Best Practices for Enduring Conservation

with a summary of a Five-Year Retrospective (2013-2018) of the Hewlett Foundation's Western Conservation Grantmaking Strategy

By:

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This nine-page report summarizes a more detailed retrospective assessment of the Western Conservation Strategy's last five years

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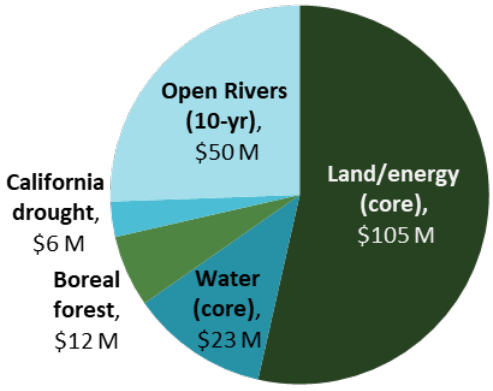
Retrospective Summary

The William and Flora Hewlett Foundation has been committed to conservation of the North American West for wildlife and people for nearly 50 years. Since 1969, the Foundation's Western Conservation grantmaking strategy has invested more than $445 million toward preserving biodiversity and conserving the ecological integrity of half of the North American West.

Every five years, Hewlett Foundation grantmaking program staff assesses progress and plans for the coming five years. This public report summarizes a detailed 68-page retrospective analysis of the last five-year strategy completed by Hovland Consulting LLC for the Hewlett Foundation. It recognizes impressive progress made by grantees (and more recently, challenges encountered) in the context of the five-year goals set by the Foundation's grantmaking strategy for 2013-2018[1] and distills best practices for enduring conservation that can be applied across the conservation movement.

Over the last five years, the Foundation invested $195 million (see chart) and directly supported over 50 nonprofit grantees. Two-thirds of the spending focused on three core strategies: 1) to improve land conservation, primarily through land-use planning and formal designations, 2) balance energy development with conservation, and 3) improve water and wetland habitat, primarily through work on rivers. Additionally, through separate time-bound initiatives, the Foundation supported grantees working to advance protection of the boreal forest in Canada, respond to the drought in the state of California, and support communities seeking to remove derelict dams via its Open Rivers Fund.



The grantmaking strategy had more than 70 direct grantees during the last five years, around 40 of which each received more than $500,000. Because of a lean staffing model at Hewlett, some of the larger grantees, who have much greater staff capacity, acted as re-granters. Grantees range from focusing on conservation issues in a single state or province to having a presence in 20 states or locations. States with the most grantee presence are Colorado, California, Montana, and Arizona. Sixty percent of grantees have a presence in Washington, DC. Many fewer grantees focused in Canada.

Across strategies, grantees worked closely with stakeholders ranging from ranchers to agency leaders (see right), built coalitions, pursued administrative and permanent protections for public lands, and achieved many conservation successes highlighted in this report.

In total, more than 220 people provided input to the retrospective through a detailed online grantee survey, conference calls and in-person convenings about individual campaigns, one-on-one interviews, and detailed outcome tracking, all of which was complemented by research.

The report below provides a summary of progress made and best practices for enduring conservation.

Disclaimer: Although some of the work described in this retrospective summary may reflect the passage of legislation, the Hewlett Foundation does not lobby or earmark its funds for prohibited lobbying activities, as defined in the federal tax laws. The foundation's funding for policy work is limited to permissible forms of support only, such as general operating support grants that grantees can allocate at their discretion and project support grants for nonlobbying activities (e.g., public education and nonpartisan research).

[1] The 5-year retrospective covers Mid-2013 through Mid-2018, noted for simplicity as 2013-2018 throughout.

Progress Made

Overview

The overall long-term goal of the Western Conservation grantmaking strategy is to protect at least half of the North American West. This goal was informed by a review of scientific literature and was intended to "ensure at least 50 percent of each ecoregion is either strictly protected or is in a mix of strictly protected and lightly used (and well regulated) areas."[2] Foundation staff believe this approach would result in preservation of biodiversity and the conservation of the ecological integrity of the North American West, landscape-scale protection, and resilience to climate change. For the purposes of the Western Conservation grantmaking strategy, Hewlett chose to adopt the EPA Level III ecoregions[3] in 2009, of which there are 53 across the West. This level is identified by scientists as appropriate to guide environmental monitoring and decision-making. The 53 ecoregions encompass 1.5 billion acres of public and private land (the extent of which is shown in the map on the cover).

