and adaptability.
- Demonstrate a track record of collective action and outcomes.
- Institutionalize partnerships and secure durable funding.
- Integrate collaborative practices into broader organizational systems and policies.
- Expand engagement and knowledge sharing.
- Adapt systems in response to internal and external changes.

Resources in this Kit

Section	Resources
Purpose, Values, & Functions	• Exercise – Assessing & Modifying a Collaborative's Purpose • Examples – Values from Stewardship-based Partnerships.pdf • Example – Group Agreements.pdf • Exercise – Developing Partnership Values.docx • Exercise – Assessing & Modifying Collaborative Functions
Composition	• Exercise – Assessing & Modifying a Collaborative's Composition • Resources – Succession Planning for Nonprofits/ Managing Leadership Transitions • Worksheet – Succession Plan Checklist for Governance Roles • Template – Succession Planning Memo

Section	Resources
Structure, Governance & Roles	• Exercise – Assessing & Modifying a Collaborative's Structure & Governance • Worksheet – Mapping Collaborative Agreements & Authorities
Processes	• Resource – North Coast Resource Partnership Policies & Procedures Handbook
Strategy & Priority Setting	• Worksheet – Scenario Planning for Strategic Priority Setting • Worksheet – Exploring & Finding Project Themes • Example – Regional Action Plan (LCWP) • Example – Regional Plan & Actionable Strategies (NCRP) • Example – Strategy & Framework for Resilience (TCSI) • Example – Regional Project Plan (SD County) • Example – 5-Year Regional Strategy (One Tam) • Example – 10-Year Regional Plan (TCSI) • Example – Envision the Choptank – Common Agenda
Budget & Fundraising	• Example – Redwoods Rising: Healing the Landscape Together (2023-2027) • Example – Conserving and Restoring Tallgrass Prairie Business Plan (draft), Prairie Coteau, South Dakota and Minnesota

Section	Resources
Communications & Tracking	• Example: Collaborative Annual Report (Lancaster Clean Water Partners) • Example: Redwoods Rising Frequently Asked Questions (FAQs) • Example – Internal Collaborative Communication Processes & Agreements • Example – Collaborative Messaging Playbook • Example – Collaborative Branding Guidelines • Example – Brand Handbook • Example – Media Guidelines • Resource – Why Assess and Evaluate • Resource – What to Measure
Capacity & Infrastructure	• Worksheet – Periodic Organizational Capacity Check-in

Design

As noted throughout this toolkit, change is a natural part of a collaborative's evolution and offers important opportunities to think strategically, not only about what the group is doing and why, but who should be involved, how it is structured, opportunities for additional engagement or fundraising based on new avenues of work, and more. The collaborative design elements discussed in this section are interrelated and should be assessed and adapted together.

Purpose(s)

New internal or external challenges or opportunities may arise as a collaborative matures, achieves its initial goals, or the environments in which it is working shift. This may come in the form of new participants asking fresh questions or offering novel perspectives. Or, the group may deliberately choose to shift its focus, for example, from project-based initiatives to achieving systemic change by addressing underlying structures, policies, or cultural conditions.

In response, partners might decide to either maintain the group's purpose or adapt it to address emergent needs and ensure the continuation of its collective impact. This can happen slowly as the partners work together over time, or rapidly in response to something more urgent. Regardless, any evolution of a collaborative's purpose can be done with intention.

This stage also represents a unique opportunity to see how/if the original purpose has been integrated into individual partner organizations and how invested those organizations are in continuing to support this work.

The discussion prompts and questions in the following linked exercise are designed to help explore whether to modify or evolve a collaborative's purpose.

Activities & Resources:

- Exercise – Assessing & Modifying a Collaborative's Purpose

Values, Principles & Culture Setting

Whether a collaborative maintains or changes its purpose, stays focused within its original geography, or scales-up its work, its values and guiding principles must remain aligned, relevant, and consistent with its desired culture. A disconnect between purpose and values can lead to mission drift, loss of partner trust, and reduced operational effectiveness.

A collaborative in this phase has developed a culture of its own, one that has had to be dynamic and adaptive over time. Mature collaboratives benefit from partners having both history and demonstrated experience working together. At this point, behaviors and norms have been established, either explicitly or implicitly. Just as partners seek to maintain momentum and operationalize systems and activities during the sustaining stage, the same effort is required for tending to behavioral norms, culture, and values.

Examples of how some of the groups listed in the **Matrix of California-based Stewardship Collaboratives** have sustained and strengthened their culture include:

- modeling collaborative leadership through open dialogue and trust building;
- creating spaces that foster creativity, transparency, partner inclusivity, and a shared language;
- routinely celebrating successes both with partners and with broader audiences;
- openly acknowledging setbacks, learning from mistakes, and working through challenges;
- consistently honoring partner contributions;
- embedding collaborative practices into everyday activities;
- addressing interpersonal problems; and
- intentionally maintaining the conditions, incentives, and structures that support ongoing joint work.

It may be worth periodically revisiting some of the examples or doing a modified version of the exercise shared in the **Collaborative Stewardship Starter & Builder Kit** (and included again here), especially if the group has shifted its purpose, had membership turnover, or is experiencing challenges working together that would benefit from a structured discussion about shared values and culture.

Activities & Resources:

- ◆ Examples – Values from Stewardship-based Partnerships.pdf
- ◆ Example – Group Agreements.pdf
- ★ Exercise – Developing Partnership Values.docx

Function(s)

As described in the **Collaborative Stewardship Starter & Builder Kit**, functions are specific roles the group fills to accomplish its purpose and collective goals within its broader socio-environmental system. As a collaborative matures, it can either operationalize those functions with the necessary capacities and processes or reevaluate them if there is a shift in its purpose, strategic priorities, etc.

For example, a group may evolve from implementing conservation and stewardship projects to also improving the practices, regulations, and policies guiding that work. This would expand its functions from *active land/water stewardship* to *change agent*, with a related broadening of its activities and capacities. The nature and degree of partner participation and composition could also be affected, as could how the collaborative is perceived by others.

The discussion prompts and questions in the following linked exercise are designed to help explore whether to modify or evolve a collaborative's functions.

Activities & Resources:

- ★ Exercise – Assessing & Modifying Collaborative Functions

Composition

From the beginning, participation should be based on who needs to be involved (and in what capacity) to meet the group's shared purpose, functions, and goals. As the group evolves and matures, adding partners often becomes a more strategic and expansive exercise (e.g., seeking new perspectives, relevance, representation, and capacities across sectors, geographies, focal areas, and gaps). Changes in participation may arise organically as a result of partner organization staffing shifts (e.g., job changes, retirement) or may be intentional (e.g., new partner perspectives or capacities are needed, or opportunities arise to include an organization that was not previously able to participate). Managing participation is typically an ongoing and iterative process based on the group's projects and priorities.

