



Land Trust Alliance

All-Volunteer Land Trusts

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Executive Summary



All-volunteer land trusts (AVLT) are important to local land conservation throughout the country and are a large segment of the Land Trust Alliance's constituents. Defined as having one part-time staff or less, AVLTs comprise almost 60% of the approximately 1,700 land trusts identified by the Land Trust Alliance (Alliance) in the U.S. In order for the Alliance to better understand and support this group, Conservation Impact conducted research and developed recommendations to strengthen the Alliance's support of AVLTs.

The research for this project used primary information sources such as surveys, interviews, and focus groups, reaching almost 300 organizations and individuals, and then followed up with secondary sources. Note that although this is a large group of respondents, it represents less than one-third of the approximately 975 all-volunteer land trusts identified by the Alliance. We assume that responding land trusts have greater capacity and/or motivation to participate in the study than those that did not respond. We cannot draw conclusions about the nonresponsive group of land trusts and we recommend that Alliance regional staff reach out to those organizations to better understand their circumstances, aspirations, and organizational development needs.

All-volunteer land trusts have protected 477,500 acres of land through conservation easements and acquisition. This is just 1% of the 47 million acres of land protected by all land trusts as of the end of the year 2010 and 14% of the 50,100 parcels protected in fee or by easement (National Land Trust Census 2010). The majority of all-volunteer land trusts have completed five or fewer conservation easements / restrictions and five or fewer fee simple acquisitions. Most AVLTs anticipate doing three or fewer projects in the next three years or cannot predict how many they will do. Much of this uncertainty is tied to project funding and the limited capacity of volunteer board members to devote the time and expertise needed to complete complex projects.

The majority of AVLTs say that they are all-volunteer due to lack of resources to hire staff. With nearly 50% of the organizations having annual budgets under \$20,000 and about 75% under \$40,000, funding is a constant concern and barrier to accomplishing land projects and organizational development. Yet AVLTs aspire to conservation excellence, with only 9% deciding not to become accredited.

As a group, all-volunteer land trusts have some similarities with staffed land trusts, including passion for their work, as well as concerns about board recruitment and

development, resource development, and for most, how to add more staff. A significant difference is the pace of their work. Without staff, the work of these organizations progresses as quickly as their volunteer boards and other volunteers can accomplish it. In addition, some, but not all AVLTs perceive the Alliance as misunderstanding their importance and specific needs and see this reflected in products, services, and standards that seem to be designed for larger organizations.

This report looks at the AVLT cohort through a marketing lens that segments all-volunteer land trusts into three main target markets, with two sub-categories. The principle segments are Overwhelmed, Motivated, and Moving Forward, and they are further divided into sub-groups based on whether or not they aspire to add staff in the future. The principle difference among the three segments is the degree to which leadership is developed and is strategically moving the organization forward, seeking organizational development and conservation opportunities, and striving for excellence.

We make four recommendations to provide guidance to the Alliance on customizing and refining programs to better serve the AVLT market and aligning communications and messaging to meet their specific needs. Services and programs that the Alliance currently offers contain relevant and important information for all-volunteer groups, but the way in which that information is presented, the size and pace of training and evaluation programs, and the communication methods used to reach the land trusts needs to be more closely aligned with the operating reality of the target markets.

The four recommendations are:

1. Create a product and service line for all-volunteer land trusts that gives them the tools, time, and guidance they need to advance their organizations.
2. Eliminate cost and access barriers to using training materials and services.
3. Develop the field capacity necessary to deliver the all-volunteer land trust line of products and services.
4. Develop and implement a marketing and communication plan to engage all-volunteer land trust audiences to advance organizational excellence and sustainability through the learning services offered by the Alliance and its partners.

Addressing the organizational development needs of the ALVT community provides a significant opportunity for the Alliance to advance conservation excellence, reduce risk to the land trust movement, and build support for the Alliance's work through stronger, more sustainable members.

Introduction



Of the estimated 1,700 land trusts in the United States, 975 (57%) are all-volunteer land trusts (AVLT). These unstaffed or lightly staffed organizations are a key audience for the Land Trust Alliance's (Alliance) efforts to increase the pace, improve the quality, and ensure the permanence of land conservation in the U.S. As mostly locally-focused organizations, they have protected 477,500 acres of land, about 1% of the land protected by land trusts across the country and 14% of the parcels protected by fee or conservation easement (National Land Trust Census 2010). However, these statistics do not reflect the importance of AVLTs to conservation, recreation, environmental education, and environmental planning and policy in their communities or the passion of their volunteers and supporters for their mission.

All-volunteer land trusts, as with all land trusts, represent a risk to the land trust community to the extent that they do not employ best business practices or have adequate resources to steward and defend their conservation easements and fee properties in perpetuity. If they fail, they jeopardize the entire community. But if they succeed, they strengthen the land trust movement and contribute to conserving the places people love.

To reduce risks to private land conservation and advance the capacity, conservation impact, and sustainability of land trusts, the Alliance provides many resources to land trusts, including all-volunteer organizations. Services, products, and programs are provided through a variety of media, activities, and venues designed to meet the needs of land trusts at different stages of organizational development and learning. However, feedback from all-volunteer land trusts and observations by Alliance staff, consultants, funders, and others indicated that the resources offered by the Alliance were being underutilized by all-volunteer land trusts and that efforts should be made to bridge the gap.

In order to better understand how to serve this segment of the land trust community, the Alliance engaged Conservation Impact to conduct an analysis of the relevance of Alliance offerings to all-volunteer land trusts and develop recommendations to improve the utility, accessibility, and use of its products and services by those land trusts. Conservation Impact conducted extensive research through online, telephone, and in-person methods to better understand the operations, aspirations, and organizational

development needs of the all-volunteer land trusts, as well as their information and training needs and preferences. We then developed market segment profiles and recommendations for the Alliance to develop and align its programs, products, services, marketing, and communication for those audiences.

It should be noted that while many clear patterns emerged from the research, less than one-third of the AVLTs in the Alliance's database responded to our inquiries. We assume that non-respondents had less capacity and/or interest in participating in the study and may have different opinions than those expressed by the land trusts that did participate. This bias in respondents should be kept in mind throughout the report.

Methods



Conservation Impact conducted the research for this project from April through July, 2012. Through online surveys, interviews, and focus groups we received input from 271 land trusts and 21 stakeholders knowledgeable about the all-volunteer land trust community. For purposes of this study, an all-volunteer land trust is defined as a land trust with no more than one part-time staff person.

All-Volunteer Land Trust Cohort

The first step in the research process was to identify the cohort of all-volunteer land trusts for the study. The Alliance used 2010 National Land Trust Census and other data, Alliance regional staff and state land trust association staff knowledgeable of the land trusts in their regions, and land trust website information to identify cohort members.

The Alliance identified 975 land trusts that appeared to be all-volunteer, representing 57% of the 1723 land trusts in the country for which the Alliance had some information. Email contact information was available for 874 (90%) all-volunteer land trusts and 2010 Census data or similar information was available for 863 (89%) organizations, though the data were often incomplete.

Participant Selection and Outreach

The Alliance enlisted the assistance of state associations and service centers to verify land trust information and to reach out to their members to complete the online survey. The Alliance identified land trusts and stakeholders for all interviews and for all focus groups, except the focus groups held in Massachusetts.

Massachusetts Land Trust Coalition (MLTC) graciously provided support throughout the research process. It reviewed and updated land trust contact information, provided outreach and support for two in-person focus groups in Massachusetts, including arranging for the venues, and it coordinated with the Alliance to invite several nearby Massachusetts land trusts to the Connecticut focus group. MLTC also provided feedback on survey questions and the survey email invitation, and followed up with outreach to its constituents to encourage them to respond to the online survey, resulting in a 57% response rate from that group.

Online Surveys

We conducted two online surveys to gain information in an efficient, if less-nuanced manner than was gained from the interviews and focus groups discussed below. Please refer to Appendix II for the survey questions. The first online survey was designed for the all-volunteer land trust cohort and focused on organizational demographic information, uses and preferences for information and learning resources, and challenges and aspirations for the organization. The survey was sent to 864 land trusts. The survey that was sent to a subset of 117 land trusts in and near Massachusetts included six additional questions from MLTC. Overall, we received responses from 258 land trusts or 30% of the potential participants. Of those responses, 67 (26%) were from the MLTC group and 191 (74%) were from the national cohort.

The second online survey queried Alliance regional directors and staff about their experiences and lessons learned from working with all-volunteer land trusts. Eight staff responded, providing input from all four regions.

Interviews and Focus Groups

We used interviews and focus groups to gain insights into all-volunteer land trust culture and operations, aspirations and challenges, and organizational development. Please refer to Appendix II for the questions. Representatives from 42 land trusts participated in focus groups (26) or individual interviews (16). Three in-person focus groups were conducted in the Northeast Region, two in Massachusetts and one in Connecticut. One telephone focus group was conducted in each of the Alliance's other three regions. All individual interviews were conducted by telephone. We also interviewed 15 key stakeholders, including Alliance board and staff members, by telephone to understand their perspectives on all-volunteer land trusts and how the Alliance can best serve that market sector.

