

Cathance River Education Alliance & Brunswick-Topsham Land Trust: Stronger Together

Our History

Brunswick-Topsham Land Trust (BTLT) was established in 1985 to hold a conservation easement on a property in rural Brunswick, with the mission of conserving highly valued landscapes and resources. Cathance River Education Alliance (CREA) was formed in 2000, at the same time that BTLT took on the conservation easement at Cathance River Nature Preserve (Preserve). CREA's founders had a goal of using the newly established Preserve as a place to educate people about ecology and the environment.

BTLT incubated CREA in its nascent stage, serving as its fiscal agent until CREA received 501(c)(3) status in 2005. At the time, the desire to cultivate environmental education in the region was felt to be beyond BTLT's mission and capacity, but BTLT strongly supported CREA's formation. Then BTLT Board Member Rick Wilson became CREA's first Executive Director, and several people served concurrently on both Boards for a number of years.

Over the past 20 years, CREA and BTLT have partnered successfully on many projects. Our organizations have similar audiences — members who are drawn to learn about and protect the natural world. Today, our missions are so compatible that some in the community have found it difficult to distinguish between the two organizations.

Why this, why now?

In recent decades, recognizing that an engaged and environmentally aware populace is necessary to a healthy, sustainable future, BTLT has expanded its focus to include more community and educational programming. Its expansion into community engagement has led to more overlap in our missions and more opportunities to partner. As we have partnered on projects, we have come to recognize the benefits of working more closely together.

Our longstanding collaboration and periodic overlap in Board membership has produced an easy, productive relationship between our organizations. In 2020, BTLT and CREA co-located our offices at Brunswick Landing with the goal of facilitating collaboration and creating opportunities to share certain common administrative and other tasks. At the same time, challenges brought by the pandemic led both organizations to look at whether we were maximizing our resources to best serve the greatest possible number of people in the community.

Through extensive discussions, it became clear that joining forces as one organization would bring the greatest benefit. We can achieve administrative efficiencies, eliminate duplication of effort, and create opportunities for growth that will enable us to provide more, high-quality programs.

The timing is right to combine our organizations now. The leadership of both organizations is stable, supportive, and well positioned to make this change.

National, statewide and regional trends

Nationally, many nonprofits are evaluating the benefits of deeper partnerships with like-minded organizations. Foundations are increasingly interested in funding mature, stable organizations that

are sophisticated enough to recognize the advantages of combining forces when conditions are right.

There is significant funder support for consolidation in the nonprofit sector. In recent decades, funders encouraged collaboration between partner organizations, but many now recognize that the benefits of partnership cannot match those of full integration. Now, many funders are more interested in funding a single merged organization than two smaller, similar organizations. We have received two grants from foundations in support of our merger exploration and believe our combined organization will attract strong support from foundations for our programs.

A number of regional trends reinforce the wisdom of merging. In Maine and beyond, there is a shortage of experienced leaders due to accelerated retirement rates and other factors. Even larger nonprofits that offer better benefits are challenged to replace senior staff. Similarly, experienced and effective development professionals are in short supply and there is high turnover as development staff move to higher paying positions elsewhere. Finding good development staff is a chronic challenge for small nonprofits.

Staff retention is particularly important to the success of small nonprofits, and is especially challenging for small organizations that struggle to offer competitive wages and benefits. Turnover in the position of Executive Director, where longevity is key to successful fundraising and relationship-building with donors, is particularly challenging. Also, a larger merged organization provides more opportunity for flexibility in staff configuration.

Finally, the pandemic caused many institutions to re-evaluate how they do their work. It was a catalyst, a reminder that circumstances can change quickly. This became a factor in our own thinking. In response to the pandemic, many people turned to nature for solace and distraction. Both BTLT and CREA responded to the increased interest in the outdoors, sometimes in similar ways. This led us to think, "Are we being duplicative?"

BTLT and CREA weathered the pandemic by being nimble and innovative, but we have a heightened awareness that we will be stronger together. In our case, one plus one will equal three.

Conducting the Exploration

What steps did we take to get here - and why?

In 2019, CREA and BTLT formed a Work Group to begin exploratory conversations about opportunities for collaboration. The Work Group was comprised of several Board members and the Executive Directors from both organizations. The impetus for its creation was growing awareness of our mission compatibility, occasional program redundancy, competition for limited funding sources, and potential for administrative and programmatic efficiencies. Initial Work Group discussions led to a decision to co-locate our offices at Brunswick Landing to facilitate collaboration and to more intentionally partner on projects.