As collaboratives mature, there is also benefit in periodically examining the participation of existing partners. Over time, some may double down on their engagement and commitment, even seeking new opportunities and added responsibilities. Others, however, may become fatigued; reduce their participation based on other commitments; feel they have met their initial goals and expectations; or perhaps no longer have a sense of belonging, contribution, or connection to the collaborative's culture. **Being watchful for signs of partner fatigue early on, and intervening as appropriate, can help ensure that participants stay engaged, or that any transitions are done with intention rather than reactively.**

Additionally, characteristics of participants in the early life cycle stages can differ from those who engage in its more mature stage. For example, partners in the formation stage are often focused on creating the vision and building trust, while partners in the sustaining stage tend to concentrate on operationalizing processes, adapting to change, and reinforcing existing relationships to ensure longevity.

Regardless, it is helpful to remain aware of key indicators that signal fatigue or other issues (see Tracking & Assessing Progress; Continuous Learning). Reduced participation, loss of trust, lack of interest and commitment, and expressions of being overwhelmed by communication and collaborative processes suggest concerns that may need to be addressed.

Succession planning is another key consideration. This is crucial because it builds continuity, minimizes disruption, and preserves vital institutional knowledge. It also supports making transitions managed events rather than sudden emergencies. Creating a succession plan, especially for key leadership roles, helps mitigate this, plus helps create and maintain a pipeline of future leaders.

Several stewardship collaboratives have also developed transition guidelines for key leadership roles within their group, including having the departing leader prepare a memorandum for their successor. The content of this memo typically includes a summary of commitments made, expectations for maintaining momentum and impact, and roles and responsibilities the departing leader recommends their successor undertake.

Periodic evaluation of who is and who should be part of the collaborative, as well as their levels of participation, commitment, and satisfaction, is recommended. The discussion prompts and questions in the following linked exercise are designed to help explore whether to modify or evolve a group's composition. Many of these discussion prompts and questions could also be integrated into tracking and assessment tools.

Activities & Resources:

- Exercise – Assessing & Modifying a Collaborative's Composition
- Resources – Succession Planning for Nonprofits/ Managing Leadership Transitions
- Worksheet – Succession Plan Checklist for Governance Roles
- Template – Succession Planning Memo

Structure, Governance & Roles

It is not unusual for a collaborative to change aspects of its governance framework after the start-up stage or a couple of years of operation. Collaborative governance is a developmental, operational, and often legal process. During the start-up or entrepreneurial period, the structures needed may be simpler, more flexible and emergent, or less defined than what is needed as the group develops (National Policy Consensus Center & Hatfield, 2020).

While earlier life-cycle stages involve creating the foundation, the sustaining stage is likely to involve a shift toward more formalized and/or specialized structures. Accountability and transparency measures may peak during this time, often requiring more robust systems and infrastructure; in some cases, transitions from a less formal structure to a formal one such as a nonprofit or joint powers authority may be needed.

Leadership typically becomes distributed across partners and is increasingly supported by dedicated coordinators or other staff, which ensures continuity and responsiveness. During this stage, formalizing roles, documenting responsibilities, and developing procedures for managing turnover help preserve institutional memory and provide stability (Karam et al., 2025).

The components (and, in some cases, the roles) of the internal governance structure also evolve. The leadership committee typically operates at a more strategic and systems level, and working groups oversee the operations, projects, and programs. New groups may be established, and no-longer-relevant groups may dissolve. Task forces are often created to address discreet time-bound needs (e.g., updating strategic priorities, designing specific projects, exploring and assessing new opportunities, developing new internal systems).

The discussion prompts and questions in the following linked exercise are designed to help explore whether to modify a collaborative's governance processes and structure based upon how its circumstances, purposes, and functions have evolved.

Activities & Resources:

* Exercise – Assessing & Modifying a Collaborative's Structure & Governance

Periodic Governance Agreements & Authorities Review

Agreements should focus on achieving clear, mutually understood terms and objectives and be responsive to anticipated and emerging issues. The duration of these agreements can vary widely. Memoranda of understanding and similar agreements can last several decades, whereas charters should be reviewed annually.

Agreements should also undergo periodic review to ensure that they are meeting the collaborative's goals and are they flexible enough to adapt to new social or environmental conditions. The review process provides an important opportunity for partners to discuss and reaffirm their commitment to the work, and to adapt the terms if needed.

Several triggers can prompt review and potential modification of existing agreements, and/or creating new types of agreements. These include, but not limited to:

- changes to the collaborative's design (e.g., purpose, composition)
- changes to partner roles, responsibilities, and/or authorities
- pursuit of additional types of projects and programs (e.g., different sectors, scales, complexity)
- allocation and disbursement of funds between partners
- changes in the level of operational and financial risk and exposure among partners
- changes in access and ability to perform activities on partner lands or with partner resources
- changes in government administrations and/or key policies
- expiration of the existing agreement's term

The discussion prompts and questions listed under the Governance Agreements & Authorities section of the **Collaborative Stewardship Starter & Builder Kit** can also be used during the sustaining stage to guide discussions about whether existing agreements should be modified or retired; if new agreements and authorities are needed; and, if so, the most suitable timeframe and agreement type.

Activities & Resources:

- Worksheet – Mapping Collaborative Agreements & Authorities

Processes

Institutionalizing collaborative processes helps ensure that the group's operations and functions persist beyond the initial partners and individual leaders. This step typically occurs in the sustaining phase. It includes testing, adapting, and operationalizing processes related to how the group makes decisions; shares information and resources; develops its strategies, priorities, or work plans; and communicates internally and externally.

While some processes may have been established during the formation and early building phase, they are apt to need updating. This section of the toolkit includes the processes a group will likely need during this stage, with more attention to scenarios and examples than in the start-up toolkit Processes section, which centered on guiding prompts, questions, and key considerations.

Activities & Resources:

- Resource – North Coast Resource Partnership Policies & Procedures Handbook

Decision-Making Approach

The focus of collaborative decision-making evolves significantly from the start-up stage to the sustaining stage, shifting from an emphasis on structure and goal alignment to a focus on ongoing performance, operationalizing shared leadership[29], finding efficiencies, and, in some cases, helping advance systems change through policy actions or other work that has far-reaching benefits.

In the sustaining stage, the collaborative is maturing and decision-making often becomes a more integrated, efficient process as partners focus on implementation, evaluation, and course correction. Leadership is usually shared across the governance structure. During this stage, processes are operationalized, formalized, and grounded in both cultural norms and trust, allowing conflicts to be addressed constructively and issues resolved effectively. This supports both adaptability to changing conditions and the achievement of meaningful, measurable impact.