Caveat

A caveat about the data gathered through the surveys, interviews, and focus groups: given that the response rates to our requests for participation were not 100% and that responses were self-motivated, we have information from a subset of the all-volunteer land trust community that is not a random sample. Most likely, these responses are biased toward organizations that have the capacity to respond, have readily available organizational information, and/or are motivated to participate.

Secondary Research

Secondary research included reviewing existing Alliance programs, materials, and 2010 National Land Trust Census data; discussing methods and issues with Alliance staff and committees; reviewing internal documents, including the Alliance's white paper, Next Generation Services Strategy: Program and Delivery (2008), the research data appendix to that study developed by the Peter Szabo team; and notes from roundtables conducted with Massachusetts stakeholders at the June, 2012, Land Trust Alliance board of directors meeting.

Findings



Below are the consolidated findings from the research. This information represents a synthesis of the data and responses gathered from all sources to provide an overview of all-volunteer land trusts to inform the analysis and recommendations. Please refer to Appendix I for further details. The number of respondents varies among questions in both the Alliance database and online survey.

All-Volunteer Land Trusts Overview

Land trusts support conservation in a variety of ways and all-volunteer groups are not different from staffed land trusts in the range of ways they engage in conservation work. These organizations protect farms and ranches, cultural features, greenways, trails, natural habits, endangered species, local and regional parks, scenic vistas, and other areas of importance to their communities. Some are providing environmental education, advancing conservation values in local land use plans and public policies, creating and maintaining trails, and engaging people with nature in many ways.

All-volunteer land trusts serve many of the same roles and face many of the same struggles that staffed land trusts do. Many all-volunteer land trusts are the face of voluntary, private land conservation in their communities and regions. Others are struggling to develop or maintain relevance and community engagement. Many are striving to add staff capacity and others are deliberately pursuing an unstaffed, all-volunteer model. Some are striving to achieve national standards, while others feel those are only for large organizations or they are too busy doing conservation to attend to standards except as needed for operations or specific projects.

As with many staffed organizations, board members of all-volunteer land trusts often feel isolated, lack a peer network for support, and are not fully aware of the resources provided by the Alliance or other organizations that support nonprofits. A significant difference between staffed and unstaffed organizations is the peer interaction and support that staff develops with other land trust staff either directly or through membership organizations such as the Alliance and state land trust associations.

All-volunteer land trusts perceive themselves as different from staffed organizations, but feel that their unique concerns and realities are often overlooked by the Alliance. They feel that the Alliance does not understand the important roles they play in their

communities and that the models and examples used by the Alliance in its training materials and communications are based on staffed organizations, not reflecting the pace, capacity, operations, and value of all-volunteer groups.

As a segment of the land trust community, the all-volunteer land trust cohort comprises approximately 57% of all land trusts tracked by the Alliance and approximately 41% of the Alliance's 1200 members. Fifty-eight percent of the 863 all-volunteer land trusts with data in the Alliance database are members. Both members and nonmembers responded to the online survey.

Geographic Distribution

The geographic representation of all-volunteer land trusts is highly concentrated in the Alliance's Northeast Region. Of the 975 organizations identified by the Alliance, 536 or 55% are in the 11 states and the District of Columbia in the Northeast. Within the Northeast, Connecticut, Massachusetts, and Pennsylvania account for more than half of the region's all-volunteer land trusts. Across the country, just six states: Connecticut, Massachusetts, California, Pennsylvania, New York, and Maine, account for 50% of all all-volunteer land trusts. All-volunteer land trusts outnumber staffed land trusts in all Alliance regions except for the Western Region.

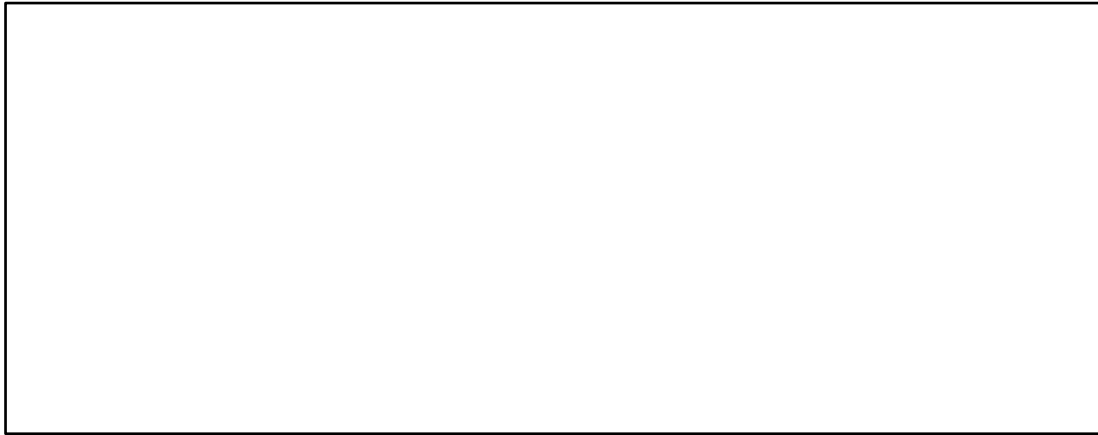
Region as Defined by the Alliance (# states & DC)	Regional % of All-Volunteer LT	Number of All-Volunteer LT	Number of Staffed LT
Northeast (11 + DC)	55%	536	243
West (14)	19%	188	216
Midwest (13)	14%	136	108
Southeast (12)	12%	115	92
Total (51)	100%	975	659

Many all-volunteer land trusts have small service areas with too few resources to sustain an organization over time. In the Northeast, land trusts frequently serve only one town and elsewhere they may serve a township, city, or county. Focus group participants in the Northeast talked about the perceived cultural differences between adjacent towns and the barriers they posed to collaborating with neighboring land trusts or merging to form a larger organization with a stronger support base. In Connecticut, one focus group

participant characterized the extreme localism by saying that to land trusts in eastern Connecticut, if you are a land trust in Goshen, you may as well be in Kansas!

All-Volunteer Intention

When asked why the organization was all-volunteer, the largest response (60%) was that they do not have adequate funds to support staff. This response is aligned with reported



annual budgets for all-volunteer land trusts, which range from \$0 to one land trust reporting well over \$1 million. However, about half (48%) have annual budgets greater than \$0 and less than \$20,000. Only about a third of AVLTs have at least one endowment or reserve fund for monitoring, stewardship, legal defense and/or an operating reserve.

Accreditation for All-Volunteer Organizations

All-volunteer land trusts are underrepresented among accredited land trusts, with only ten (1.2 %) accredited. This represents 6.3% of the 158 accredited land trusts. The Alliance data set showed that 22% of AVLTs planned to pursue accreditation. Similarly, from the online survey, 21% are likely to pursue accreditation, 45% are likely or somewhat likely to do so, and 9% have decided not to become accredited. However, we do not know the accreditation intentions of AVLTs that did not respond to the online survey.



Land trusts that were accredited or were preparing for accreditation, starting with an organizational assessment against Land Trust Standards and Practices, frequently commented on what they were learning from the process and how their organization benefited from improving their systems and practices. When asked directly about the accreditation process and whether or not it should be changed for all-volunteer land trusts, these organizations said they wanted to meet the same standards as other land trusts. They also recognized the value of meeting accreditation standards to their operations, their status in their communities, and their ability to attract investments to their work. They did, however, note that it will take longer for them to work through the accreditation preparation process than it would take a staffed organization.

Land trusts also expressed concern with the cost of accreditation, the extensive work required to prepare for and apply for accreditation, and the lack of relevance to their work. Some felt it was designed for large land trusts and was overkill for small ones. A few of these land trusts expressed concern that their organizations may disappear once funders require accreditation of grantees.

Annual budget does not appear to influence whether or not a all-volunteer land trust plans to become accredited until the budget drops below \$25,000. Above that threshold, 41-44% of the land trusts in three budget categories plan to become accredited. Below \$25,000, only 22% of the land trusts plan to do so. Among land trusts with no annual budget or an unreported annual budget, only 5% plan to become accredited.

Staff capacity also appears to influence a land trust's accreditation plans. Land trusts with a part-time staff person are nearly twice as likely to plan for accreditation as those without staff (35% vs. 20%).

Organizational Development

According to the online survey results relating to board members and human capital for the all-volunteer land trust cohort, the majority of this group has at least six board members, but 58% have fewer than ten additional volunteers. When asked to identify all types of capacity they would like to add to their organizations, adding volunteers was the largest response followed by staff and board members. However, almost three-fourths of land trusts do not have a process for volunteer recruitment and just over half have no process for board recruitment.

Type of Capacity Desired	Percent Selected	Number Selected
Other volunteers	63%	157
Staff	50%	124
Board members	48%	120
Contractors / Consultants	20%	49
Other	15%	38
		250 responses

All-volunteer land trusts tend to focus much more on the program aspects of their work than the infrastructure and governance needed to sustain the organization. However, 72% have adopted Land Trust Standards and Practices and only 4% don't know what they are. Board priorities rated highest were land transactions, followed by compliance with laws, conservation easement stewardship, and financial oversight. Fundraising, planning, education and outreach were medium priorities, followed by volunteer recruitment and management as a low priority.