The foundation aimed to support work that effectively conserved 50 percent of each ecoregion, with six exclusions.[4] Applying the 50 percent target to each ecoregion means that the **long-term goal of the strategy has been to fully protect around 715 million acres (distributed across ecoregions)**.[5] The concept of "full protection" recognizes that not all conservation actions have the same impact on the landscape and ecological outcomes. For instance, designating a wilderness area provides more protection than reducing off-road vehicles on the same area. Using certain assumptions, Foundation staff determined "fully-protected" goals for the West and assumed that equivalent permanent protection could be "built up" through several management actions applied on the same landscape.[6] *Given the complexity of this and the subjectivity of what makes a landscape "fully-protected" versus "mostly-protected," simplification of acreage goals may be warranted going forward.*

The grantmaking strategy also valued preserving **core areas of outstanding conservation value as well as intact corridors** connecting the core areas, which would allow for seasonal migrations of wide-ranging species and longer-term shifts in species distributions in response to climate change and other global changes. This core/corridor focus was also used as part of the decision-making framework during the last strategy to select priority strategies, though specific goals were not set for core/corridor protection.

At the start of the 2013-2018 strategy, roughly 55 percent of the targeted geography was protected.

As indicated in the figure below, **in the last five years, work by grantees improved conservation on 198 million (M) acres in the North American West**, fulfilling ~62 percent of the ambitious goals set in 2013. This is strong progress given that much of the past 18 months required groups to pivot to defense.

[2] 2013 (March), "Western Conservation Strategy Science Review for the Hewlett Foundation", Malcolm L. Hunter, Jr. and David S. Wilcove (internal Hewlett document)

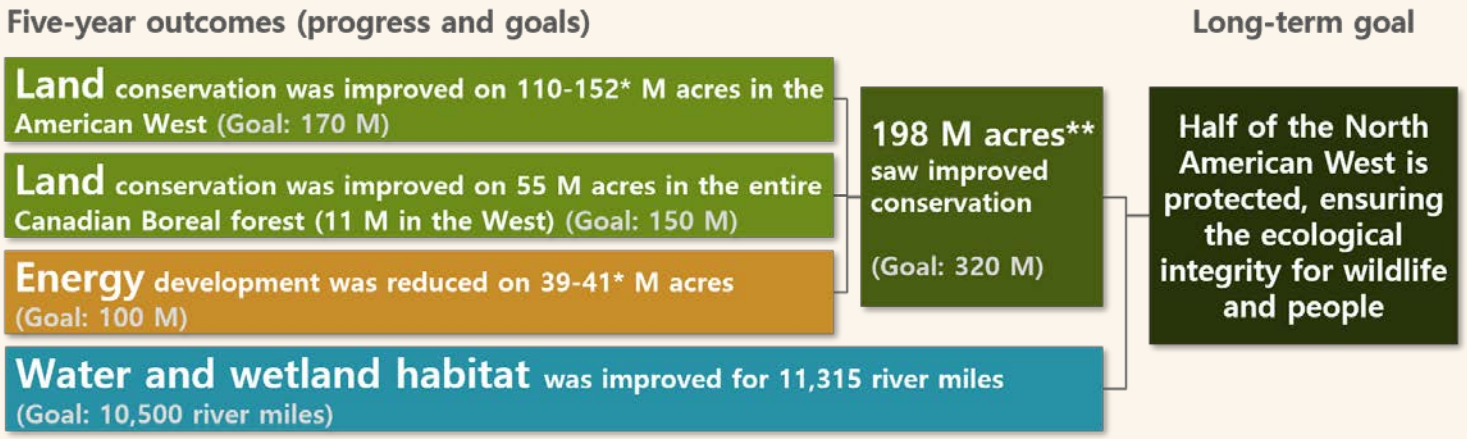
[3] https://www.epa.gov/eco-research/ecoregions-north-america. "Level II ecological regions are useful for national and subcontinental overviews of ecological patterns. Level III mapping describes smaller ecological areas nested within level II regions. These smaller divisions enhance regional environmental monitoring, assessment and reporting, as well as decision-making. Because level III regions are smaller, they allow locally defining characteristics to be identified, and more specifically oriented management strategies to be formulated."