[29] Leadership becomes a dynamic, reciprocal process where influence and responsibility move between partners rather than remaining fixed (Klasmeier, et., al. (2025). Shared leadership often leads to redefining roles, clarifying decision authorities, and adjusting governance expectations, sometimes requiring system-wide changes. (Brazen Consulting and Accounting. (2025)

Examples of decisions made during this stage that could affect capacity, processes, structure, and functions include:

- What should be included in a policy for data sharing and management, and what type of agreement(s) is(are) needed to enable efficient data sharing?
- If we pursue large-scale funding opportunities for regional projects, how can we best distribute that funding to partners? What agreements and processes would those scenarios require?
- What options should we pursue if we have less funding and resources than are needed?
- What steps do we need to consider if one of our key land-management partners is no longer able to participate and needs to disengage?

In contrast to what is described under the **Collaborative Stewardship Starter & Builder Kit,** a group in the late building and sustaining stages may employ a variety of approaches and tools to support decision-making under different circumstances. These can include structured dialogue protocols, clear issue-resolution pathways, shared norms, and facilitation tools—such as after-action reviews, restorative conversations, and decision-making playbooks—to address conflict constructively and resolve issues before they escalate. Table 3 lists many of these tools and their uses.

Table 3: Tools for Constructive Conflict and Issue Resolution in the Sustaining Stage

Category	Tool/Practice	What It Helps With
Structured Dialogue Protocols	*Ladder of Inference Check-In*	Surfaces assumptions, prevents misunderstandings, slows reactive responses.
	"What's Under the Waterline?" Iceberg Tool	Distinguishes surface disagreements from deeper interests, values, or concerns.
	Round-Robin/Go-Arounds	Ensures equal voice, reduces dominance, builds shared understanding.
Issue-Resolution Pathways	*Tiered Issue Escalation Pathway*	Provides a clear, predictable process for raising and resolving issues at the right level.

Category	Tool/Practice	What It Helps With
	Decision-Making Playbooks (RACI, RAPID, DACI)	Clarifies who decides, who advises, and who must be consulted—reducing conflict caused by ambiguity.
	"No Surprises" Agreements	Encourages early communication of concerns before they escalate.
Norms & Agreements	*Behavioral Norms/Operating Agreements*	Sets expectations for how partners engage, disagree, and stay accountable.
	Shared Accountability Frameworks	Defines how commitments are tracked and how partners hold each other accountable.
Real-Time Facilitation Tools	*Pause and Probe*	Interrupts unproductive dynamics and brings clarity to tense moments.
	Reframing	Shifts positional statements into interest-based dialogue.
	Heat Mapping	Identifies areas of alignment and tension to focus discussion.
Reflective & Restorative Practices	*After-Action Reviews (AARs)*	Creates shared learning after decisions or events; reduces blame and builds trust.
	Restorative Conversations	Repairs trust when harm or misunderstanding has occurred.
	Pulse Checks	Detects emerging tensions early through quick surveys or check-ins.

Strategy & Priority Setting

Mature stewardship collaboratives often develop sophisticated strategy and priority-setting processes that move beyond initial project identification to focus on collaborative-wide planning tools, data-informed priority-setting processes, land-/seascape-scale project portfolio development, long-term sustainability and increased outcomes and impact.

It is essential to understand the existing systems partners use, including policies and limitations, prior to reviewing and adopting new processes.

Strategy and priority-setting processes often applied during this stage can include, but are not limited to:

- structured prioritization methods to rank projects, such as weighted scoring models, frameworks like RICE (Reach, Impact, Confidence, Effort) or MoSCoW (Must-have, Should-have, Could-have, Won't-have), matrices (e.g., impact vs. effort), and other evidence-informed deliberative processes;
- cross-functional scenario planning to test assumptions in times of uncertainty;
- regular adaptive management cycles to track progress and respond to changing conditions;
- planning sessions that engage a diverse representation of partners and interested and affected communities; and
- strategic pruning decisions about what not to pursue so resources remain focused on the highest-value priorities.

The examples that follow illustrate many approaches to collaborative strategic planning that can be adapted and adopted by others.

Activities & Resources:

- Worksheet – Scenario Planning for Strategic Priority Setting
- Worksheet – Exploring & Finding Project Themes
- Example – Regional Action Plan (LCWP)
- Example – Regional Plan & Actionable Strategies (NCRP)
- Example – Strategy & Framework for Resilience (TCSI)
- Example – Regional Project Plan (SD County)
- Example – 5-Year Regional Strategy (One Tam)
- Example – 10-Year Regional Plan (TCSI)
- Example – Envision the Choptank – Common Agenda

Budget

In the sustaining stage, budget development becomes more structured, formalized, and data-driven, blending operational insight with collective accountability. Budgets become more detailed and are tied closely to functional needs and strategic priorities. They tend to focus on sustaining the collaborative's performance and impact and creating the ability to reallocate resources as conditions change.

In essence, in the forming stage, the budget can be viewed more as a planning and consensus-building tool, while in the sustaining stage, it becomes a performance, management, and accountability tool.

Fundraising

It takes considerable time and capacity for a collaborative to achieve financial sustainability; in some cases, it may prove to be unachievable. During the formation phase, fundraising and business models typically focus on securing support based on an early vision and potential project(s). In the sustaining stage, supported by a proven track record and demonstrated outcomes, emphasis shifts to the need for predictable revenue streams.

The approach also becomes more diversified, focusing on funder retention, cultivating new sources, and planning for long-term resilience. The mechanisms for securing, distributing, and tracking funding have likely been tested and are further adapted and operationalized. Messaging typically shifts to highlight collaborative outcomes and demonstrated impact(s).

There needs to be a clear understanding of where collaborative and partner-level fundraising efforts overlap or risk duplication, how to prioritize which sources to pursue, and when agreements are needed to facilitate internal fund transfers among partners. Transparent financial practices are essential for maintaining trust and supporting long-term resilience. Similarly, it is critical to have attribution and reporting protocols for matched funding in situations where both the collaborative and individual partners are implementing aspects of a project.

Sustaining a collaborative requires the capacity to continuously seek and secure funding for operations, projects, and programs. It also relies on systems for securing, distributing, and tracking funds. These may have been developed during the start-up and building phases. Even so, they may need to be modified based on the partnership's evolving needs.

If doing this for the first time, getting these systems in place may require new/updated skill sets, tools, or ways of thinking, all of which can take time, additional capacity, and likely legal review to develop. This is particularly true for fiscal sponsors accustomed to managing only their own organizational budgets. (The **Matrix of California-based Stewardship Collaboratives** includes notes on the funding model each group uses, which may be a helpful reference for different approaches.)

As collaboratives move into the sustaining stage, they often also need to develop a more focused set of tools to help partners and funders understand how the group operates, what it needs, and how resources might be secured. The primary tools and their different purposes are described here.

Business Model — How the Collaborative Creates Value

The business model is the foundation: it shows why the collaborative exists and how it delivers value. It describes how work is organized and resources flow. This includes things like coordinated stewardship projects, backbone support, and partner contributions.