Land Conservation and Capacity

All-volunteer land trusts have protected over 477,500 acres (from 595 non-zero responses in the Alliance data set) by acquiring conservation easements / restrictions and property in fee. This is just 1% of the 47 million acres of land and 14% of the 50,100 parcels protected by fee acquisition or by conservation easements by all land trusts as of the end of the year 2010 (National Land Trust Census 2010). The majority of all-volunteer land trusts have completed five or fewer conservation easements / restrictions and five or fewer fee simple acquisitions, though the size of conservation projects varies considerably among projects and land trusts. Most organizations anticipate doing three

or fewer projects in next three years or cannot predict how many they will do. Much of this uncertainty is tied to project funding and the limited capacity of volunteer board members to devote the time and expertise needed to complete complex projects. An organization's aspirations or plans often exceed the capacity of a few volunteers, as expressed in their frustration at not being able to attract the board members and volunteers needed to achieve their mission.

When All-Volunteer Land Trusts Do Well

The most important factor in a high-functioning all-volunteer land trust is strong leadership. This includes an experienced board chair, an engaged board of directors, and dedicated members and volunteers. Another reason cited by external stakeholders for all-volunteer land trust success was that governance is a core priority instead of an afterthought. Examples of successful all-volunteer groups had leadership succession plans and younger people interested in the land trust.

Concerns About All-Volunteer Organizations

Information from interviews and focus groups with board members and part-time staff at all-volunteer land trusts revealed that their concerns are similar to those of staffed land trusts. All-volunteer land trust concerns include: funding for operations, projects, and stewardship; board recruitment and development; community engagement; accreditation; impacts of environmental change such as development, fragmentation, and climate change; and local and national political impacts on their work. A few all-volunteer land trust representatives mentioned their concern for losing income when funders require accreditation and they are not accredited. Although an issue expressed in the past was for an alternative to the accreditation process for all-volunteer land trusts, this was not a concern raised in these interviews, focus groups, or online survey.

Interviews with external stakeholders such as consultants, funders, and state association staff cited challenges for this cohort including:

- Aging board members; many founders are still in place
- Limited governance – too busy doing the conservation work of the organization to be able to devote time to governance and sustainability issues
- Funding – currently a challenge to have credibility with larger funders
- No clear path forward for the work or the organization; no priorities for what to do next.

Learning Services

Land trusts responding to the online survey were clear about which tools from the Alliance were most and least valuable to their organizations. Basic information, such as Land Trust Standards and Practices, Saving Land magazine and the Standards and Practices Curriculum, was most valuable, and information about more complex issues and advanced strategies, such as policy, legal issues, and accreditation resources were less valuable. All-volunteer land trusts are working on a tactical level in most cases and need practical, immediately useful information to support their work.

These groups rely on their board members, peer land trusts, and state associations or service centers where they exist, to provide information and assistance outside of Alliance services, and sometimes in place of Alliance products. They prefer in-person training and workshops and direct communication by email rather than social media. Many are not interested in attending national conferences, though some are unable to attend due to cost. Peer-learning groups and peer networks were often cited as preferred ways to gain knowledge and skills. This group relies upon and trusts the expertise gained through experience that they can share with each other.

Reinforcing the desire for practical support, this group cited the following when they consider future assistance:

Most Important Assistance	Least Important Assistance
Membership development and fundraising	Technical assistance on political advocacy
Grants for organizational capacity improvements	Training workshops for attorneys or appraisers
Technical assistance on land transactions and legal issues	Technical assistance on recreational development and management
Training workshops for staff, board and contractors	Technical assistance for accreditation preparation

The barriers all-volunteer land trusts identified in accessing more training and support were time, funding, and competing priorities for limited resources. The criteria used when deciding whether or not to take advantage of learning services included ease of access, cost, and the impact on the organizations.

Many land trusts mentioned that both the cost and timing of webinars was prohibitive. Even a fee of \$55 prevents groups with small budgets from participating, as their board members often cover these kinds of costs from their own pockets. With many board members working during the day, the discount of having many people participate in the webinar from one location during business hours is not accessible to them. We also heard from the land trusts and others that training or conference attendance opportunities that only one board member receives was not as effective as having a critical mass of engaged board members to make changes happen and stick.

We also heard that these groups felt overwhelmed by the extensive processes for programs like Assessing Your Organization and accreditation when considered as a whole. They desire smaller, more manageable assessment or learning modules that can be addressed over a series of board meetings. All-volunteer land trusts also struggle to navigate The Learning Center, citing that there is too much information and they cannot find what they need easily. Although 48% of land trusts in the Alliance database have accessed the Center at least once, only 6% have accessed it more than 5 times.

Program Success in the Past

Programs and services that have worked well to support all-volunteer land trusts in the past include one-to-one support provided through a trusted source, as well as small grants for specific projects, tied to a financial stake for the organization. Consultant time was cited as effective in providing an outside force for accountability. Peer support and networking was also an effective intervention with these groups as they trust those who are most like them and have shared experiences.

Less effective programs and services were noted as well. What has not worked in supporting this group are sending things through the mail, activities that require significant travel, and offering too many activities at one time. All-volunteer land trusts also need to select for themselves the programs and services they want to undertake instead of having a program for improvement imposed from the outside. This idea was expressed by stakeholders with extensive experience working with all-volunteer groups, as well as Alliance staff. While there is a need to share information about important aspects of land conservation and land trust management, providing encouragement in specific areas, the land trust board must decide for itself the areas in which it will work so that it is fully engaged in those efforts.

Analysis



As 57% of the land trusts in the country, holding over 2,600 conservation easements or restrictions, and protecting nearly half a million acres in fee or easement, all-volunteer land trusts are an important and distinct constituency for the Alliance. Many are striving to develop more capacity and greater organizational focus and impact and are most likely the organizations that are most familiar to the Alliance. Others are content to work within their communities or regions on an all-volunteer basis, but even those land trusts are facing many of the same struggles as other land trusts, and they see value in what the Alliance has to offer.

The all-volunteer segment of the Alliance's constituency is here for the long term. Sixty percent of the online survey respondents stated that limited resources were preventing them from having staff. We would expect some of those organizations to transition into staffed organizations over time, as Szabo found by comparing 1990 to 2005 Census data (Next Generation Services Strategy, Appendix A, 2009). In that study, one-third of the land trusts that appeared in both the 1990 and 2005 Censuses transitioned to staffed organizations during those 15 years. An even higher rate of transition would be expected with additional capacity-building support from the Alliance. However, with 27% of the land trusts in our online survey having made a deliberate decision not to have staff or not more than a part-time staff person and the remaining organizations that would like to have staff but cannot develop the resources to do so, it is likely that many land trusts will be all-volunteer for the foreseeable future.

All-volunteer land trusts, regardless of their business model and capacity aspirations, reflect many of the same concerns and needs seen within the land trust community. Funding for operations and projects, board development, community engagement, improving compliance with best business practices and Land Trust Standards and Practices, and preparing for accreditation or concerns about credibility and funding if they don't become accredited, are all on the minds of volunteer leaders and land trust staff.

Key differences between staffed and unstaffed land trusts that affect their ability to advance are their capacity, which affects the time it takes to adopt new practices, and their communication preferences, which are for personalized, local messages and services. The all-volunteer land trusts desire to do their work with integrity and impact;

however, the timeline is extended as the people needed to do the work are only able to complete tasks in their spare time. The expectations for the kind of work and structure needed in order to comply with best practices in land conservation are the same, but these expectations need to be altered in terms of the length of time.

Leadership was a key predictor of all-volunteer land trust success. Organizations with a strong board chair, strong executive committee, or effective part-time executive director were further along in organizational development and more likely to be strategic about their conservation work.

State associations and service centers have played an important role in providing networking and learning opportunities to AVLTs in the states where they occur. Peer networks and peer learning were found to be important mechanisms for reducing isolation and increasing knowledge and trust within the all-volunteer land trust community. Through these relationships, AVLTs stayed more up-to-date on important changes in land trust management and governance than they would otherwise be and in essence obtained some bench strength that they lacked locally.

Fully engaging the all-volunteer land trust community will reduce risks to the land trust movement and increase the Alliance's mission impact. Full engagement will give the Alliance a stronger foundation for advancing the quality, pace, and permanence of conservation with AVLTs and over time, it will increase the Alliance's membership base and financial support for its work.

Target Markets

In order to better provide services to all-volunteer land trusts it is important to understand that these organizations fall into categories, or market segments, based on the different characteristics and preferences that define their work and organizational culture. While the standards of land conservation apply to all segments, their organizational development needs vary, particularly in terms of their need for personalized guidance, their preferred communication styles, and their work process.

The development of these segments was based on the themes and trends that emerged from the answers in the online survey and interviews. In the responses to questions that focused on the future work of organizations and their ability or planning to do that work, there were clear patterns that defined the different segments.