[4] 31: Coast Range –Willamette Valley. 32: Columbia Plateau, 39: Snake River Plain. 41: S, Baja CA Pine-Oak Mountains – CA Coastal Sage, Chaparral, & Oak Woodlands. 42: Central California Valley, 23: Mid-Boreal Uplands and Peace-Wabaska Lowlands

[5] Accounting for the aspect that a few ecoregions are already protected beyond the goal and excluding six ecoregions (including one newly-exclude region around the tar sands)

[6] For example, areas managed as Lands with Wilderness Characteristics receive an effective protection of 80 percent and reducing off-road vehicles' impact receive an effective protection level of 15 percent.

Progress against outcomes and goals from the 2013-2018 strategic plan



*Range shows excluding any overlap to including overlapping acres across land/energy

**Less than the sum of land/energy accounting for overlap; Some acres outside the West don't contribute to the West's long-term goal

Land

Among the accomplishments that led to this significant conservation outcome was the work of grantees toward "the largest land conservation effort in U.S. history," as former Interior Secretary Sally Jewell referred to it, with unprecedented, proactive protections for greater sage-grouse habitat negotiated across several western states.

Other grantee successes included land-use plans that advanced significant protections alongside sustainable development in the boreal forest; the designation of national monuments in several states; the finalization of the Desert Renewable Energy Conservation Plan, which balanced development, recreation and conservation on public land in California's fragile desert; establishment by the U.S. Congress of new Wilderness areas, new off-road vehicle protections, and the advancement of sustainable forestry on lands managed by the Bureau of Land Management (BLM) in Oregon. Strong coalitions also stopped state legislatures from seizing federal lands, especially in Arizona, Colorado, Idaho, Montana, Nevada, New Mexico, and Wyoming.

Table 1 summarizes this work to protect land.

Energy

Grantees' support of the Moab, Utah, Master Leasing Plan is an impressive success story that brought together important players, including outdoor recreation, conservation groups, industry, city and county government, and federal agencies to balance energy development with recreation and conservation on public lands.

Other grantee successes related to "energy" include limiting oil and gas development through an array of land-use planning processes including seven other Master Leasing Plans, BLM resource management plans, and U.S. Forest Service land-use plans. Grantees also secured special designations in the National Petroleum Reserve and Eastern Interior in Alaska, created and defended the BLM methane rule, and supported the Interior Department's (short-lived) review of the federal coal leasing program.

See Table 2 for a summary of energy progress.

Table 1: Land goals and progress overview

(Note: there is an overlap between acres counted under the Land strategy and those counted under the Energy strategy)

Category	Outcome	Goal	Achieved
Land conservation is improved for 320 million acres (goal) Achieved: ~165 to ~198 million acres *(range shows progress excluding energy progress to including overlapping components)*	**Improve the conservation management of BLM lands**, addressing greater sage grouse habitat, lands with wilderness characteristics (LWC), off-road vehicles (ORV), and backcountry conservation areas (BCA)	150 M acres *(target included potential energy progress)*	110 - 152 M acres *(range shows progress excluding energy progress to including overlapping components)*
	Conserve the Canadian Boreal Forest (in the West)	150 M acres (no specific West target)	55 M acres protected (10.7 M in the West) *Note: future commitments for 98 million additional acres*
	Establish permanent protections through National Monuments and Wilderness Areas	10–20 M acres	5 M acres
	Improve funding by fully funding the Land and Water Conservation Fund (LWCF), establishing mitigation funding systems, and building state and local conservation funding sources	3.2 M acres	~1.7 M acres
	Advance conservation in southwestern deserts	0.3 M acres	2.1 M acres

Table 2: Energy goals and progress overview

(*Note: there is overlap between Energy and Land strategies, including acres-protected*)

Category	Outcome	Goal	Achieved
Energy development is reduced on 100 million acres (goal) Achieved: ~39-41 million acres *(range shows energy-only progress to higher estimate that includes Desert Renewable Energy Conservation Plan land actions)*	**Balance energy development with conservation** by extending Master Leasing Plans (MLP) across the West *(representing oil, gas, and energy limits on lands)*	85 M acres	21 M acres
	Give equal ground to conservation and energy development *(representing protections in areas with significant energy development)*	10 M acres	18 - 20 M acres
	Ensure that renewable energy projects are properly sited on public lands	10 GW of renewables permitted	5.8 GW known utility projects permitted, and estimated to 40 GW total sited potential
		19 M acres	101,550 acres known utility projects permitted, and 706,000 acres total sited potential

