

**Land Trust Training and Technical Assistance Programs:
A National Assessment**

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**An Applied Research Project
Political Science 5397
Submitted to the Department of Political Science
Texas State University – San Marcos
In Partial Fulfillment of the Requirements for the Degree of
Masters of Public Administration
Fall 2005**

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Abstract

Land conservation is no longer just a grassroots effort, but a genuine national concern. Over nine million acres of significant natural areas are currently protected by more than 1,500 nonprofit land trusts. The land trust community is growing at a record speed and organizational capacity building is a necessity. National *Standards and Practices* and a voluntary accreditation program are in place, but there is uncertainty regarding how professional training and technical assistance will be delivered to land trusts throughout the country. Today's assortment of service centers provides a range of services in select areas, but the scope and consistency of training and assistance varies significantly. The purpose of this research is three fold: (1) Establish a working model that identifies the components necessary to build and maintain a strong land trust training and technical assistance program; (2) Use the working model to assess service centers around the country; and (3) Using assessment results, provide recommendations to enhance land trust training and technical assistance services throughout the country.

The working model is composed of two major categories with several smaller components: (1) Organizational Structure; *Governance, Mission, Strategic Planning, Financial Resources, Staff Support, Continuing Education* and (2) Land Trust Services; *Training, Technical Assistance, Collaboration/Networking, and General Consultation*. The population includes 22 organizations that provide structured training and technical assistance to land trusts on a regular basis. Multiple data collection techniques include a survey, document analysis and web site analysis to provide a variety of perspectives.

Results indicate that organizations meet five of the 18 Organizational Structure elements, and nine of the 14 Land Trust Services elements. Conclusions of the study include a proposed definition for service centers, suggestions for improvement, and examples of best practices.

Chapter 1. Introduction

Approximately 25 years ago Congress enacted the current law governing tax deductions for donations of conservation easements¹. Since then, the number of land trusts has grown to more than 1,500, and more than 9 million acres of natural areas have been protected (Land Trust Census 2003). With the growth of land trusts, national (Land Trust Alliance) and local organizations (service centers) have developed to assist land trusts with capacity building, public policy and collaborative efforts. Given the success of the land trust movement, few imagined that Rand Wentworth, president of the Land Trust Alliance (LTA), would have to testify in front of the Senate Finance Committee to defend the future of private land conservation². In the shadow of the Enron scandal and the Sarbanes Oxley Act³, the rapidly growing land trust movement is now also facing the test of public awareness and concern, and is working hard to demonstrate its growing professionalism and credibility.

Public scrutiny is increasing as Congress, donors, the media and the public are more aware of the land trust community, including its successes, failures, strengths, and weaknesses (LTA March 2005, 2). Over the past two decades, the Land Trust Alliance has developed the framework for building public credibility by establishing national *Standards and Practices* and

¹ I. R. C. §170(h) – “qualified conservation contribution”.

² The Senate Finance Committee hearing was held on June 8, 2005. More information can be found at lta.org.

³ “The American Competitiveness and Corporate Accountability Act of 2002, commonly known as the Sarbanes-Oxley Act, was signed into law on July 30, 2002. Passed in response to the corporate and accounting scandals of Enron, Arthur Andersen, and others of 2001 and 2002, the law’s purpose is to rebuild public trust in America’s corporate sector. The law requires that publicly traded companies adhere to significant new governance standards that broaden board members’ roles in overseeing financial transactions and auditing procedures. While nearly all of the provisions of the bill apply only to publicly traded corporations, the passage of this bill should serve as a wake-up call to the entire nonprofit community. If nonprofit leaders do not ensure effective governance of their organizations, the government may step forward and also regulate nonprofit governance. Indeed, some state attorneys general are already proposing that elements of the Sarbanes-Oxley Act be applied to nonprofit organizations” (www.boardsource.org).

most recently creating an accreditation program⁴. In fact, the Senate Finance Committee held up the *Land Trust Standards and Practices* book at a hearing and recommended that it be an example for other nonprofits to follow. These existing *Standards and Practices* have become the foundation for building land trust capacity and the voluntary accreditation program.

In order for land trusts to continue to enhance their performance with *Standards and Practices* and accreditation expectations, the LTA Program Design Steering Committee⁵ identifies training and technical assistance as a necessary component (LTA March 2005). LTA is therefore developing a curriculum focused on the implementation of *Standards and Practices* (in preparation for accreditation), and plans to partner with land trust service providers and other consultants to deliver the training (LTA October 2005). The dilemma is that it is not clear who these service providers are, what their capacity is to continue providing services, and how LTA will partner with them. “Technical assistance for land trusts is wide and varied and offered by many organizations and individuals” (LTA March 2005). In order to provide a base for establishing a larger and more unified network of service-providing organizations in the future, this study identifies and examines the array of organizations currently providing services to land trusts.

The following chapter provides more detailed information regarding the need for training and technical assistance in the land trust community, the diversity of organizations trying to meet this need, and how the purpose of this study contributes to the national effort to protect the future

⁴ The National *Standards and Practices* were revised in 2004. The accreditation commission is being established. The procedures for accreditation will be finalized in 2006, procedures will be tested by an initial round of applicants in 2007, and full operation will begin in 2008.