The all-volunteer land trusts that responded to the online survey and interview opportunities fall into three market segments with two sub-categories that cross all segments. Each segment has psychographic identifiers instead of demographic ones. These groups do not break down by any traditional categories such as geography, budget size, total acres conserved, or board size.

The three target market segments for all-volunteer land trusts and their approximate representation in the responding population are:

- Overwhelmed (25%)
- Motivated (60%)
- Moving Forward (15%)

The two sub-categories within all target markets are:

- All Volunteer (14%)
- Aspire to Add Staff (86%)

Using the four P's of marketing as a framework, the **Product** (program components), **Price**, and **Place** (distribution channels) will be similar for these groups; however, **Promotion** (marketing, outreach, and engagement) will be different for each segment and sub-category.

In order to accurately determine the segment sizes overall and in each region, regional Alliance staff and state land trust association partners with working knowledge of the organizations in their area can determine the percentages of land trusts that fall within the definitions that follow. They will also be able to assign the land trusts that did not respond to outreach from this project to one of the three categories and perhaps add other categories. Alliance staff anticipate the addition of an “Inactive” category, for land trusts that hold one or no easements or properties, have declining numbers of board members and supporters, lack a budget, and are not actively pursuing additional property.

The **Overwhelmed** segment is characterized by the recognition that the organization needs more capacity but has limited strategies and plans to add resources and support. There are too many things to do and no clear path forward. Although very well-intentioned, this group is completely opportunistic in land conservation and struggles to capitalize on those opportunities. Their default response to organizational issues is that they need more time in the day to get everything done. They recognize accreditation as a

tool, but it is a very low priority on the list of things to accomplish. Communicating with this group takes persistence and personal contact. For those groups that are motivated and open to receiving services, the Alliance will need to remove barriers to services, as well as establish the explicit value of services for them.

Part of what differentiates the Overwhelmed group from the two that follow is the lack of leadership. The Motivated and Moving Forward segments typically had an impactful individual or small group of individuals who were able to see the action needed and inspire action from their board members and volunteers.

In the **Motivated** segment are those all-volunteer land trusts that can both act on opportunities and identify strategic projects for land conservation. They see accreditation as an aspiration, but are not actively pursuing accreditation yet or are doing so on a small scale over a longer time frame. This group recognizes the value in programs and services to strengthen its operations and programs, but needs barriers removed to fully engage in them. They understand the kinds of projects and activities they need to undertake, but have yet to take direct action on them. The Motivated group requires less intensive communication but will need some outside accountability and support to continue to improve.

The final segment is comprised of those land trusts that are **Moving Forward**. These groups have strategic projects they actively pursue, as well as the ability to capitalize on opportunities with operational plans for action. In many cases, they are actively working toward accreditation and embrace the value in it. Moving Forward organizations recognize the value of learning services and are eager to implement improvements. Many are participating in Advancing Conservation Excellence (ACE) or similar programs. They are clearly pursuing programs and activities that will strengthen their work and organization structure and find significant benefit in networking opportunities with peers and experts. This segment is easier to reach and more likely to seek out and engage in programs and services than the other groups. The barriers for participation are lower and once they are on the path forward, they will likely self-motivate, but they also recognize the value of some external accountability, monitoring, and mentoring.

The two sub-categories of the target markets, **All Volunteer** and **Aspire to Add Staff**, divide into the same three segments above, but are clearly distinguished by the staffing model they employ. **All Volunteer** land trusts stated that they made a deliberate decision

not to add staff and may feel strongly that this is the right approach to take. This group is as likely as *Aspire to Add Staff* to move toward accreditation and is equally active in conservation efforts. This group is interested in adding volunteers and board members to increase their capacity. As a group, this was the segment least referred by the Alliance for interviews and focus groups; only two organizations interviewed fell into this category, which seems to indicate that they are not in regular contact with Alliance staff.

The **Aspire to Add Staff** sub-category seeks to add staff capacity to the organization, along with additional board member and volunteer capacity in many cases. This group recognizes the value that staff brings to the work and structure of land trusts. They are interested in adding the skills and capacity needed to move toward a staffed model and are in varying stages of achieving that goal.

Recommendations



The recommendations developed address the needs and preferences of all-volunteer land trusts. They are based on a set of assumptions that further define all-volunteer land trusts and incorporate the research and existing knowledge of this group. The key point to keep in mind is that while all of the recommendations and implementation actions below will bolster every all-volunteer land trust, the key differentiator is the messaging needed for each market segment and sub-category.

Assumptions

The recommendations are based upon these assumptions:

- The majority of small land trusts, both all-volunteer and lightly staffed organizations, are not currently sustainable and will not be able to uphold the public trust to steward and defend easements and their owned properties in perpetuity without strategic organizational development.
- The all-volunteer land trust community is a large and important constituency of the Alliance and the Alliance desires to help these constituents become responsible and successful organizations and land stewards.
- Strategic investments in the all-volunteer land trust community will improve conservation excellence, impact, and sustainability at the local level (conserving the places people love); reduced risk to the entire land trust community with better business practices; increase Alliance membership numbers and revenue from within the all-volunteer land trust sector; and increase donor support for the Alliance's effort to reduce risk, increase organizational advancement of a large part of the land trust community, and improve the conservation impact of these small organizations.
- All land trusts want to save land and serve their communities well and many are likely to respond if the Alliance used targeted outreach that explained how it can help them achieve their goals..
- Small land trusts do valuable work and represent the local communities in which they reside to the broader land conservation community.
- Peer pressure and changes in the market and operating environments will, over time, help to bring to the table many land trusts that initially do not respond to the Alliance's outreach.
- Although merging with larger organizations or multiple small ones may seem at first glance to be one solution to many of the financial and capacity challenges of all-volunteer land trusts, most organizations are not ready to entertain those possibilities.

Based on the research, market segments and assumptions, Conservation Impact makes the following recommendations.

Recommendations

1. Create a product and service line for all-volunteer land trusts that gives them the tools, time, and guidance they need to advance their organizations (Product).

- a. The Alliance already has most of the materials and provides many of the services that will most benefit all-volunteer land trusts if delivered appropriately. Start with existing materials and services and split them into smaller modules. Develop a sequence and timing for use of the materials and services that makes sense to all-volunteer organizations and encourages board members to use them when and where they can to advance their organization's effectiveness. Work takes longer when done by volunteers and helping them understand good starting points is essential.
 - For example, provide an approach or two for all-volunteer land trusts to complete Assessing Your Organization over the course of several to many board meetings and identify how small-scale organizations should interpret standards and practices at the scale of their operations.
- b. Ensure that the language used in Alliance materials is not overly technical and that examples are relevant to small land trusts. Organizational development work needs to directly relate to the impact of the land trust's conservation work. In addressing issues of governance and internal systems, it needs to be clear to the board members that this will translate directly into improved land conservation, not merely stated as an item they must do to meet standards.
- c. Develop a path and/or section for these organizations in The Learning Center, which many organizations currently find confusing. It can link to existing materials, but should be used to provide a clear way to find materials that are specifically useful to all-volunteer land trusts.
- d. Develop an online "Land Trust in a Box" that provides succinct approaches to the basics of running, growing, maturing, and governing a land trust. Most of these materials exist, but are not co-located, provide too many examples or examples that are not relevant to an all-volunteer organization, and often don't provide practical advice on such things as record-keeping, off-site storage that is affordable and safe, basics of fundraising for all-volunteer organizations, membership development, board recruitment, etc.

- e. Develop a track for all-volunteer land trusts in the Alliance's Advancing Conservation Excellence (ACE) and similar programs that includes a readiness assessment before significant investments are made. Smaller steps, longer timelines, and frequent check-ins will be key to land trust success. Adapt and adopt programs or features that currently work for Alliance field staff and state associations who have experience with this group. Encourage the development of peer groups and opportunities for them to work together to reduce the isolation in which many land trust boards operate.
- f. Develop opportunities for all-volunteer land trust board members to learn and network with their peers at national, regional, and state conferences and through conference calls or other means between meetings.
- g. Do not create an alternative accreditation program or standards for all-volunteer organizations, but create a more achievable approach to accreditation, including through Excellence programs, that includes: smaller steps, longer preparation timelines, clarity on how the scale of a land trust's operations affects accreditation and preparation for it, and frequent check-ins.
- h. Brand all products and services so it is clear that they are part of the Alliance's comprehensive learning services program for all-volunteer land trusts.
- i. Engage an advisory committee with representatives from the all-volunteer land trust community, state land trust associations, and Alliance staff to design the line of products and services and maintain transparency of the process.

2. Eliminate cost and access barriers to using training materials and services (Price).

- a. Develop a pricing structure that offers training materials and services, such as webinars, as a benefit of membership that is free or at low cost to organizations with low annual budgets. These products and services are intended to advance organizational excellence, but they are currently not being used due to the cost barrier. They should be made available at times when people who have other jobs or live outside the Eastern Time zone can participate in live presentations. All such materials should continue to be archived and made available on demand to all member organizations. Having several board members able to participate in a live session or watch an

archived webinar when they have the time will help to increase the rate of progress of these organizations.