Business Plan — How the Collaborative Will Implement Its Work

A business plan turns the business model into an actionable road map. It is the implementation guide that shows what the collaborative will do and what it needs to succeed. It outlines strategic priorities; the outcomes partners commit to; and the financial, human, and operational resources required. It includes timelines, performance measures, and—when appropriate—revenue-generating activities such as workshops, convenings, peer learning, membership contributions, or sponsorships.

Fundraising Strategy — How the Collaborative Will Secure Resources

The fundraising strategy is the financial engine: it shows how the collaborative will bring in the money needed to operate and grow. It focuses specifically on how the it will secure the financial resources needed to support its business model and business plan. It articulates the case for support; identifies funding sources; sets revenue goals; and outlines roles, responsibilities, and protocols for pursuing funding. It also clarifies how collaborative-level fundraising aligns with partners' individual efforts to avoid duplication and ensure transparency.

Activities & Resources:

- Example – Redwoods Rising: Healing the Landscape Together (2023-2027)
- Example – Conserving and Restoring Tallgrass Prairie Business Plan (draft), Prairie Coteau, South Dakota and Minnesota

Communications (Internal/External)

In a collaborative's forming and early building stages, communication processes are typically centered on establishing trust, defining roles, clarifying goals, and developing shared communications platforms and guidelines. As they mature, the focus shifts to developing and institutionalizing protocols and templates, facilitating efficient decision-making and ongoing adaptation, and generating external awareness and support. Maintaining the sweet spot of a collaborative often depends on the continuing quality of the connections and willing participation across its participants, so paying attention to signals that communication systems need to be strengthened or changed remains essential.

Protocols developed during this stage often focus on establishing standardized language (e.g., key terms), brand guidelines, case statements, clear roles/responsibilities (e.g., media liaison, spokespeople, webpage manager), and documentation standards (e.g., generic templates).

The following lists summarize specific types of internal and external communication process needs, guidelines, and/or protocols a collaborative can encounter during this stage. Discussing what might be included, and why and when they could be important, can help address partner concerns and establish shared expectations.

Internal

- **Orientation and onboarding processes and materials**. Offer new partners, staff, or other participants a welcoming, clear, and consistent start.
- **Style guide and/or brand guidelines**. Give a collaborative (and its partners) a shared, consistent way to represent themselves, from visual identity to messaging.
- **Communications and information-sharing systems**. Provide a consistent and curated flow between the collaborative and partner organizations, often including access and data-privacy guidelines.
- **Digital asset management procedures**. Indicate when and how partner assets (e.g., photo-releases, images and materials for websites, reports) are shared and attributed.

External

- **Branding requirements.** Ensure any necessary logo licensing agreements are in place, especially with public agencies.
- **Media-related activities protocol**. Establish clear roles and processes for joint press releases, media interviews, and other external communications.
- **Collaborative publication and report attribution protocol**. Create a standard citation format, including who should be recognized as authors for publications, datasets, and tools.

- **Events and presentation guidelines**. Allow a shared understanding of how the collaborative is represented in external presentations, conferences, and public meetings.
- **Guidelines for fundraising materials**. Set agreed-upon standards for when the collaborative will be named in fundraising campaigns and clear expectations about how the money raised will be used.
- **Recognition and accountability guidelines**. Provide a framework for recognizing both individual partner contributions and collaborative accomplishments, and can boost morale, engagement, and accountability.

Activities & Resources:

- Example: Collaborative Annual Report (Lancaster Clean Water Partners)
- Example: Redwoods Rising Frequently Asked Questions (FAQs)
- Example – Internal Collaborative Communication Processes & Agreements
- Example – Collaborative Messaging Playbook
- Example – Collaborative Branding Guidelines
- Example – Brand Handbook
- Example – Media Guidelines

Tracking & Assessing Progress; Continuous Learning

In the early life cycle stages, partners often establish expectations for accountability and transparency and use simple tools to track progress toward their goals. As the collaborative matures, these typically evolve into formal systems for gathering and analyzing performance and outcome data, enabling them to learn together, identify necessary adjustments, and strengthen trust.

Mature groups may also use public dashboards and regular reporting to make progress visible to interested parties, guide improvement, demonstrate value, and influence broader system change (Karam et al., 2025). They can also serve as a powerful catalyst for helping secure sustainable funding. Because funders often look for (ore require) tracking and assessment to show impact, orienting metrics at least in part to what they may be seeking can be a strategic choice.

The **Collaborative Stewardship Starter & Builder Kit** describes different kinds of evaluations, along with *why, what, how,* and *when* assessments are needed in the starting and building stages. This section builds on that information by describing the rationale (why) to conduct assessments and evaluations, in addition to examples of indicators to measure (what) for the sustaining stage. The *how* and *when* remain the same and are not repeated here. Previously noted, it is important in the sustaining stage to deepen rigor where it adds value, while maintaining periodic pulse checks to protect collaborative health and capacity.

The Collaborative Capacity Impact Model (Mickel & Farrell, 2025a) is a practical framework that can be used to describe, assess, and demonstrate a group's impacts. This model was recently used to evaluate two grant programs that fund collaborative capacity—the National Fish and Wildlife Foundation's Innovative Nutrient and Sediment Reduction Grant Program (Mickel & Farrell 2025b) and the Network for Landscape Conservation's Catalyst Fund (Mickel, 2026). Findings from these evaluations illustrate the ways capacity investments strengthen processes and functioning and result in on-the-ground impacts, among other positive outcomes.

Activities & Resources:

- Resource – Why Assess and Evaluate
- Resource – What to Measure

Capacities & Infrastructure

The Design section of this part of the toolkit illustrates the kinds of questions and choices about purpose, structure, roles, decision-making, and how the work gets done that partners often wrestle with in this stage. This section turns to the practical side: the capacities and infrastructure that make it possible to navigate those design considerations effectively.

In the late building and sustaining stages, a collaborative typically shifts its focus to refining and operationalizing essential systems; maintaining momentum; implementing (and possibly scaling-up) projects; and institutionalizing its relationships and practices. Building the necessary capacities, internal systems, and processes in tandem with scaling its work is critical for it to maintain its sweet spot (see Figure 1).

All of this requires capacity and infrastructure to be successful (Mickel & Farrell, 2025a&b). As it can for any organization, growth can stretch a group's capacity, at times leading to work overload or declining quality. When growth is intentional rather than reactive, this can be managed.

In short, during the forming and early building stages, collaboratives typically need light and flexible fiscal and coordination support to get organized and build trust. During the later building and sustaining stages, they require formalized systems, dedicated professional staff, and robust financial and operational infrastructure to manage complexity, accountability, and long-term impact.

