



CONNECTICUT
LAND
CONSERVATION
COUNCIL

Mergers for Land
Trusts

Building Enduring
Land Trusts

Peter and Carmen
Lucia Buck
Foundation

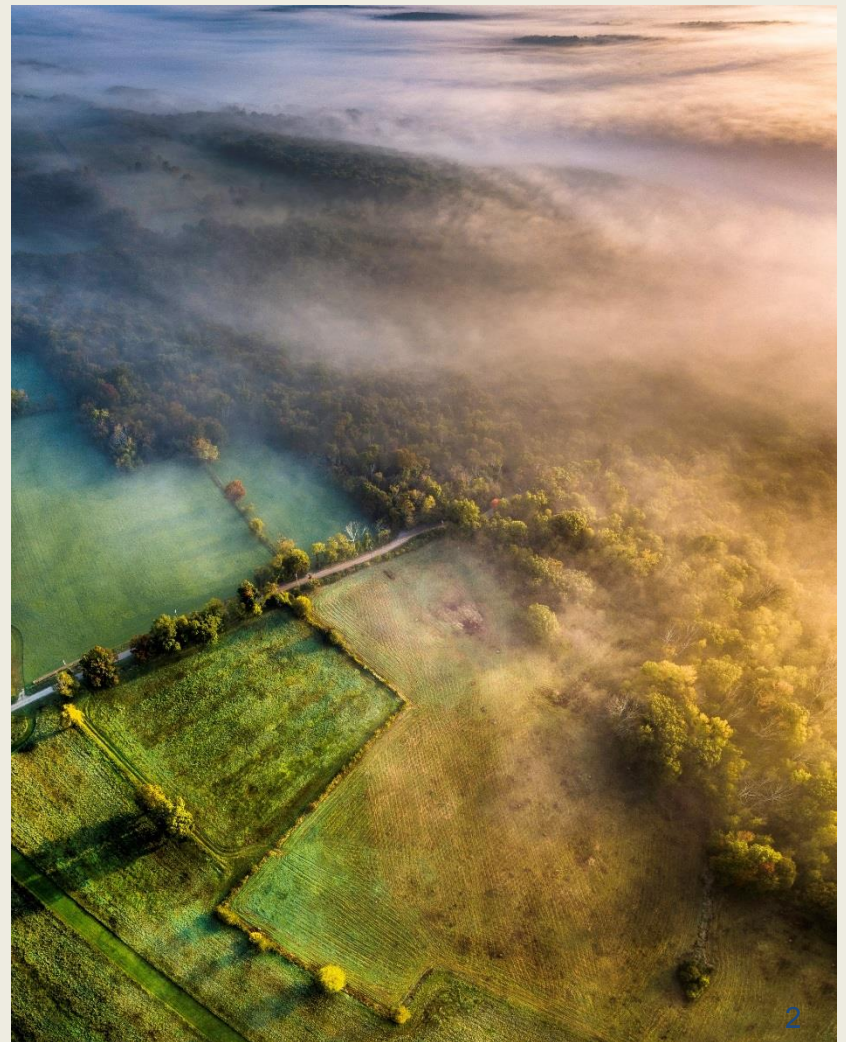
Advanced
Collaboration &
Merger Assistance
Program

CLCC
2020

CONNECTICUT LAND CONSERVATION COUNCIL OUR MISSION

CLCC advocates for land conservation, stewardship and funding, and works to ensure the long-term strength and viability of land conservation in Connecticut.

Johnson Farm, Steep Rock Association, Washington, by Woody Campbell, Grand Prize, 2018 Diana Atwood Johnson OSWA Photo Contest



TONIGHT'S AGENDA

- 1. Overview of Merger Assistance Programs (how we got here)**
- 2. Overview of Merger Process**
- 3. Q&A/Discussion**
- 4. Next Steps**

CT LAND CONSERVATION COUNCIL FOSTERING COLLABORATION

Stronger Together ...