- b. Continue to reduce the cost of attending Rally through scholarships or other means. Providing scholarships or other support for attendance by more than one board member from each organization allows for more interaction at Rally and learning and sharing of information upon return to the organization.
- c. Provide technical assistance grants to all-volunteer land trusts to help them with capacity building, preparing for accreditation, succession planning, and other organizational development activities. Work with board members to ensure an organization is ready for a particular type of grant, sees long-term value in it for the land trust's development, and is truly committed to accomplishing the work.

3. Develop the field capacity necessary to deliver the all-volunteer land trust line of products and services (Place).

- a. Develop adequate Alliance regional staff capacity to support an intensified focus on all-volunteer land trusts. Add capacity through strategic partnerships with state associations and through contractors as needed. Enlist land trusts with adequate capacity and experience as mentors and trainers.
- b. Partner with state associations and service centers to deliver the all-volunteer programs. These organizations are a trusted local partner of land trusts, with similar mission and interests to the Alliance, and who work closely with the Alliance's major constituents daily. In states with no local associations, work directly to support these land trusts.
- c. Support development of nascent state associations to grow partners where there are none.
- d. Oversee collaborative programs with the state associations to ensure alignment with Alliance standards and goals.
- e. Incentivize less-risky collaborations that meet immediate needs and help build trusting relationships among land trusts as a first step to solving some capacity issues. Then encourage increased collaboration among land trusts leading to shared resources, collaborative protection and/or stewardship projects, and potentially to strategic alliances and mergers.

- f. Raise funds from a variety of sources to support regional implementation of the programs and services.

4. Develop and implement a marketing and communication plan to engage all-volunteer land trust audiences to advance organizational excellence and sustainability through the learning services offered by the Alliance and its partners (Promotion).

The recommendations above will impact all target markets of all-volunteer land trusts. In this recommendation, we separate the segments based on their communication preferences.

- a. Develop messages for all-volunteer land trust market segments and sub-categories that acknowledge a shared passion for conserving places people love, speak to each segment's concerns and realities, and address the practical / tactical aspects of their land conservation work.
 - Messages for the All Volunteer sub-category should acknowledge their unique role and identity as unstaffed organizations. This group believes that being all-volunteer is best for the organization and community and may take offense at a presumption that they should have staff. Offer the support they need as a member of one of the major market segments.
 - Messages for the Aspire to Add Staff sub-category should acknowledge the desire to build staff capacity and encourage and guide the land trusts to achieve this goal.
 - For Overwhelmed, the message needs to be in clear language, offering one or two ideas, and providing a simple path forward to advance one aspect of the organization at a time.
 - Motivated organizations need encouragement and a personal touch, clear steps forward, and right-sized opportunities to follow those steps.
 - Moving Forward should be congratulated and offered services to augment their successful efforts to date.
- b. Conduct additional research and outreach utilizing state associations and Alliance regional staff to learn more about the non-responders to this project

to determine their market category, appropriate outreach tools, and level of risk to the larger land trust community.

- c. Develop a communication plan with clear messages and recognition that the best messenger for each target market may be different. This group needs to hear that you are genuinely interested in them. Make a sincere effort at individual or small group interactions, hearing what they need, customizing that work, and then moving toward less intensive resources.
- d. Media: Email and the internet work for all segments except Overwhelmed. For all groups, more personalized communication is received well.

Conclusion



All-volunteer land trusts are a major constituency for the Alliance, one that will be with the organization for many years. Many of these land trusts desire adequate capacity to have an ongoing impact in their communities. Most have not deliberately decided to be understaffed, but rather do not have adequate resources to hire staff. Many also do not have adequate capacity to develop their organizational infrastructure and governance within the context of Land Trust Standards and Practices and therefore pose a risk to the public policy benefits shared by all land trusts.

The Alliance has many of the materials and service models it needs to assist these organizations in improving their conservation and business practices and developing collaborations for greater impact and sustainability. To reach the all-volunteer land trust target markets, the Alliance must deliver those materials and services in appropriately sized segments, over longer periods of time, with lowered cost barriers, and with more personal interaction and tailored communications than it currently employs.

Personal communication and delivery of products and services, in particular, will require significant new investments. However, the return on those investments will include less risk to the conservation community, more sustainable conservation at the local level, and ultimately, land trusts that are able to develop the strategic alliances that will be necessary to sustain their conservation efforts in perpetuity.

Early opportunities to reach the all-volunteer land trust community include convening an advisory committee to gain input and ensure transparency, tailoring communications to reflect the realities faced by the all-volunteer land trusts, modifying existing learning service materials or creating guides to those materials that the land trusts' volunteers can easily use, and establishing a section or path in The Learning Center for them, including aggregated materials, such as the Land Trust in a Box concept. The Alliance can also immediately begin to reach out to these land trusts. In doing so, it will gain knowledge of the many land trusts that did not respond to the online survey and develop deeper knowledge and trust with the entire community. By developing a strong foundation of trust and understanding, the Alliance will have a greater opportunity to help all-volunteer land trusts advance their organizational development, increase their conservation impact, and reduce the risk to the entire land trust community.

Appendix I. Survey Data Analysis

This appendix includes more in-depth information and descriptions that support the findings and recommendations in the main document. Conservation Impact will also provide to the Alliance summary documents from the online survey, as well as transcripts from the interviews and focus groups, all of which will have the identifying information removed.

Geography and Outreach

These tables supply the detail of responses to the online survey and the individual interviews and focus groups.

Online Survey	Number Sent	Number Returned	% Response Rate
Survey to MLTC cohort	117	67	57%
Survey to national cohort	747	191	26%
Combined surveys	864	258	30%

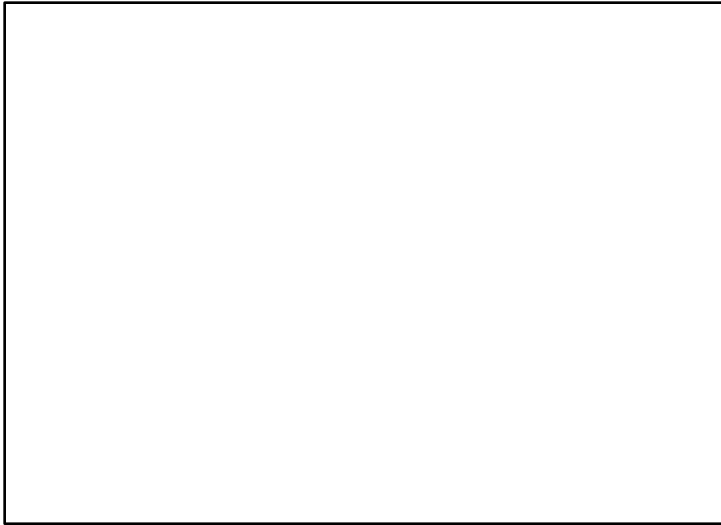
Land Trust Outreach	Number of Online Surveys	Individual Interviews	Focus Group Participants
Northeast	171	4	17
Southeast	16	5	1
Midwest	44	5	4
West	27	2	4
	258	16	26

Alliance regional cohorts:

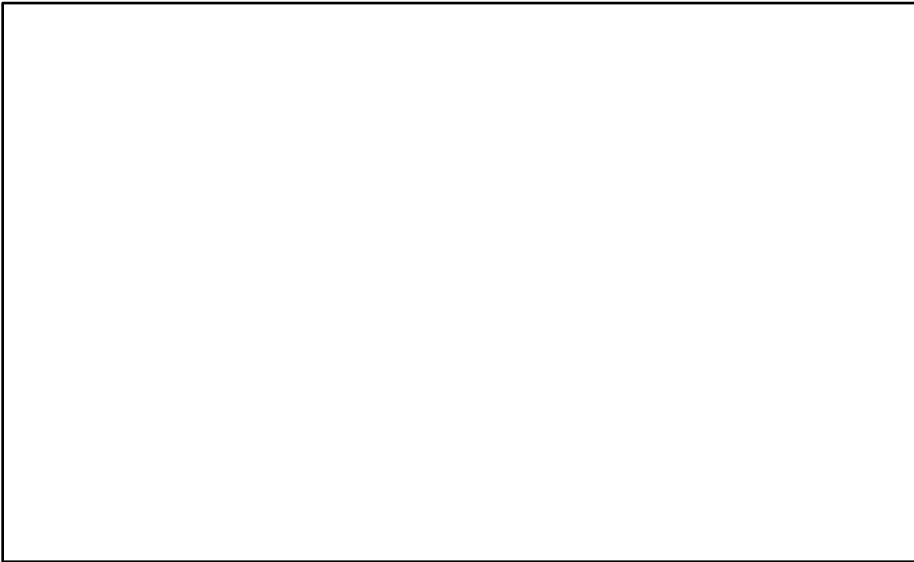
- Northeast: CT, DC, DE, MA, ME, MD, NH, NJ, NY, PA, RI, VT (12)
- West: AK, AZ, CA, CO, HI, ID, MT, NV, NM, OR, TX, UT, WA, WY (14)
- Midwest: IA, IL, IN, KS, OH, OK, MI, MN, MO, ND, NE, SD, WI (13)
- Southeast: AL, AR, FL, GA, KY, LA, MS, NC, SC, TN, VA, WV (12)

Accreditation

The following graphs represent information gathered through the online survey tool.



