

Have we moved beyond *Model or Muddle?* What's ahead for species conservation trusts in New Zealand?

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Early in 1987, a small group of Otago Peninsula residents from very different walks of life took what was then the far-fetched decision to launch a charitable trust dedicated solely to conserving yellow-eyed penguins. According to biologist John Darby, whose spare-time research was continuing what Lance Richdale had famously begun, the South Island's faltering yellow-eyed penguin populations were doomed to local extinction. The newly formed Department of Conservation felt unable to intervene. We decided that we would.

We didn't see any particular nobility in our claim for stewardship of the penguin's recovery. In truth, our motives at the time were very secular. Actually, they were unashamedly predatory. We wanted to plunder the corporate largesse flowing from New Zealand's rampant economic reforms. Our founding aim was to raise a capital fund of \$1.5m for yellow-eyed penguin conservation everywhere. We intended our Trust to be a bank which would underwrite the work of local people up and down the coast, freeing them from the long agony of just-in-time fundraising to concentrate on the things they did best and most willingly – restoring penguin breeding sites and managing predators.

Looking back, I think we felt more terrified than noble. To our knowledge, no-one had tried the Trust approach for a threatened species before. We agonised over whether our cause would qualify for charitable trust status. At stake too was the yellow-eyed penguin cause itself. Appealing publicly for funds was unavoidably an appeal for credibility.

Well, it didn't quite work out as we had planned. Founding trustees mortgaged their homes to pay for a comprehensive fund-raising feasibility study. But hardly had the ink dried on our Deed of Trust when the stock market crashed along with that very expensive study. It was a difficult time, not least because we were heavily in debt before we had started, and we found ourselves falling back on what we most wanted to avoid. That is, we were destined to become just another group struggling to fund projects of our own.

In the event, with the magnificent support of Mainland, our founding sponsor, and the support of so many other businesses and good people – some assisting us here today – we have managed to be both: a funder of others' research and field projects, and a manager of our own conservation initiatives. Naturally we would like to do more of both. But that's a story for another day.

The point I want to make with this story is that right from the start we've had to respond to external factors and needs by asking unexpected things of our trust. In 1987, we could hardly have predicted how highly diversified our trust activities would become, or indeed how far they would reach into communities of all kinds, here and abroad.

Ours – like yours – remains fundamentally a biological mission requiring tenacity and ceaseless innovation. But conservation is ultimately a social and political enterprise. Over time, managing the complex human dimensions of our mission has propelled our trust into here-be-dragons country where we've had to adapt or fail.

That will be no less true for tomorrow. As responsibility for the stewardship of our natural heritage shifts more to groups like yours and ours, we will face challenges of a non-ecological kind which have to be met. Our operating environment will change accordingly and change us too.

We will have to adopt new modes of interaction with allies and unfamiliar audiences, develop new coalitions of interest, and negotiate a good deal more amongst ourselves and with others for space, credibility and resources. Adaptations to these changes are sure to affect the character and extent of what trusts do on the ground.

In 2007 (our twentieth year), we paused to consider what lessons we could convey from our experiences for the benefit of others in the years ahead. This conference has sprung from a maturing of our thinking then.

In a short paper entitled *Model or Muddle? How well does the charitable trust concept serve species conservation in New Zealand?* we evaluated the strengths and weaknesses of the trust as a way of conserving biodiversity. Trusts were by then mainstream but could they be relied upon to do what New Zealand's threatened biota require in the long-term? Especially if operating in environments increasingly crowded with trusts competing for public favour and funding.

In the next few minutes, we'd like to summarise those assessments for you. Then we'll speculate on what we might ask from the trust model in the years ahead.

Let's consider trust strengths first.

Trusts are purpose-built to stimulate investments in conservation. They use the structures and inducements of charitable status to do this. They have powerful incentives to forage far-and-wide for those investments. To win the public approval which is vital for support and funding, they must succeed at what they do. People

like to back winners. And, as we all know, success has an unforgiving hunger for resources.

Trusts are familiar to public, corporate and private sources as legally constituted investment channels. The trust platform is particularly well suited for the mutually rewarding exchange of benefits associated with cause-related marketing.

Our association with Mainland was a formative example of cause-related marketing for a single species. Our 24-year relationship has shown other corporates that support for citizen-led conservation initiatives can be risk-free and very profitable.

Over the last two decades, trusts have shown that they can appeal very effectively to a broad range of investment interests. To win approval and support from ambivalent audiences, trusts have to make conservation sexy. The constant need to court public good-will and capricious funding obliges us to be highly creative and audacious in our advocacy and marketing. Memorable appeals are sure to reach further into public consciousness and corporate boardrooms.

Trusts have the right attributes and languages to mix with different communities. Our roots are set in community soils, we live in those communities and - as custodians of local treasures - we fit there more seamlessly than the State does. Without the same baggage and arcane languages. In these diverse social contexts, trust autonomy and our self-styled mandates free us to adjust our messages and ways of working to local mood and conditions.