This section of the toolkit is organized to illustrate the capacities and infrastructure a collaborative will likely need, adapt, and/or operationalize at the later building and sustaining stages. However, resources and examples included in the **Collaborative Stewardship Starter & Builder Kit** are also applicable. For example, the sample position descriptions for shared staff, their legal and administrative organizational roles, and work plan templates can be referenced and used as needed. The capacity assessment section from the start-up phase also has utility here.

Ongoing Capacity

To sustain progress, partners should regularly assess staffing needs, plan for succession, secure consistent funding for key roles, and leverage in-kind staff support. The tools described in the Assessing Collaborative Capacity Needs section of the **Collaborative Stewardship Starter & Builder Kit** can be used to identify capacities that are important during this stage and to reveal gaps.

Fiscal Administration & Backbone Functions

During this stage, the leadership team continues to assess the structures needed, including current fiscal administrator/backbone organization roles, needs, performance, and agreements. The status quo may be maintained, or—equally likely—new capacities added, measures to reduce financial risk and liability developed, a new fiscal administrator/backbone organization chosen, fiscal and operational responsibilities divided or rotated between multiple administrators, and/or something entirely different.

Coordination Capacity & Staffing

As a collaborative matures, so does the need for full-time or multirole staffing. This can be provided through shared staff hired by the fiscal administrator or backbone organization, provided in-kind through partners, or a combination of the two. Positions typically needed include coordinators; project/program managers; field staff; dedicated data, finance, and communication leads; fellows; and interns. The number and types of staff needed depend on the group's activities and its desired outcomes. However, research and practice indicate that coordination capacity is essential throughout all stages of a collaborative's evolution.

Success committees play an essential role in supporting shared staff as the complexity, scope, and scale of their work increases. Equally important is co-developing clear individual work plans that are approved by both the collaborative's leadership and the individual's supervisor.

Collaborative Systems & Infrastructure

As with the earlier Processes section, it is important for a collaborative to establish the systems and infrastructure that will allow it to function effectively, efficiently, and transparently. This stage is characterized by adapting and operationalizing previously developed processes and adding new ones to support internal connectivity, information flow, and coordinated action.

The following list briefly highlights some of the additional needs a maturing collaborative may have.

- **Data and file sharing**. Formalize more robust, diverse, and easily accessible data-sharing methods and platforms to manage both existing and newly acquired data (see **Collaborative Stewardship Starter & Builder Kit** for types of shared data and platforms).
- **Digital communications**. Adopt more advanced systems to support increased communication and information dissemination (e.g., dashboards, newsletters, shared internal platforms, public reporting).
- **Financial management and accounting**. Establish more robust financial management and reporting systems that meet funder, partner, and public accountability expectations and can be used to track funding, in-kind match,

and spending across multiple partners or projects; modify or add new compliance and risk-management systems; manage more complex funding streams (e.g., large land-/seascape-level grants); and increase insurance liability and other risk-reduction measures to meet partner and funder requirements.

- **Physical infrastructure**. Assess current use, modifying and adding new infrastructure as needed. Some maturing collaboratives consider buying equipment or renting dedicated space beyond those that partners initially shared during the forming and building stages.

Activities & Resources:

- Worksheet – Periodic Organizational Capacity Check-in

Collaborative Skills & Abilities

By the sustaining stage, a collaborative mindset that puts "we" over "me" should be well established. The group is now focused on shared outcomes and relying on key skills such as effective communication, empathy, open-mindedness, continuous learning, accountability, and problem-solving. These are essential to fostering an inclusive culture that ensures that everyone feels valued, respected, and heard.

This is strengthened cultural competency, empowerment, and advocacy skills, which help reduce bias and create a safe environment for open dialogue and participation. Meaningful relationships grow from the trust, respect, and genuine connection supported by these skills. The time, commitment, and practice it takes to hone them are an investment in creating an environment in which diverse perspectives are valued, and everyone feels safe and empowered to contribute.

Regardless of which life-cycle stage it is in, a collaborative needs ongoing leadership development and skill progression, growth, and refinement. Related **Collaborative Stewardship Starter & Builder Kit** text and resources also apply broadly to activities listed here.

During later building and sustaining phases, high-functioning groups often rely on a set of characteristics that create an inclusive culture, strong relationships, and a collaborative mindset. They include (deSilva et al., 2022):

- grounding capacity-building in equity by centering systemically marginalized communities;
- ensuring transparent, equitable, and additive governance and decision-making;
- nurturing a collaborative culture with the skills, tools, and trust needed for effective problem solving;
- supporting a collaborative mindset through a capable facilitator or convenor;
- co-creating outcomes that reflect shared priorities rather than privileging well-resourced partners;
- committing to long-term success through sustained capacity, infrastructure, culture, leadership, and continuous learning; and
- demonstrating and communicating how collaborative capacity produces tangible environmental, social, and economic outcomes.

Collaborative Stewardship Transition Kit

Even successful collaboratives may complete their work, lose critical support, or simply outgrow their original purpose. A group may grow, spin off, shift focus, scale back, pause, or conclude its work. As people, partners, and communities evolve, collaboratives must often evolve as well.

Like starting, building, and sustaining a collaborative, this phase should be approached with intention and purpose. This section of the toolkit provides overarching context, key considerations, and discussion prompts for conversations about transitioning, pausing, or ending as well as guidance on some of the considerations for next steps.

Choosing the right path requires an understanding of the collaborative's stability, success, partner and community needs, resources, and appetite for change while recognizing that transitions often bring added demands and trade-offs. Transition points are a normal part of a group's evolution, though it can be difficult to know when a major shift is needed and how to navigate it.

Regardless of what happens, it is important to take time during these pivotal moments to reflect and celebrate what has been accomplished together, even if it was challenging. Stewardship work can be difficult and complex, but the passion and purpose that drive it, bright spots along the way, and the positive difference it can make are what help keep those doing this work going.

Key Activities

- Reexamine vision, goals, and value proposition(s).
- Conduct assessments to understand emerging needs or system changes.
- Redesign governance, membership, or operating structures.
- Introduce new priorities, strategies, or ways of working.
- Strengthen or rebuild relationships among partners.
- Explore new funding models or partnerships.

Resources in this Kit

Section	Resources
Merging the Collaborative	• Exercise – Should We Merge & What Should We Consider
Pausing the Collaborative	• Exercise – Should We Take a Break
Ending the Collaborative	• Exercise – Deciding to End a Collaboration • Worksheet – Ending or Sunsetting a Collaborative

Changing the Collaborative Model

Collaboratives—especially those that have been working together for a long time—may discover they have accomplished everything they set out to, or that their focus needs to shift based upon internal and/or external factors.[30] Partners may find that the way they have been working together no longer meets their needs, and seek to renew their work together under a new or significantly adapted model. Ultimately, when the current design no longer fits, adaptation or significant change is necessary. If a decision is made to renew the collaborative, the lifecycle process may begin again.