The pandemic slowed implementation of these decisions as CREA and BTLT dealt with program adaptations, altered staff schedules, and shifting workloads. Nevertheless, the move to adjacent office space in mid-2020 was significant, making conversation and collaboration by staff much easier. While our programmatic partnerships deepened, they also revealed that the greatest potential benefits require a deeper sharing of resources and expertise across all areas: program,

communications, development, finance, and administration.

In early 2021, when both organizations had adjusted to changes brought by the pandemic, the Work Group was reconvened and reconstituted to reflect changes in Board membership. We then engaged a consultant experienced in guiding organizations through exploration of all forms of collaboration, including mergers.

Over the course of a year, we conducted a thorough exploration of both organizations. We envisioned what we could accomplish as a unified organization. We shared information about our respective organizations and evaluated everything, including: governance (Board and Committee structure); staffing and volunteers; accreditation requirements; finances; assets; membership; and communications.

The Work Group reviewed the information gathered, thoughtfully identified and weighed the advantages and potential challenges, and presented its findings to both Boards in the fall of 2021.

Findings

The Work Group concluded that a merger is in the best interests of both organizations. Some of the benefits identified are outlined below:

- CREA will:
 - Retain its distinctive educational initiatives, with school, summer camp, and community programs continuing as before;
 - Gain access to many conserved properties and ecosystems in the Brunswick/Topsham area that could be used to host camp, school, and community programs;
 - Gain a larger audience for its community programs (BTLT membership of 1,100);
 - Gain access to BTLT's development, communications, and marketing expertise, resulting in more effective fundraising and communications in support of educational programs;
 - Consolidate administrative functions, freeing up time for more program delivery and fundraising in support of education;
 - Continue use of the CREA name as 'a program of BTLT' for its signature programs;
 - Benefit from BTLT's more robust employee benefits, which should enhance staff retention and longevity — an important factor in maintaining the high quality of CREA's educational programs;
 - Eliminate the challenge of finding Executive Directors who must possess a very broad skill set.

- BTLT will:
 - Eliminate the need to build a separate education program;
 - Gain programs of proven educational excellence that are already deeply embedded in area schools and curricula;

- o Secure staff with educational expertise that can be applied to its agricultural and other programs;
- o Gain use of CREA's Ecology Center as an educational center;
- o Expand the depth and reach of programs through relationships with schools, summer camp parents, etc.

Due Diligence

Following presentation of the findings, both Boards granted conceptual approval of a merger pending a 'due diligence' review of both organizations, including the legal, financial, and other aspects of a merger. We engaged a Maine attorney, experienced in conservation law and nonprofit mergers, to guide us through this final due diligence assessment. The attorney found no obstacles to a merger and sent a report summarizing his analysis to both Boards.

In December 2022, both Boards voted to approve a merger, pending approval by the memberships of our respective organizations. These votes were based on a strong belief that joining together will create an organization that is stronger, more effective, and better able to meet community needs.

In summary...

We believe this 'natural' alliance will create many opportunities to better serve the community. Our missions are highly compatible and our strengths are complementary. Together, we will be stronger and more effective. As one organization, we can achieve the following:

- More, richer educational programming. CREA's educational expertise and high-quality community programs can expand to BTLT's diverse properties, community garden, and farmers' market. Programs will reach BTLT's larger audience. BTLT will not have to expend resources to build a duplicative education program.
 - o CREA camp, which is at maximum capacity at the Preserve, will have the option of expanding to other campuses.
 - o CREA school programs can explore expanding capacity and content by utilizing BTLT locations that offer a wider variety of features and habitats.
- More education for the community. CREA staff can focus on education, unburdened of administration associated with maintaining a separate organization.
- CREA school and camp programs will provide BTLT with a point of engagement with families and youth.
- One-stop shopping for the community. Past duplication of effort will no longer occur and there will be no confusion about what CREA does versus what BTLT does.
- More in-house expertise. The larger, merged organization can support more specialized staff (e.g. development, communications, and administration).
- Consolidation of administrative, development, and communications functions, resulting in more effective and efficient back-office systems.

We believe that together, we can do more to secure and strengthen conservation and nature-based education for the communities we serve than either can do alone. We each value the educational mission and are committed to educational programming as a core element of the combined organization. BTLT and CREA both recognize that robust nature-based education is essential to

raising the next generation of conservationists, thereby ensuring that our lands and waters are carefully stewarded into the future.