Most importantly, trusts have shown how proficiently community effort and sentiment can be mobilised. Carrying a banner for species makes trusts recognisable rallying points and sinks for otherwise unrequited community interest in conserving those species. The efforts of like-minded people and their institutions are concentrated accordingly and participation gives strength and legitimacy to their stewardship instincts.

The spin-offs for communities are very real too. Our Trust could not have achieved much at all without elevating yellow-eyed penguins to iconic status in public perceptions of our natural heritage. They are transacted daily in our currency. Along with Taiaroa Head's albatrosses, our penguins have become synonymous with the Otago Peninsula experience. In southern New Zealand, they are now distinctive symbols of community identity. Our penguins adorn buses, buildings, billboards and local publications. Penguin tourism is flourishing.

Trusts confer at least three further benefits for conservation.

First, they can operate below the State's budgetary cut-off points, attending to biodiversity which might otherwise be fatally neglected.

Second, they can manoeuvre free from ministerial preference or political expediency.

Third, they can function with a single-mindedness which larger institutions might envy. They can deploy more resources more narrowly to meet conservation needs. It is undoubtedly true today that without trusts devoted to specific places or biota, work of the necessary type and intensity would not be undertaken.

Well, that's the good stuff. Taken together with truly uplifting successes throughout New Zealand, these benefits convey the impression that the trust is a durable, energetic, driven instrument which can punch well above its weight.

But is this so? What did we think were the trust model's vulnerabilities?

In sum, we considered back in 2007 that the model could be an unduly fragile conservation platform, one possessing weaknesses inherent in its special character and needs. We felt that these weaknesses would become more and more exposed by the struggle to survive and flourish in a congested market-place for public favour and resources.

Parochial aims and mandates and the need to project distinctive identities would, we feared, militate against longevity, continuity and cohesion in community-based conservation.

We argued that despite their public-good motives and rhetoric, trusts are by necessity creatures of self-interest. They must attend to their survival needs first before they can do anything else. Any who do not are jeopardising their causes.

What are these needs and how do they make trusts vulnerable?

Most conservation trusts function on slim safety margins. As I have said, their funding is related directly to measures of public approval, and that approval is a fickle, idiosyncratic basis for life and living.

Causes affect visibility and endorsement. Both are critical determinants of survival and success. A popular cause is good. An obscure cause is a risk. The more specialised the cause, the smaller its audiences and funding catchments are likely to be. Failure to find and hold support has predictable consequences for project continuity and trust life-span.

The reliance on public approval compels trusts to adopt selfish and introverted (or conversely, insufferably extroverted) forms of behaviour. To distinguish themselves from others in the competition for support of all kinds, trusts must make expensive investments in their profiles, reputations and identities. The instinct is to protect these investments and other advantages in the market-place. These selfish behaviours force trusts away from their founding values and modes of operation. And they deprive their causes of sorely needed time, effort and funds.

The singular importance of profile and integrity subdues political activity. Trusts can ill-afford to alienate supporters, associates or sponsors through activism or taking

sides in fraught debates. They tend therefore to act as conservation moderates, no matter how fiercely the fires burning in their bellies would have them do otherwise.

Given what is at risk, trusts are very sensitive to the volatility and conditional nature of funding. Grants and sponsorships are commonly short-term and project-specific. Untagged funding is very hard to come by or sustain. Without such funding, trusts struggle to cover pumps-and-bellows costs or pay the salaries of staff who translate ambition so very effectively into action on the ground.

What did we think these sensitivities meant for the shape and conduct of conservation in the future?

Conservation needs all the friends and amicability it can get. It does not need survival-of-the-fittest struggles among its champions.

Parochial agendas and operational autonomy predispose conservation to *ad hoc* management. Among other things, this may result in misdirected flows of scarce funding within the sector. For instance, the help given by a well-meaning trust to its favoured species might be better devoted to others in more critical need. Likewise, species may receive forms of remedy which appeal to supporters but which are unimportant to their needs.

On a larger scale, independent agendas heighten the risks New Zealand faces in moving from a largely co-ordinated approach to conservation – led by the State and focused generally on ecological imperatives – to one which is inherently less co-ordinated and intruded upon to a new degree by self-centred behaviours related to survival, strutting one's stuff and self-promotion.

There is the question of course of who will look after the invisibles and the untouchables – the species and places which do not appeal to the public. How will they fare if the State cannot afford to look after them and trusts cannot afford to take a risk on them?

Trusts operating independently are also distanced from healthy normative influences which foster quality and relevance in conservation work—collegial influences such as peer-review, risk-sharing through collaboration and commitment to collective strategic planning.

Ad hoc may become more accentuated if the powerful custodial beliefs invoked through community participation are presumed to confer *de facto* ownership or trespass rights over species or places. The concept of branding implies the same sense of ownership.

Lastly, there's the question of staying the distance. In New Zealand, trusts have not yet proven to be ephemeral, but their sensitivity to transient conditions exposes their projects to the risk of discontinuity or collapse. Falling short harms the cause.