Table 3: Water and wetland habitat goals and progress overview

Category	Outcome	Goal	Achieved
Water and wetland habitat is improved for 10,500 river miles (goal) Achieved: 11,315 miles[7] *(this includes land designation benefits)*	**Restore crucial watersheds for cold-water fisheries**	4,450 miles	~3,910 miles
	Reform hydropower (dam relicensing, removal) for habitat benefits	4,780 miles	~1,770 miles
	Increase Wild and Scenic Rivers	1,260 miles	~40 miles[8]
	Explore opportunities to improve **southwestern desert water conservation** and **state water management**	-	~4 miles
	(The last strategy did not consider the protections offered to water through land designations secured by grantees across the West)	N/A	5,860 miles

Water

Grantees improved 11,315 river miles -- more progress than was made in the previous five years.

A coalition of grantees, farmers, sovereign Tribal Nations, fishermen, and other groups signed off on a new plan to begin to remove four major dams on the Klamath River in Oregon and California in 2020. Cold-water streams throughout the Rocky Mountains were restored and reconnected. Several derelict dams were removed with community support, including the nearly 100-year-old Eklutna Dam, restoring the Eklutna River in Alaska for the economic and cultural benefit of the Eklutna Native community, the Beeson-Robison Dam on Wagner Creek – a tributary in the Rogue River Basin in Oregon, and two small dams on a tributary in the Wind River Range in Wyoming.

While some of the other strategies toward this goal were unsuccessful (i.e. Congress failed to act on several potential Wild and Scenic river designations), the Foundation's river-mile goal was surpassed by counting benefits from adjacent land protection.

See Table 3 for a summary of water progress.

How did this progress happen?

A key part of Hovland Consulting's process toward completing this retrospective was to solicit input from Western Conservation grantees through an online survey, which invited grantees to share input on how they successfully secured conservation outcomes and modified strategies or tactics in the past year, and ideas to strengthen communications and collaboration. The survey had a 93 percent response rate.

We asked grantees about the importance of a wide range of tactics that include (but are not limited to) developing coalitions, crafting the narrative, writing papers, getting the word out through media, holding events, and member outreach. Looking across a wide range of main campaigns,[9] grantee input reinforced a key takeaway: collaboration is crucial. The most effective communication strategy identified across Western efforts was to have strong coalitions. Also important was developing a consistent, compelling message.

[7] Includes large and small rivers. Note that the total is slightly less than the sum of the rivers accounting for overlaps.

[8] Over 1,000 wild and scenic rivers were introduced in the 114th and 115th Congresses and over 650 miles are in negotiations with policymakers

[9] Main campaigns/case studies of sage grouse, master leasing plans, Klamath River restoration, stopping transfer of federal lands to states, national monuments, coal reform, protection beyond monuments (wilderness designations, state protections), other river work (dams, water markets, wild and scenic rivers, Colorado river), energy-related (renewable energy, methane rule), funding (Land and Water Conservation Fund, state, city, tax reform), mines, and other (collaboration, public surveys).

Collaboration was also important even if grantees were not in a coordinated coalition. Groups collaborate to share timely intelligence, messaging and communication strategies, engage local voices, and coordinate outreach and advocacy (especially at regional or national levels). Collaborations were most successful when complementary skill sets were employed, there was mutual dedication to the mission, a willingness to share credit, and a history of mutual respect.

Across grantee efforts, engaging with policy-makers (especially agency leadership and governors) was important to success. Key policy makers also included county commissioners and local federal land managers. In addition, engaging a mix of experts and diverse partners was also crucial. Economists and scientists were important. Key partners include farmers/ranchers, friends/local conservation groups outdoor recreation (e.g., Outdoor Industry Association), businesses, sportsmen and women, conservative leaders/groups, and green groups.