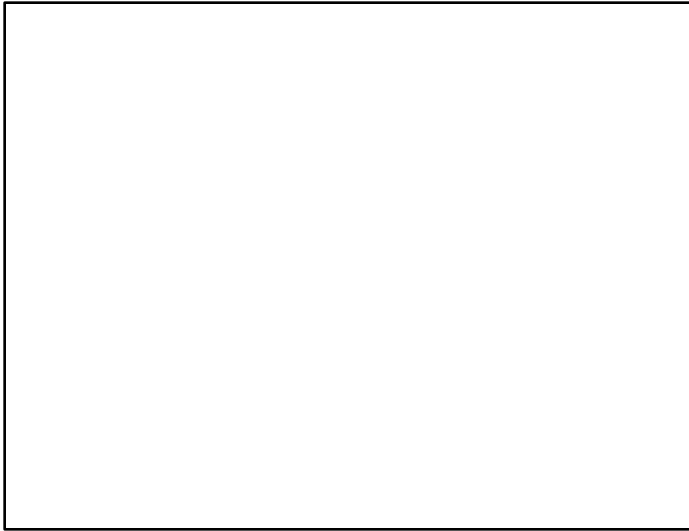
Question: If your organization plans to pursue accreditation, when do you think you might apply?



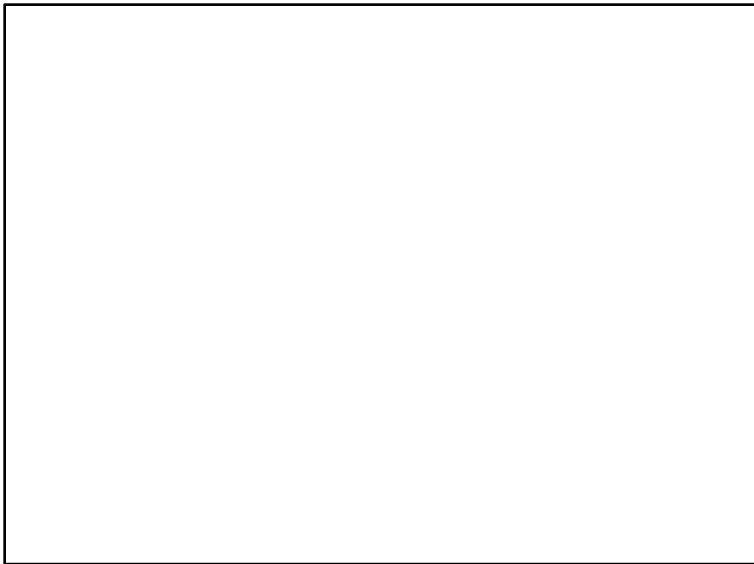
Question: If you have a budget, what is your most recent operating budget?

Organizational Development

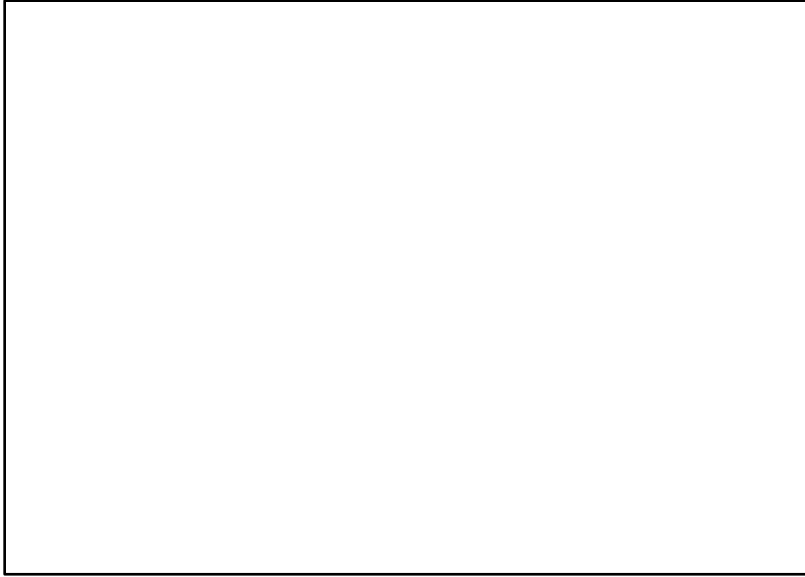
The following graphs represent information gathered through the online survey tool.



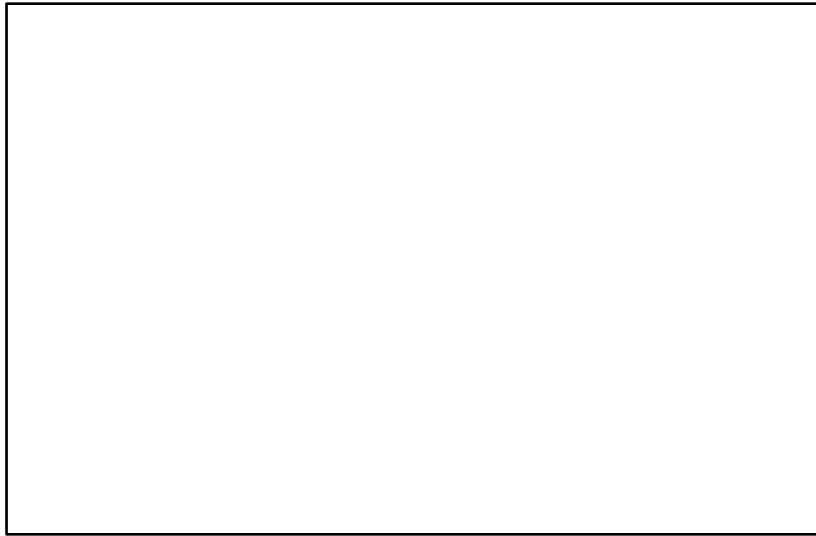
Question: Does your organization actively employ a process for board member recruitment?



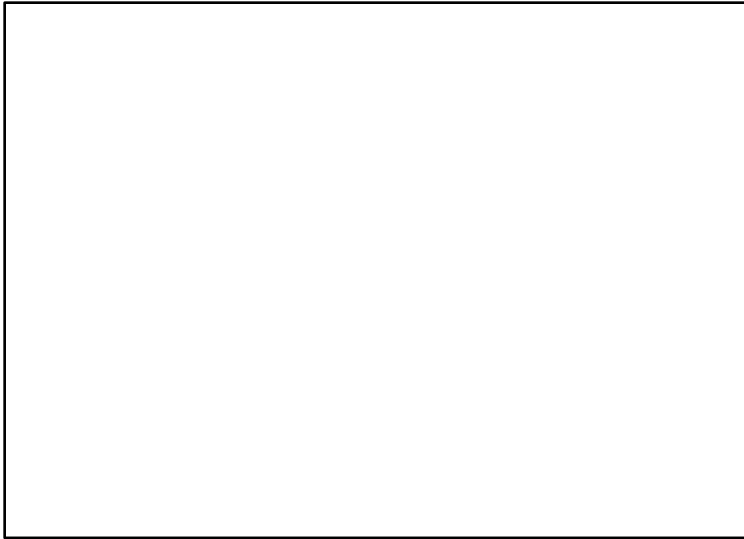
Question: Does your organization actively employ a process for volunteer (non-board member) recruitment?



Question: Number of board members on April 1, 2012.



Question: Number of active volunteers other than board members in 2011.



Question: Has your organization adopted Land Trust Standards and Practices?

Learning Services

Data presented here are from the online survey.

Ranking of Services Provided by the Alliance

Most Valuable Service	Least Valuable Service
Land Trust Standards and Practices	Legal clearinghouse
Public website	Land Trust accreditation commission
Saving Land magazine	Pathways to Accreditation
Publications, including Standards and Practices Curriculum	Alliance public policy staff

Most likely place outside of the Land Trust Alliance to get information and assistance

- Board member expertise
- Other land trusts
- Community members
- Local consultants

When asked about preferred learning and communication styles, the responses were as follows:

Most Preferred Communication	Least Preferred Communication
In-person trainings and workshops	Social media
Email	National conferences
State meetings	
Technical assistance	

Appendix II. Interview, Focus Group, and Survey Questions

Questions for Non-Land Trust Interviews (state associations, funders, opinion leaders, consultants)

Interviewer: introduce project, what is meant by all-volunteer land trust, and anonymity.

- Please introduce yourself and tell me how have you worked with the Land Trust Alliance and/or all-volunteer land trusts?
- What do you see as the key issues for all-volunteer land trusts and their biggest needs?
- What obstacles or concerns have you experienced in working with all-volunteer land trusts?
- What do you see as the barriers for all-volunteer land trusts in accessing and implementing technical support and training?
- What other organizations are providing services for these land trusts?
- Do you have an example of a all-volunteer land trust doing good work? What makes them successful? Is the situation sustainable?
- What is your advice or recommendation for the Land Trust Alliance in serving all-volunteer land trusts?
- What is your advice or recommendation for all-volunteer land trusts seeking to be successful at accomplishing their mission?
- What else is important for me to know or think about the work / relationships / future of all-volunteer land trusts?