Form should follow function, so if the collaborative's original purpose has been met or needs to change, its design should as well. This can include a different governance structure, agreements, staffing or funding models, and more. The question prompts that follow each section below will help guide the conversation around what changes may be needed and why.

Merging the Collaborative

A stewardship collaborative might consider merging when doing so increases impact, reduces duplication, strengthens capacity, or positions partners for long-term success. The assessment process should include whether the two groups can realistically integrate their governance, culture, funding, and operations. The following exercise provides guidance for navigating this discussion.

Activities & Resources:

- Exercise – Should We Merge & What Should We Consider

[30] This can occur when its original purpose or strategy no longer fits current needs; when governance or decision-making consistently breaks down; or when shifts in partners, staffing, or funding make the existing structure unworkable. Major external changes (e.g., new policies, overlapping regional efforts, increased complexity) can also push a collaborative to redesign how it operates.

Pausing the Collaborative

Like any relationship, the need to take a break can arise suddenly or emerge over time. Reasons may include changes in staff capacity or funding, shifting political or policy environments, natural disasters, or any number of other things. However, once a pause is decided upon, what needs to happen next follows some consistent themes. This can occur at any point in a collaborative's lifecycle, once or multiple times. (Discussion prompts to support these conversations are linked below.)

Activities & Resources:

- Exercise – Should We Take a Break

Ending the Collaborative

There may come a time when the partnership has met its goals, when capacity or relationships have changed such that they no longer support shared work, or when a pause becomes a permanent stop. Many collaboratives find themselves wanting or needing to end their work together. This corresponds to the decline stage of a collaborative's lifecycle and is a natural part of its evolution. It can be a time to celebrate what has been accomplished and move on to new things.

As with other aspects of collaboration, it is best if moving on can be done thoughtfully and intentionally in a way that preserves important information and lessons learned. The following exercise will help guide these discussions as well as provide a checklist for the kinds of things that need to be documented.

Activities & Resources:

- Exercise – Deciding to End a Collaboration
- Worksheet – Ending or Sunsetting a Collaborative

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Supplemental Resources

The links below include a subset of resources that broadly help support collaboration and supplement the more specific resources shared throughout this toolkit.

Broad Web-Based Collaborative Stewardship Community of Practice

- California Landscape Stewardship Network Resource Library
- Center for Collaborative Conservation: The Five Foundations for Practicing Collaborative Conservation
- National Forest Foundation Conservation Connect Collaboration Resources
- Network for Landscape Conservation Resources Library
- Rural Voices Collaborative Conservation Learning, Tools & Products

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Appendices

Appendix 1. Glossary of Terms

Alliance: A voluntary grouping of organizations that join together around a shared interest or purpose, often to amplify influence or coordinate messaging (Bryson, et al., 2015).

Association: A formal or semi-formal membership group organized around a shared profession, interest, or mission (Provan & Kenis, 2008).

Backbone Organization: A dedicated entity (or entities) that provides the essential infrastructure, coordination, and administrative support necessary for collaboratives to succeed and function (Turner et al., 2012).

Coalition: A group of organizations that join together to advocate for shared policy, funding, or systems-change goals (Bryson et al., 2015).

Collaborative Capacity: A collaborative's ability to perform its collective purpose and achieve desired outcomes (Mickel & Farrell, 2025a).

Collaborative Culture: The shared norms, values, behaviors, and expectations that shape how partners interact within a collaborative. It reflects the degree of trust, inclusivity, transparency, reciprocity, and shared leadership that partners cultivate over time (Huxham & Vangen, 2005).

Collaborative Infrastructure: The systems, processes, tools, and organizational supports that enable a collaborative to function effectively. This includes governance structures, decision-making processes, communication systems, data-sharing platforms, backbone staffing, funding mechanisms, and shared protocols (DeSilva et al., 2022).

Collaborative Life Cycle: A framework that defines the developmental stages of partnerships as they evolve from start-up through building, sustaining, and eventual decline or renewal (Mickel & Farrell, 2025a).

Concessionaire: An entity that operates services or facilities under agreement with a public agency, often generating revenue while supporting stewardship or visitor services.

Cooperation vs Coordination vs Collaboration (Mattessich & Johnson, 2018)

- ✓ *Cooperation*: Sharing information or offering help when asked.
- ✓ *Coordination*: Aligning activities to reduce duplication.
- ✓ *Collaboration*: Sharing power, decision-making, and responsibility to achieve shared outcomes.

Fiscal Administrator: An entity that provides financial management services—such as bookkeeping, invoicing, grant reporting, or fund disbursement—on behalf of a collaborative or group of partners. Unlike a fiscal sponsor, a fiscal administrator does not provide tax-exempt status, assume legal responsibility for the project, or receive tax-deductible donations on the collaborative's behalf. It functions strictly as a financial service provider, not a legal host (Colvin, G., 2016).

Fiscal Sponsor: A 501(c)(3) nonprofit organization that provides its tax-exempt status, legal oversight, and administrative infrastructure to a project or collaborative that does not have its own nonprofit designation. Through fiscal sponsorship, the sponsor can receive tax-deductible donations, manage grant funds, enter into contracts, and ensure compliance on behalf of the collaborative. Fiscal sponsorship is a formal legal relationship governed by IRS rules and established sponsorship models (Colvin, G., 2016).

Landscape Collaborative: is a place-based group of diverse partners working together across boundaries to address complex, large-scale challenges related to the stewardship, conservation, and resilience of a specific geographic area. These typically involve a wide range of participants from multiple sectors, including government agencies, Tribes, nonprofits, private landowners, academic institutions, and community groups. (Huayhuaca & Reid, 2019).

Network: A group of individuals or organizations connected by relationships, shared interests, or common goals (Borgatti, et al., 2013).

Partnership: A relationship between two or more entities that agree to work together toward shared goals with defined roles and contributions (Bryson et al., 2015).

Roundtable: A structured yet informal forum where partners, stakeholders, or subject-matter experts come together as equals to share perspectives, exchange information, and explore issues relevant to a collaborative's work. Roundtables emphasize open dialogue, mutual learning, and relationship-building rather than decision-making or formal governance. They are often used to surface diverse viewpoints, strengthen trust, and generate shared understanding that can inform the collaborative's strategy, design, or implementation (Ansell & Gash, 2008).

Seascape Collaborative: A joint effort or network that includes managers, community groups, Tribes, commercial and recreational fishermen, and non-governmental organizations that work together to manage marine and coastal environments (Steadman, 2021).

Steering Committee: small group of representatives who provide strategic guidance, oversight, and direction for a collaborative. They help maintain alignment with the collaborative's purpose, ensure accountability to shared goals, and make or prepare decisions on behalf of the broader partnership. Steering Committees often guide priorities, monitor progress, and support the backbone organization in managing the collaborative's overall health and functioning (Bryson et al., 2015).