- Regional Land Trust Summits
- Focus Groups
- Regional Advancement Initiatives
- Advanced Collaboration and Merger Assistance Program



BUILDING ENDURING LAND TRUSTS PROGRAM

PETER AND CARMEN LUCIA BUCK FOUNDATION

Merger Assistance Grants

- Encourages and supports mergers of land trusts in Connecticut.
- Awards may be used to cover costs associated with completing a merger (e.g. consulting and legal fees, accounting needs, and other costs.)
- Includes significant multi-year, general operating support to successfully merged organizations.
- Letter of Inquiry due May 27

www.ctconservation.org

JUST BEGINNING TO CONSIDER MERGER?

Feasibility Study Grants

- Helps organizations assess whether a merger is right for them.
- Work with a consultant/facilitator over the course of several months to determine the feasibility of formalizing a new relationship or structure.
- Memorandum of Understanding or other analogous written commitment by each organization's board, committing to the feasibility study process.
- Organizations that advance through this initial feasibility stage may then be eligible to apply to PCLB for a merger assistance grant.
- Contact Amy at abpaterson@ctconservation.org if interested in learning more and/or to schedule a Q&A with interested groups in your region.

FEASIBILITY STUDY PROGRAM

- Key indicators in decision to merge
- Process
- Factors contributing to success
- Obstacles

Photo Credit: Andy Nygren – Honorable Mention - 2018 Diana Atwood Johnson OSWA Photo Contest - Mountain View Preserve

WHY MERGE?

- **Protecting and stewarding more land**
- **Increasing organizational capacity and expertise**
- **Expanding service area**
- **Attaining greater efficiency in program delivery**
- **Reducing competition for limited resources**
- **Greater efficiency in program delivery**
- **Attracting more donors and volunteers**
- **Ultimately...achieve long-term financial stability and greater regional conservation impact.**



“Merging to create a regional land trust takes the administrative burden off of the small land trusts, while still allowing local representatives to do the ‘fun stuff’!”



Bob Canace, Senior Program Officer
The Peter and Carmen Lucia Buck Foundation

THE MERGER PROCESS

- Step 1: Preliminary Conversations
- Step 2: Evaluation (commit to process)
- Step 3: Negotiation (defining the consolidated organization)
- Step 4: Due Diligence (financial/legal)
- Step 5: Integration Planning (1st 1-2 yrs.)
- Step 6: Legal Execution
- Step 7: Integration

Source: An Introduction to Mergers for Land Trusts (Land Trust Alliance)

CONNECTICUT MERGERS

- **Five Town Land Trust & Vernon Land Trust: Northern CT Land Trust (1996) (Tolland County)**
- **New Canaan Land Trust & New Canaan Audubon Society (2014) (Fairfield County)**
- **Land Trust of Danbury & New Fairfield Land Trust: Candlewood Valley Regional Land Trust (2016) (Fairfield County)**
- **Weantinoge Heritage Land Trust & Brookfield Open Space Legacy, Inc. (2019) (Litchfield County)**
- **Weantinoge Heritage Land Trust & Naromi Land Trust (2020)**

ALTERNATIVE FORMS OF COLLABORATION

- **Program Collaboration (informal and short term)**
- **Strategic Alliance (formal agreement to pursue specific long-range objectives; e.g. joint conservation initiative; shared staff; administrative consolidation.)**
- **Consolidation with Autonomy (parent/subsidiary relationship, with parent having majority representation in subsidiary organizations)**

Source: An Introduction to Mergers for Land Trusts (Land Trust Alliance)

NEXT STEPS

- Check out resources at www.ctconservation.org
- Discuss with your board (we're happy to join you).
- Identify and discuss with potential partners (we're happy to join you).
- Contact CLCC by August 1 to move forward with the feasibility study program in 2021.

CONNECTICUT LAND CONSERVATION COUNCIL

Questions? Comments?

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www.ctconservation.org

#LoveYourCTLandTrust

@CTConservation