Questions for All-Volunteer Land Trusts – Individual and Focus Groups

Interviewer: introduce project, what is meant by all-volunteer land trust, and anonymity.

- Please introduce yourself and your land trust, including your staffing or contract staff situation and number of board members.
- In one sentence, how do you define success for your land trust? How would you rate your success on a scale of 1 – 10 (low to high)?
- What would you like to do as a land trust that you currently aren't able to do? What do you need in order to do it?
- What keeps you up at night as a land trust board member (or part-time staff person)?
- How do you see the work of your land trust changing over the next five years? How will that affect the resources, capacity, partnerships, and skills that you need?
- We heard from our survey that a majority of all-volunteer land trusts do not have staff because resources are limited. If your land trust is in this situation, why are your resources limited? What is needed to remedy the situation?
- Preliminary research showed that many land trusts would like to add volunteers and new board members, but most reported that they do not have a structure or process in place to do so. Please help me understand this.
- About 50% of all-volunteer land trusts reported that they are already accredited, or likely or very likely to apply for accreditation. Only 9% reported definitively that they will not become accredited. What do you see as the benefits and challenges of accreditation to your land trust and to the land trust community? If your land trust is considering accreditation, what would be most helpful to you to achieve that goal?
- How do you prefer to access services and support for your organization?
- What could the Land Trust Alliance do that would be of value to you and your land trust?

Online Survey Questions for Land Trust Alliance Regional Staff

- What programs or services have you found to work in the past to support and strengthen all-volunteer land trusts?
- What has not worked in supporting them?
- Which all-volunteer land trusts in your service area are doing a great job at achieving their mission and why do you think they are successful?
- What are the biggest issues / needs you see for all-volunteer land trusts?
- What are barriers to advancement for all-volunteer land trusts?

Online Survey Questions for Land Trusts

This survey includes both the question set that was sent to all land trusts and the six-question set that was sent to Massachusetts Land Trust Coalition member land trusts.

1. Survey Overview

Thank you for participating in this survey of Volunteer-Led Land Trusts, which is being administered by Conservation Impact. We are conducting an extensive outreach and evaluation effort, including this survey, to help the Land Trust Alliance (the Alliance) better understand your various training and service needs and the challenges you face in obtaining training and information. A key outcome of this project will be an action plan for the Alliance to provide improved services and communications to volunteer-led land trusts. Conservation Impact will keep all responses anonymous and confidential.

Please complete the survey by Friday, May 11, 2012.

The Alliance can only provide the services that it knows you need to support the work of your land trust. The Alliance is genuinely interested in your honest feedback. We appreciate that you have many demands on your time and thank you in advance for participating in this survey.

This survey will take approximately 25 minutes. If you need to exit the survey before it is complete, please click on the Exit the Survey button at the top of the page. You can then resume your survey from the same computer at a later time.

Please contact Cindy Willard at Conservation Impact if you have any questions (cindy@conservationimpact.com; 303-223-4886).

2. General Information

This section covers basic contact and organizational details about your land trust.

* 1. Organization name

* 2. Geographic location

City/Town:

State:

ZIP:

3. Year of incorporation

* 4. Name of person completing the survey

* 5. Email address of person completing the survey

6. Name of organization's main contact if different from above

7. Main contact's email address if different from above

8. Organization's website

9. Do you have an operating budget?

☐

Yes

☐

No

10. If so, what is your most recent annual operating budget?

11. From which sources does your organization receive income?

Please check all that apply

- ☐ Members
- ☐ Individual donors
- ☐ Board member contributions
- ☐ Community foundations
- ☐ Private foundations
- ☐ National foundations
- ☐ Earned income/fee for service
- ☐ Local government
- ☐ Project grants
- ☐ Nonprofit organizations
- ☐ Other

Other (please specify)

3. Organizational Capacity

We are interested in your land trust's internal capacity to accomplish its work.

For number of employees and staff, please count each person and then indicate what percentage of a full-time equivalent (FTE) they represent:

1. Number of employees on April 1, 2012 (can be 0)

2. Number of full-time equivalents (FTEs) represented by those employees

☐ 0.0

☐ .25

☐ .5

☐ .75

☐ 1.0

3. Number of contractors/consultants on April 1, 2012 (can be 0)

4. Number of full-time equivalents (FTEs) represented by those contractors/consultants

☐ 0.0

☐ .25

☐ .5

☐ .75

☐ 1.0

5. If I could add capacity to my organization, it would be in the form of:

(Check all that apply)

☐ Staff

☐ Contractors/consultants

☐ Board members

☐ Other volunteers

Other (please specify)

6. Number of board members on April 1, 2012

7. Number of active volunteers other than board members in 2011

8. Number of financial supporters who contributed to your organization in 2011

9. Does your organization actively employ a process for volunteer (non-board member) recruitment:

☐ Yes

☐ No

10. If so, does your land trust provide volunteer:

	Yes	No
Orientation	☐	☐
Training	☐	☐
Evaluation	☐	☐

11. Our organization is volunteer-led because (select one that best describes your situation)

- ☐ We made a deliberate decision that we do not need any staff to accomplish our mission
- ☐ We made a deliberate decision that we do not need more than a part-time staff person to accomplish our mission
- ☐ We made a deliberate decision not to use our operating budget or funds raised to pay for staff
- ☐ Resources are limited and we do not have enough money to hire staff
- ☐ We want to have staff, but cannot find the right staff for our organization
- ☐ Other

If you selected other, please explain

4. Governance

The governance section covers your board of directors and governance roles.

1. Does your land trust have term limits for its board members?

☐ Yes

☐ No

2. Does your organization have active board committees, such as executive, finance, or land protection committees?

☐ Yes

☐ No

3. Approximately what percentage of board members actively participates in the organization's work outside of board meetings?

☐ 100%

☐ 75%

☐ 50%

☐ 25%

☐ 0%

4. Does your organization actively employ a process for board member recruitment?

☐ Yes

☐ No

5. If so, does your organization provide board member:

	Yes	No
Orientation	☐	☐
Training	☐	☐
Evaluation	☐	☐

6. Please rate your board's priorities.

	High	Medium	Low	N/A
Planning	☐	☐	☐	☐
Fundraising	☐	☐	☐	☐
Financial oversight	☐	☐	☐	☐
Compliance with local, state and federal laws	☐	☐	☐	☐
Land transactions	☐	☐	☐	☐
Conservation easement stewardship	☐	☐	☐	☐
Fee land stewardship	☐	☐	☐	☐
Outreach	☐	☐	☐	☐
Education	☐	☐	☐	☐
Staff / contractor management	☐	☐	☐	☐
Volunteer recruitment and management	☐	☐	☐	☐
Other	☐	☐	☐	☐

Other (please specify)

7. Has your organization adopted "Land Trust Standards and Practices"?

- ☐ Yes
- ☐ No
- ☐ Don't know what this is

Why or Why not?

8. Not all land trusts will pursue accreditation. How likely is it that your land trust will pursue accreditation?

- ☐ We are already accredited
- ☐ Very Likely
- ☐ Somewhat likely
- ☐ Unlikely
- ☐ Will not pursue
- ☐ Unsure

9. If your organization plans to pursue accreditation, when do you think you might apply?

- ☐ 2012
- ☐ 2013
- ☐ 2014
- ☐ 2015
- ☐ 2016
- ☐ 2017+

10. My organization is not planning to pursue accreditation because...

5. Conservation

Please tell us about your accomplishments.

1. How would you describe your organization's progress in meeting its mission within your service area in these aspects of conservation?

	We have met our mission	We are making progress in meeting our mission	We have not made strong progress in meeting our mission	We don't have a clearly defined mission	Not part of our mission
Land protection	☐	☐	☐	☐	☐
Annual monitoring	☐	☐	☐	☐	☐
Land management or stewardship	☐	☐	☐	☐	☐
Habitat restoration	☐	☐	☐	☐	☐

2. If you have not accomplished all of your organization's land conservation priorities, what would help you do more?

3. Does your land trust engage in activities outside of land conservation?

- ☐ Yes
- ☐ No

4. If so, what are those activities? Please check all that apply.

- ☐ Education
- ☐ Nature center
- ☐ Public land management (trails, open space, parks, arboretum, etc.)
- ☐ Local planning
- ☐ Habitat restoration
- ☐ Community gardens
- ☐ Local food production
- ☐ Other

Other (please specify)

5. Which of the following entities does your organization collaborate with to accomplish its conservation goals (check all that apply):

- ☐ Local government
- ☐ State government
- ☐ Federal government
- ☐ State and local land trusts
- ☐ Local or regional land trust service center
- ☐ Other local nonprofits
- ☐ National conservation organizations (e.g., The Nature Conservancy)
- ☐ Watershed protection organizations
- ☐ We do not collaborate with others in our work
- ☐ Other

Other (please specify)

6. For lands your organization has conserved in fee (outright ownership):

Total number of properties

Total number of acres

Projected number of projects that your organization will conserve in fee over the next three years

7. For conservation easements/restrictions held by your organization:

Total number of conservation easements/restrictions

Total number of acres

Projected number of projects that your organization will conserve in easements/restrictions over the next three years

8. Total number of acres conserved by your organization, including conservation easements/restrictions, fee lands, and land transferred to other organizations or agencies:

In calendar year 2011

Since your organization's inception

6. Learning Services

Your land trust may choose to access continuing educational and assistance services. We are interested in learning more about where and how you like to learn.