Grantees reported that policy-maker resistance, including opposition from some members of the U.S. Congress and, more recently, the new Administration, was the greatest obstacle to conservation outcomes. The Trump Administration has made clear that "energy dominance" is its priority for use of the nation's public lands, which has affected conservation designations, regulations, public input and policy in favor of extractive industries. In 2013, the Western Conservation grantmaking strategy recognized that a pivot to defense could be necessary in 2017 and 2018. Still, no one anticipated such a dramatic shift in the nation's politics.

While non-exhaustive, Hovland Consulting reviewed over 80 actions by the Trump Administration, agency leaders and Congress in relation to Hewlett's Western Conservation goals.[10] Actions range from pointed, such as the removal of the Canadian Lynx from the endangered-species list, to broad, such as executive order 13771 in the first weeks of the Administration ordering elimination of two regulations for every new regulation issued.

In the last year, the Administration shrunk the new Bears Ears and long-established Grand Staircase National Monuments in Utah by more than 2 million acres, eliminated the Master Leasing Plan process, suspended the Clean Water Rule issued under the Clean Water Act, advanced oil and gas drilling near sacred lands, national parks and in critical greater sage-grouse habitat, and reduced public input and opportunities for diverse stakeholders to engage in the leasing process.

In response to these threats, grantees, tribes, public citizens, business leaders, elected officials and many others have strongly emerged to support public lands via public events, earned and paid media, litigation, and other actions. Broadly, grantees have re-invested in communications and are using new media and litigation strategies to uphold protections for public lands and rivers across the West. Because many of the efforts over the past five years were focused on the national stage, some grantees told us that in hindsight, they realized that there was not enough attention paid to local support for conservation and pro-active efforts. Many grantees are now focusing greater attention at the local level, as are philanthropies, such as Hewlett, through their funding support. Moreover, grantees are focusing on implementation (much effort in the last strategy focused on creating policy, but not as much attention went into implementation and tracking outcomes).

[10] Sources include: The Wilderness Society's "Interactive: Tracking Trump's anti-public lands crusade," wilderness.org /interactive-tracking-trumps-anti-public-lands-crusade,; Popovich, Albeck-Ripka and Pierre-Louis, "67 Environmental Rules on the Way Out Under Trump." NY Times. 1/31/2018. www.nytimes.com/interactive /2017/10/05/climate/trump-environment-rules-reversed and Center for Western Priorities, "Not in their wildest Dreams" December 2017: westernpriorities.org/not-in-their-wildest-dreams

Best Practices for Enduring Conservation

A central aim of the retrospective process was to learn from the big successes, reflect on challenges and obstacles faced, consider what might have been done differently or opportunities that were missed (as asked directly in the survey). Hovland Consulting has identified 20 best practices for enduring conservation, grouped into five categories that describe the *approach* (take a holistic approach), the *how* (build strong coalitions and trusted relationships, expand capacity and tactics, prioritize communications and storytelling) and the *what* (pursue local conservation outcomes).

We encourage Hewlett and other charitable foundations to support nonprofit organizations in implementing the following best practices. Our advice to conservation advocates is to heed these lessons from the field to build stronger, more diverse and inclusive coalitions and advance collaborative conservation solutions that endure the test of time.

Categories of best practices for enduring conservation

A. Take a holistic approach

1. **Design solutions that address both human and natural landscape needs**. Define boundaries in a holistic way, such as an entire watershed, and consider the ecologically interconnected aspects of land and water. Actively consider the local economy (especially in rural areas) and how the proposed solution can benefit nature and people (including the restoration economy, working lands, or other benefits such as human health). Even when considering nature, don't separate out a single species (such as a bird), but consider the host of interdependent species.
2. **Find common ground with users of land and water (e.g., indigenous nations and ranchers).** Authentically listen to the goals and needs of others – including partners in coalitions, agency decision makers, and the 'opposition'. Define inclusive goals and priorities based on common ground.
3. **Preserve working lands in collaboration with ranchers and farmers.** Working with and finding compromise with a land owner who owns or operates on large swaths of land could significantly benefit the environment, whereas the environment suffers if a rancher is forced out of the profession and sells/subdivides her land. Subdivided parcels can result in poorly managed land and increased development that compromises habitat.