And as we all know in our waters, our critically threatened species cannot take stop-start management.

So far, New Zealand's environmental community has developed few agreements on how to manage these potentially dislocating threats to conservation. Whose job is it to set the standards and insist upon them? Whose job is it to get the horses all headed in the same direction? Who will manage the loose cannons? Who should play mentor? Arbitrator? Safety net?

Let's pause a moment. This all seems a very dismal prognosis. I can see that some of you have razors hovering over wrists. Over *my* wrists perhaps. Are we overstating the risks? Will the trust model muddle conservation so very badly?

At the Yellow-eyed Penguin Trust, we don't think so. Whatever the risks, they are worth taking. And besides, as biodiversity declines steepen into global catastrophe, we have no choice. The value we see in dwelling on the model's frailties like this lies in compensating for them and understanding how they shape behaviour and relationships in our trade.

On balance, we are in no doubt that, despite its vulnerabilities, the trust approach has a very productive future. We predict that it will shape much of what is done in the sector in the years ahead, and how it is done. Now that the model has proved itself as a very effective means of doing conservation, let's make it work some more magic.

To conclude, we'd like to suggest several directions in which we think trusts might evolve, either by choice or necessity.

Let's start with a proposal which is quite challenging.

Stewardship

There may soon come a time – if it hasn't already – when trusts see advantages in acquiring exclusive stewardship rights over, say, a threatened species. Any such rights would have to be negotiated with the State of course, since it exercises the sole statutory duty of care for our natural heritage. The State is unlikely to surrender its authority outright but it may delegate it.

We see precedents for exclusive stewardship in the *kaitiaki* roles negotiated over *taonga* between the Crown and iwi.

What would be the purpose and effect of exclusive stewardship? For the State, one less species to worry about. Greater certainty perhaps that the species is in safe hands. Or conversely, out of more problematic hands. A clearer line of accountability maybe, and a clear leader in any collective arrangements for a species's recovery.

Aside from freedom of action, the advantages for trusts relate to visibility and establishing a distinctive identity. Marketing the cause would benefit. The mana so essen-

tial for attracting support would come from State confidence in the trust, from the authority conferred by the State – a form of credentialing – and from the power and prestige acquired in being the go-to agency for a species's affairs.

I can feel some of you bristling now so we'd better deal with the perils in partitioning species management in this way.

For the anointed trusts, there is the fearsome burden of raising resources alone. For the species, there is less long-term certainty if its only guardian doesn't retain the necessary know-how over time, or fails altogether. The passion which sustains volunteer groups may blind them to the need to adapt. Most of all, there is the grave risk of alienating other groups – present and future – who may share or claim an interest in the species.

At risk too are the 'commons' on which flourishes a vital public-good safeguard against naked self-interest; that is, the principle that our shared natural heritage belongs to everyone but belongs to no-one.

Branding

Branding is partitioning by stealth. Yet increasingly, we believe, trusts will find themselves obliged to create attractive brands for their causes, first because the marketplace for resources expects this, and second because the brand creates an instant – one hopes, lucrative – association between cause and trust.

Uncomfortable as it may be, branding is symptomatic of the way conservation is being commodified by New Zealand's neo-liberal agenda. The competitive undercurrents in community-based conservation will certainly not foster immunity to that. Trusts must adapt to this environment or risk fatal anonymity.

Commercial ventures

Free-standing commercial ventures are not new for charitable trusts of course. Nor sadly are the hazards of relying on them for a steady income. In the future, however, we may see trusts developing forms of commerce which do not involve large capital investments in sedentary assets. Ecosanctuaries do an absolutely splendid job for advocacy and awareness but many operate uncomfortably close to red side of the ledger.

Trusts might consider hosting major events which have little obvious relevance to their work. We would dearly like to establish a nationally defining event on Dunedin's social calendar.

In general though, we consider that tomorrow's ventures lie in developing a more placental relationship with the nature tourism industry, to share the benefits of lower-key, self-managing wilderness experiences for visitors. We have debated just such a venture for the Otago Peninsula but of course I can't tell you what it is.

See how readily we lapse into protecting our advantages?

Quantifying the benefits of what we do

Any such ventures should go hand in hand with the efforts trusts must make in the future to quantify the social and economic benefits of their achievements for nature. Quantifying these pay-offs will require trusts to invest more concertedly in the social and economic sciences for systematic assessments of benefit.

Succession planning

Finally, the pressing matter of succession planning will oblige trusts to consider how best to converse with younger generations. Not only will we trustees have to adopt contemporary forms of social messaging, but we will need to understand the next generation's motives for engaging in conservation. They may not be same as ours.

We will have to reframe our stories to communicate in languages which tomorrow's trustees understand and warm to. It may be that we find ourselves brokering rock concerts. How far is *that* from managing yellow-eyed penguins on some distant coastline?!

Bags we have Lorde first. Actually, I think I'd rather have Annie Lennox!

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