Taskforce: A time-limited group formed to address a specific issue or produce a defined set of recommendations. They operate under the broader direction of the collaborative or its Steering Committee and report back with findings, products, or proposed actions (Bryson et al., 2015).

Working Group: A task-oriented, often time-limited team that focuses on a specific issue, project, or area of work. Working groups bring together partners with relevant expertise to develop recommendations, carry out technical tasks, or advance a defined portion of the collaborative's strategy. They operate under the broader direction of the collaborative or its steering committee and report back with findings, products, or proposed actions (Emerson & Nabatchi, 2015).

Appendix 2. Connectivity Across Stewardship Collaboratives

Along with the recent growth of place-based land-/seascape collaboratives, statewide stewardship networks have also emerged, specifically, the Marine Protected Area Collaborative Network (2012) and the California Landscape Stewardship Network (2016). Both help advance cross-boundary approaches to statewide stewardship challenges and opportunities. These groups often emerge to provide shared services and capacity more local efforts; connect collaboratives across a broader geography or topic area; or to work on larger-scale systems change through policy, funding, or advocacy.

Marine Protected Area Collaborative Network

The Marine Protected Area (MPA) Collaborative Network (CN) supports the efficacy of California's 124 MPAs, which are organized into 14 seascape stewardship collaboratives.[31] Using a centralized hub model, MPACN supports coordination and capacity-building for these groups. It has an executive director with statewide oversight and a dedicated staff who provide regional capacity for MPA outreach and education, enforcement and compliance, research and monitoring, and policy and permitting. MPACN also plays a critical coordination and liaison role, facilitating the multidirectional flow of information between local collaboratives and state agencies such as the California Department of Fish and Wildlife, Department of Parks and Recreation, the Ocean Protection Council, and other state and federal entities who participate on the MPA Statewide Leadership Team.

California Landscape Stewardship Network

The California Landscape Stewardship Network (CLSN) supports connectivity and information exchange among roughly 40 landscape stewardship collaboratives[32] encompassing more than 60 percent of the state. The CLSN Manager provides coordination capacity and facilitates information sharing and peer exchange.

[31] See here for a map of the MPACN and here for a map of MPAs and California State Parks.
[32] See the map of CLSN's participating landscape stewardship collaboratives here.

Through a networked structure,[33] it promotes collaborative stewardship and landscape-scale practices. It helps advance policy and funding opportunities, build meaningful relationships with state and regional agencies to innovate larger-scale solutions to common challenges, and strengthens justice and equity in conservation work. This is done through facilitating peer learning, forums to address systemic barriers, and the trust-building needed to take collective action. Both MPACN and CLSN also operate as movement networks, meaning they include long-term, organized, and collective actions designed to build sociopolitical changes for the benefit of people and nature.[34]

As the need for large, multiple-benefit, climate-adaptation projects intensifies, many of these land- and seascape collaboratives are exploring ways to integrate their work and achieve greater impact.

An important differentiation between California's landscape and seascape stewardship collaboratives is that the state's Marine Protected Areas (MPAs) were established under the 1999 Marine Life Protection Act, which mandated a statewide, science-based, and regionally planned MPA network implemented through the Marine Managed Areas Improvement Act. California's science-based and community-driven MPAs have no direct analogue in landscape stewardship collaboratives. However, some state grant funding has begun to incentivize working in partnership.

Regardless of how land- or seascape collaboratives are established, however, both follow a similar partner-driven design approach.

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[33] A flexible self-organizing system/structure that can span regions, organizations, sectors, and silos of all kinds; a type of collaborative.

[34] Movement networks resemble a network-of-networks, linking regional or narrowly focused groups. They come together to build relationships, share information, coordinate action and catalyze systemic change (Ehrlichman, 2021). These networks don't just provide existing resources but are also working to actively shape/guide the future of their communities of interest by providing thought leadership.

Appendix 3. Collaborative as an Umbrella Term

Because collaborative land-/seascape stewardship practice has evolved somewhat organically, no definitive framework or agreed-upon nomenclature exists to differentiate between the many types and models. This is compounded by the fact that many names include terms (e.g., alliance, association, coalition, consortium, network, partnership, roundtable) often inconsistent with how they are organized and what they do (Mickel & Farrell, 2025a). This variety of names is evident in the **Matrix of California-based Stewardship Collaboratives**. While many of these words are used synonymously, some key distinctions can be made (see Glossary of Terms in Appendix 1).

This toolkit incorporates recent research by Mickel and Farrell (2025a) that **identifies *collaboratives* as an umbrella term**.

Appendix 4. Kinds of Agreements

This list of commonly used agreement types includes the intended purpose, parties, and content, defined in a generic context (as some are defined in statute for specific purposes), unless otherwise indicated. Ideally, the initial agreement explicitly defines a process for periodic review and modification, including triggers or set timeframes. The Authorities & Agreements with California State Parks Matrix outlines the types of authorities often granted within each kind, specific to State Parks.

- **Charter**. A non-legally binding document typically outlining the shared purpose, principles, goals, structure, composition, and process framework for the collaborating parties. It serves as a voluntary "social contract" or a guiding framework to help align partners, clarify expectations, and provide direction for collective action. Unless stipulated, it does not grant specific authorities to partners. Many land-/seascape stewardship collaboratives develop charters during the forming and building life-cycle phases.
- **Co-governance agreement**.[35] A formal agreement between a government agency and another entity (e.g., community organization or federally recognized Tribe) that involves shared power and decision-making authority. Parties can work together to plan, manage, and implement policies and programs, including establishing formal protocols for decision-making and management, and in some cases, legally transferring authorities.
- **Co-management or co-stewardship agreement.**[36] A formal arrangement in which two or more entities—often a government agency and a cooperating partner, another agency, or Tribe—identify or share management responsibilities for land and its resources. Specific and mutually agreed-upon authorities are outlined in the agreement.
- **Contract**. A legally binding and enforceable agreement with explicit terms and consequences for non-compliance. Legal authorities can be included in a contract.