B. Build strong coalitions and trusted relationships

4. **Develop inclusive grass-roots campaigns with diverse participants across many dimensions (including livelihoods, ethnicity, gender, and age).** Prioritize equity, inclusion, and diversity in campaigns and coalitions in thoughtful, conscious ways. Conservation successes depend on working with farmers and ranchers, sportsmen and women, commercial fishermen and women, and others with connections to the land and resources. Native American tribes and First Nations can bring an important and interconnected view of land, water, and community and cultural health. Elevating the voice and inclusion of Latinos, Asian-Pacific Islanders and African Americans can help define priorities that reflect the diversity of people that live within the West. Increased outreach and mobilization of young voices can affect outcomes. Facilitate conversation and compromise. Ask open-ended questions of partners. Work toward collaborative, non-partisan, solution-oriented outcomes. Build trust over time.

5. **Work locally, with locals.** Community partners and local staff can "ground-truth" a proposed conservation solution, offer a realistic view of community needs, and provide valuable insights to campaigns and coalitions.

6. **Build long-term, trusted relationships with local policymakers.** Be positive and solution-oriented. Instead of coming to the table with a specific proposal, ask open-ended questions about priorities and offer ideas. Enjoy the outdoors together.

7. **Create strong, nimble coalitions** with common goals/vision, clearly-defined roles, a mix of expertise,[11] periodic communications (regular calls, in-person meetings), shared strategy, message discipline, trust among members, a system to track progress, and enforced accountability.

8. **Form durable relationships with tribal governments.** Indigenous communities may have senior land, water, hunting, and fishing rights; are permanent stewards; and have sovereign nation rights. Additionally, some tribes have significant capacity for restoration, monitoring, and science. Continuing to deconstruct colonial habits and attitudes will lead to improved outcomes for all.

9. **Show up for your allies.** Partners should be ready to support allies in moments of threat or need, even if it doesn't relate directly to shared conservation priorities. Publicly thank allies.

C. Expand grantee capacity and tactics

10. **Foster capacity to preserve the underlying bedrock legal frameworks and forums/venues** that bring people to the table, including the Endangered Species Act, Clean Water Act, hunting and fishing treaty rights, etc., but also allow space to come up with solutions that don't require courtrooms.

11. **Support perennial coalitions (a "standing army") and new and emerging leaders of coalitions so they are ready when opportunities or threats present themselves.** Celebrate successes and host coalition and relationship-building events.

12. **Commit to the long game.** With the assurance of long-term engagement, communities and advocates can build enduring relationships and invest in the activities that build alliances.

[11] E.g., public relations, professional resources, strategic expertise, technical and legal expertise, advocacy, messaging savvy, on-the-ground knowledge, insightful relationships, and access to policy-makers.

D. Prioritize communications and storytelling

13. **Exercise persuasive communications and be ready to shift the narrative when needed.** Use personal stories and images that include diverse users of the landscape. Include appeals to emotion, not just intellect. Frame the media narrative before the opposition can.
14. **Raise the profile of and use economic and fact-based arguments.**
15. **Cultivate social media expertise, data analysis, mapping and other critical skills that enable more effective communications.**
16. **Advocates should partner with influential voices** of governors, county commissioners, business leaders, ranchers, farmers, and other trusted messengers.
17. **Create the message, narrative, and communications approach *with* partners and share it** and best practices both with interested groups.

E. Pursue local conservation outcomes

18. **Pursue long-term protections through local land planning efforts.** This work takes time but can create state and local coalitions and build community support which will steward and advocate for landscapes over time. Grantees told us than an overemphasis on legislative solutions can waste valuable conservation opportunities.
19. **Start small with early-adopters or visionary locales and build from there**. The greater sage-grouse conservation effort started in Wyoming. The national methane rule started with state policy in Colorado. President Obama's use of the Antiquities Act started with 18-acre Fort Monroe in Virginia.
20. **Focus on implementation, not just the win.** This can help ensure proper execution and buy-in during the first few important years that a new conservation policy is in place. Implementation plans could include community science and monitoring, community events, and public education.

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About the Author

Hovland Consulting helps foundations and non-profits improve the world's environment and communities. We specialize in conservation of land, water, and the environment; clean transportation; climate change abatement; and energy efficiency. Using data-driven insights derived from strong analytics, research, modeling, expert input, and geographic information, Hovland Consulting helps clients make informed decisions; tell stories with compelling visuals, maps, charts, and video; track and improve performance; invest wisely to achieve goals; increase equity, inclusion, and diversity; and facilitate growth. Website.