1. Does your organization know what learning services the Land Trust Alliance offers for your organization?

- ☐ Yes, we know of all the services offered
- ☐ We know of some of the services offered
- ☐ No, we do not know of the services offered

2. Of the following tools and services, which ones does your organization use, and how valuable are they?

	Extremely valuable	Somewhat valuable	Not valuable	Don't use
Land Trust Standards and Practices	☐	☐	☐	☐
Publications, including the Standards and Practices Curriculum	☐	☐	☐	☐
Saving Land magazine	☐	☐	☐	☐
Standards and Practices assessment (Assessing Your Organization)	☐	☐	☐	☐
Land Trust Accreditation Commission	☐	☐	☐	☐
The Learning Center	☐	☐	☐	☐
Pathways to Accreditation	☐	☐	☐	☐
Webinars	☐	☐	☐	☐
Advocates Alerts	☐	☐	☐	☐
Alliance Public Policy Staff	☐	☐	☐	☐
Conserve A Nation insurance program	☐	☐	☐	☐
Legal Clearinghouse	☐	☐	☐	☐
Regional trainings and conferences	☐	☐	☐	☐
Rally	☐	☐	☐	☐
Alliance regional program staff coaching, consultation and training	☐	☐	☐	☐
Land Trust Alliance public website	☐	☐	☐	☐
Land Trust Alliance information services (help line)	☐	☐	☐	☐
Listserv emails	☐	☐	☐	☐

3. Where else does your land trust get information and assistance? Check all that apply.

- ☐ Statewide nonprofit associations
- ☐ Statewide land trust associations or service centers
- ☐ Other land trusts
- ☐ Foundation nonprofit support centers
- ☐ Other community resources (Chamber of Commerce, service organizations, etc.)
- ☐ Board member expertise
- ☐ Community members
- ☐ Local consultants
- ☐ National consultants
- ☐ Other

Other (please specify)

4. What are your preferred communication or delivery methods for learning services?

	Most Preferred	Acceptable	Least Preferred
Online training, such as webinars	☐	☐	☐
In-person training or workshops	☐	☐	☐
Consulting (organizational development, strategic planning)	☐	☐	☐
Technical assistance (updating conflict of interest policy, database development, assistance with transactions or stewardship)	☐	☐	☐
National conferences	☐	☐	☐
Regional meetings/conferences	☐	☐	☐
State meetings/conferences	☐	☐	☐
Circuit rider services	☐	☐	☐
House call service delivery (resource comes to your board meeting)	☐	☐	☐
Online training - unscheduled, self-paced	☐	☐	☐
Email messages	☐	☐	☐
Printed materials	☐	☐	☐
Social media	☐	☐	☐

Other (please specify)

5. Please indicate which of the following your land trust has undertaken in the last three years. Check all that apply.

- ☐ Developed a stewardship plan
- ☐ Developed a membership communication plan
- ☐ Board training
- ☐ Formally adopted a written strategic plan
- ☐ Developed a land protection plan or strategic conservation plan to identify a geographic area or resource to target your efforts
- ☐ Formally adopted a written fundraising plan
- ☐ Developed a community outreach and awareness-building plan
- ☐ Developed a landowner outreach and education program for a project area
- ☐ Developed a board development plan (board recruitment, orientation, responsibilities)
- ☐ Evaluation of the board of directors
- ☐ Established or updated policies for financial and asset management
- ☐ Established policies and procedures for land and/or conservation easement acquisition
- ☐ Established policies and procedures for management of land owned in fee
- ☐ Established policies and procedures for conservation easement monitoring and defense
- ☐ Preparation for accreditation
- ☐ Standards and Practices assessment (AYO) or other organizational assessment

6. From the list below, please indicate three types of assistance that will be most important to your organization in the next year and three types of assistance that will be least important in the next year.

PLEASE CHECK UP TO 3 IN EACH COLUMN

	Most important	Least important
Training workshops for staff, board, or contractors	☐	☐
Training workshops for attorneys or appraisers	☐	☐
Technical assistance on land transactions or legal issues	☐	☐
Technical assistance on land management, stewardship, or monitoring	☐	☐
Technical assistance on strategic conservation planning	☐	☐
Technical assistance on recreational development and management	☐	☐
Technical assistance on nonprofit organizational development or strategic planning	☐	☐
Technical assistance on political advocacy	☐	☐
Technical assistance on marketing and communications	☐	☐
Building relationships with statewide agencies or funders	☐	☐
Financial assistance to attend national, regional, or state conferences	☐	☐
Standards and Practices assessments	☐	☐
Mentoring/peer learning from another land trust	☐	☐
Database development and management support	☐	☐
Membership development and fundraising	☐	☐
Technical assistance for accreditation preparation	☐	☐
Grants for organizational capacity improvements	☐	☐
Grants for accreditation preparation	☐	☐
Policies and procedures information/examples/templates	☐	☐
Other	☐	☐

Other (please specify)

7. What keeps your land trust from accessing more training or support services? Please check all that apply.

- ☐ Time
- ☐ Interest
- ☐ Funding/Cost
- ☐ Relevant training options not available
- ☐ Delivery method of training (ie: webinar, conference, in-person training)
- ☐ Competing priorities for limited resources
- ☐ Travel time
- ☐ Lack of awareness of opportunities
- ☐ Other

Other (please specify)

8. What is most important for your organization when deciding whether or not to take advantage of learning services? Please check all that apply.

- ☐ Ease of access
- ☐ Impact on the organization
- ☐ Cost
- ☐ Frequency of offerings
- ☐ Source/who delivers it
- ☐ Other

Other (please specify)

9. Please complete the following statements:

The most useful
service(s) our
land trust needs
at this time is

The most
important
accomplishment
our land trust
could achieve
at this time is

In order to
accomplish this,
we need to . . .

10. Other thoughts or comments that you would like to share?



7. MLTC specific questions

1. Are you currently a member of the Massachusetts Land Trust Coalition?

☐ Yes

☐ No

2. If not, do you use any of MLTC's free services such as the e-newsletter, list serves, regional trainings?

☐ Yes

☐ No

3. Of the following current MLTC services, how many do you use and how useful are they?

	Very useful	Somewhat useful	Occasionally Useful	Not Useful	Don't Use
E-newsletter	☐	☐	☐	☐	☐
Land Protection List Serve	☐	☐	☐	☐	☐
Stewardship List Serve	☐	☐	☐	☐	☐
Action Alerts	☐	☐	☐	☐	☐
Annual Mass Land Conservation Conference	☐	☐	☐	☐	☐
Quarterly Steering Committee Meetings	☐	☐	☐	☐	☐
Land Trust/State Agency Retreat	☐	☐	☐	☐	☐
Regional Trainings on Current Issues (e.g. Avoiding Tax Exemption Problems)	☐	☐	☐	☐	☐
Massland.org online resources (Land Conservation Practitioners Info, Land Trust Operations Info, etc)	☐	☐	☐	☐	☐

4. What could MLTC offer in the future that would be most useful to your organization?

5. For small groups workshops, what timing would you most prefer?

	Most preferred	Acceptable	Least preferred
Weekend	☐	☐	☐
Mid week	☐	☐	☐
Daytime	☐	☐	☐
Evening	☐	☐	☐

6. Please answer the following about your experience or interest in webinars:

	Yes	No
I have used webinars previously	☐	☐
I have access to computer service sufficient to support webinar viewing	☐	☐
I would be willing to join a group of peers at a convenient location to view and discuss a webinar.	☐	☐

8.

Thank you for your time and interest in completing this survey.

Conservation Impact provides comprehensive organizational development consulting to nonprofits and related public agencies dedicated to environmental quality and natural resource protection. Founded in 1996, Conservation Impact has worked on more than 880 projects with nearly 600 organizations nationwide and internationally.

The company specializes in strategic planning and positioning, marketing, and organization analysis and development. We use an Integrated Strategy approach that looks at organizational identity, capacity, and constituents. We help our clients go to their next level of development.

The Conservation Impact staff bring significant expertise in nonprofit management, marketing, and conservation planning with degrees in biology, ecology, environmental conservation, nonprofit management, and public administration.

Conservation Impact's sister company, Nonprofit Impact, provides consultation and training to organizations and agencies dedicated to community and public health, education, and human services.

For more information about the companies, our team, or our work, please call us at 303.223.4886 or visit us online at www.conservationimpact.com

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