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[35] Co-governance and co-management for Tribes is defined in Assembly Bill 1284
[36] Co-management for California State Parks is defined under California Public Resources Code 5080.42

- **Cooperative agreement**. A legal instrument that involves a transfer of value (e.g., funds, shared resources) between parties for a public purpose. This type of agreement is often used to outline roles, responsibilities, and terms of cooperating-partner relationships with agencies. Specific and mutually agreed-upon authorities are outlined in the agreement.
- **Cooperating association agreement**. A formal legal agreement between California State Parks and a non-profit organization designed to enhance educational, interpretive, and visitor service programs. These agreements, authorized under California Public Resources Code, focus on supporting education and interpretation, visitor amenities, and cultural/natural resource protection.
- **Fundraising agreement**. A legal instrument that typically defines the partner's limited authority to solicit and manage donations for approved purposes, while preserving the agency's control over public resources and final decision-making. It is often used to outline permitted activities, how funds may be transferred and used, and the agency's review and approval processes.
- **Good neighbor agreement**. A legal agreement that allows states, counties, or federally recognized Tribes to collaborate with federal agencies to conduct restoration and stewardship projects on federal lands. It can grant legal authority if it is a formal, written, and legally binding contract entered into under specific statutory authority, such as the federal Good Neighbor Authority.
- **Interagency agreement**. A formal legal agreement between government agencies that creates mutual commitments to support their respective missions and collaboration. It is often used for tasks like contracting assistance, financial services, implementing a range of projects at a "programmatic" level, or specialized support. Specific and mutually agreed-upon authorities are outlined in this type of agreement.
- **Joint powers agreement**. A foundational document that outlines how agencies will share powers. It can be used in two ways: to manage the shared powers within a collaborating framework or to create a new, independent entity with its own board and legal standing. A joint powers agreement can grant legal authority by allowing public agencies to jointly exercise powers common to them or by forming a separate, independent

public entity to do so. This agreement is used to create a joint powers authority (or JPA), a separate legal entity.

- **Master agreement**. A type of contract that establishes the framework for a long-term relationship, including standard terms with pre-qualified contractors/vendors. A master agreement is used to simplify contracting processes and reduce time required to administer future projects. Unless specified, it does not grant specific authorities to partners.
- **Memorandum of agreement (MOA)**. A formal, specific, and often legally binding document detailing roles, responsibilities, and terms. MOAs define the specific actions and commitments required to achieve an objective, particularly when funds are involved.
- **Memorandum of understanding (MOU)**. A non-legally binding agreement that documents mutual intentions and understanding between separate parties who agree to work together on a common objective. Unless specified, it does not grant specific authorities to partners.
- **Nonprofit operating agreement (NPOA).** Related to California State Park partnership authorities, a legally binding contract that allows an outside nonprofit organization to provide full or partial management and operation of a park unit and interpretive and visitor services and support cost-effective management.
- **Public operating agreement (POA)[37]**. A formal contract between public agencies—such as a city, county, or special district—that delegate limited authority to operate, maintain, or improve a specific park units, reserves or facilities, etc. They define the scope of operational responsibilities, cost-sharing, staffing, maintenance standards, and decision-making authority, while ensuring the landowner retains ownership, policy oversight, and final approval rights.
- **Proud partner agreement**. A type of sponsorship agreement in which a private or nonprofit organization provides funding or services to another entity (e.g., a state or national park system) in return for marketing benefits, such as the right to use the entity’s logo and “exclusivity” in a product category.

[37] Specific to California State Parks, California Public Resources Code 5080.44.

- **Shared stewardship agreement**. A specific type of non-legally binding MOU that focuses on land and forest management. Unless specified, it does not grant specific authorities to partners.

Appendix 5. Collaborative Capacity Framework

Collaborative capacity refers to a collaborative's ability to perform its collective purpose and achieve desired outcomes.

The Collaborative Capacity Framework (deSilva et al., 2022) provides a useful model for understanding the elements that enable collaboratives to collectively perform land-/seascape activities and outcomes. It identifies key elements that can optimize a group's performance. It is the product of more than 25 interviews with state leaders, surveys with regional network practitioners in California, analyses of recent publications (including peer-reviewed research), and multiple forums held with national organizations.

This framework includes six fundable structural elements and three binding elements:

The Collaborative Capacity Framework

Structural elements

Following are the fundable, structural elements of collaborative capacity (often referred to as collaborative infrastructure):

Coordination capacity. Basic staffing support and coordination glue that holds the collaborative's logistics and its collective actives together. Includes dedicated staff time and/or contracted services for essential backbone coordination and administrative support, including facilitation, meeting management, communications, progress tracking and measurement, collective administrative, project coordination, and more.

Systems and infrastructure. Basic operational and communication structures that facilitate internal connectivity, alignment, and information flow. Includes fiscal management, technical services and support to meet project/program needs, communications systems, reporting, and data-sharing systems for the collaborative's activities; intra-collaborative resources; facilities and equipment; and more.

Governance and decision-making structures. Collaboratives exist and operate in the space between organizations, which necessitates transparent and mutually agreed-upon pathways for reaching and executing decisions. Includes the collaborative's organizational structure (e.g., leadership teams, steering committees, working groups) and associated decision-making processes that help steer its vision and support accountability.

Collaborative practices, skills & tools. Training opportunities, resources, peer-to-peer exchanges to build key collaborative skills, abilities, and culture.

Shared strategies & priorities. A shared and clear understanding of how a collaborative is going to work together and what it will strive to do. Includes frameworks that encompass and translate the group's vision and desired goals to strategies, work plans, activities, and a shared understanding of partner roles and capacities.

Collective purpose & goals. The "north star" or animating purpose that holds the collaborative together. Includes agreements (e.g., MOUs, charters) and other mechanisms that outline and codify a partnership’s vision, purpose, and values, and the collective and individual authorities and roles necessary to achieve those.

The Collaborative Capacity Framework also includes three binding elements: **collaborative mindset**, **inclusive culture,** and **meaningful relationships**. Research and practice have clearly shown that when the appropriate structural elements of collaborative capacity are resourced—and the quality and performance of the binding elements are strong— collaboratives can produce greater, more durable environmental and social outcomes than any individual organization can achieve on its own (deSilva et al., 2022).

Binding elements

The following three binding elements are qualities that should be embodied in all aspects of collaborative work. They can be thought of as enabling conditions for effective collaboration and are interwoven and support/build from one another:

- **Collaborative mindset**. A deep belief in the power of collaboration, a commitment to working through collaborative approaches, and an understanding of—and ability to benefit from and/or overcome—the unique opportunities and challenges that arise in working through collaborative rather than organizational pathways.
- **Inclusive culture**. A common sense of belonging and the valuing of all voices and perspectives within the landscape, coupled with a clear understanding that many voices and communities have been systematically marginalized in conversations around land and water, and that a justified legacy of distrust persists.
- **Meaningful relationships**. Recognition, honoring, and celebration of the humanness we all carry with us, and an intentional and caring exploration of how our individual humanness intersects with and connects to the humanness of those around us. It is, after all, through human relationships that collaboration is manifest.

Together, the nine elements of collaborative capacity are what allow a partnership or collaborative to achieve durable and inclusive environmental and social outcomes over the long term in the landscape in which it operates.

The study *What Does Collaborative Capacity Make Possible*? (Baxter & Land, 2023) further analyzes what collaborative capacity is and how it leads to improved conservation and stewardship outcomes. Based on expert perspectives gathered from in-depth interviews and focus groups with practitioners, leaders, and funders across the United States, it affirms the Collaborative Capacity Framework as well as a list of activities they enable. The study articulates why consistent, long-term investment in these elements is needed, and emphasizes contextual factors that affect collaboration (see Figure 4 below).

Expanded Collaborative Capacity Framework