⁵ “In October 2004, LTA convened the 19-member Standards and Practices Program Design Steering Committee to clarify the threats to land conservation and explore credentialing options. To ensure diversity of perspective, the committee members were recruited from a broad cross-section of land trusts representing all sizes, types, and geographic locations” (LTA March 2005, 2).

of land conservation. The latter end of the chapter provides a brief summary of each chapter that will follow this introduction.

Land Trust Movement

Literature suggests that the nonprofit community as a whole has entered into a period of increased visibility, and as a result is becoming more professionalized (Salamon 1999, 164).

Land trusts are one member of the nonprofit community, defined as “a nonprofit organization that, as all or part of its mission, actively works to conserve land by undertaking or assisting in land or conservation easement acquisition, or by its stewardship of such land or easements”

(LTA 2003).⁶ The land trust community is a prime example of how the visibility of the nonprofit community has increased. Land trusts have grown at a record pace over the past ten years, increasing public awareness and support in addition to heavy scrutiny over the past three years. The land trust community has taken significant actions to build professionalism and credibility of their organizations to promote capacity building and address the public concerns.

Throughout 2003 and 2004, the *Washington Post* released a series of articles attacking the land trust community, particularly The Nature Conservancy, and conservation easements. After 25 years of the conservation easement tax law being in place, it is understandable that the law needs to be reviewed and reformed to catch up with the modern world⁷. However, the way in which the reforms were brought to the attention of Congress was unexpected. The articles reported on events such as oil drilling on conservation properties, appraisals being overvalued by 220 percent, and questionable land transactions with insiders of land trust organizations (Stephens and Ottoway 2003 and 2004). This media scrutiny of unethical conservation practices highlighted only a few abuses but caused government regulators, donors, and the public to

⁶ More details about land trust organizations are provided in Chapter 2.

⁷ Russ Shay, LTA’s Director of Policy makes this point in many of his presentations.

question the land trust community as a whole (LTA March 2005, 2). Most notably, the articles got the attention of the Senate Finance Committee and the IRS.

The Senate Finance Committee launched an investigation of The Nature Conservancy, and the IRS released Notice 2004-41 and began audits for more than 250 conservation easement donors (Miller 2005)⁸. To make matters even more complicated, the Joint Committee on Taxation (JCT)⁹ drafted reform legislation in January 2005, at the request of the Senate Finance Committee. The JCT recommendation disallowed personal residences on conservation properties, among other reforms, nearly eliminating conservation easements as a tool for private land conservation¹⁰. As Rand Wentworth stated, it was “a gun pointed right at the deductibility of conservation donations”.¹¹ The JCT report made it clear that the land trust community faced a serious threat of losing significant tax incentives for conservation donations. The land trust community did not hesitate and rose to protect itself against this assault on conservation.

The Land Trust Alliance took a very proactive approach to the situation. LTA first developed a working dialogue with the Senate Finance Committee and other Congressional members to increase the knowledge and appreciation for conservation easements throughout Capitol Hill. LTA supported reforms that would ensure sound transactions, but spoke out against reforms that could cripple the entire system for donation of conservation lands. The working dialogue with Congressional leaders and the IRS continues to allow LTA to be involved with the draft reform legislation and the revisions of IRS forms intended to support ethical and legal transactions that are reasonable for land trust compliance¹².

⁸ TNC Report can be found at <http://finance.senate.gov/sitepages/TNC%20Report.htm>. Notice 2004-41 warned the conservation community of increased scrutiny of conservation transactions and can be found at www.irs.gov.

⁹ The Joint Committee on Taxation is a think tank for Congress regarding tax issues.

¹⁰ The JCT Report can be found at <http://www.house.gov/jct/s-2-05.pdf>

¹¹ This statement was made in a report about the JCT recommendations that Rand Wentworth sent out to the land trust community.

¹² For example, IRS forms 990 and 8283 are currently being revised.

LTA also researched and launched a voluntary accreditation program to build the credibility of land trust organizations in the public eye. A credentialing program has been an ongoing discussion for several years, but the urgency of the program became apparent and the implementation process was accelerated. The majority of land trusts today are strong organizations doing good work, and they plan to participate in the accreditation program.¹³ The challenge is that training and technical assistance for building stronger organizations is critical to this accreditation process (LTA March 2005). Regardless of how successful land trusts are, there is always room for improvement regarding *Standards and Practices*. The most respected land trusts in the community still attend training sessions to learn how they can improve the effectiveness of their programs. For those organizations that are just getting started, training and assistance are an even greater need. Unfortunately, the service centers that provide training and technical assistance are currently scattered throughout the country and are not available locally for all land trusts.

There are a variety of organizations (referred to as service centers) working to fill this need, but there is little consistency regarding the quantity and quality of services provided by service centers across the nation. Without the proper training and technical assistance, the ability of land trust organizations to meet the national *Standards and Practices*, and ultimately accreditation, is going to be difficult. This study focuses on the training and technical assistance programs currently provided by service centers because of their important role in advancing the credibility and capacity of land trusts.

¹³ The Program Design Committee research shows that 80% of land trusts plan to participate in the accreditation program.

Service Centers

There are two recognized challenges with the role of service centers in the community today. The first is defining what a service center is in order to identify which organizations qualify as such. Defining a service center is difficult because a variety of organizations are working to meet the needs of land trusts in many different ways.¹⁴ With the exception of Chuck Roe's informal study in 2002 on Coalitions and Networks, there are no studies that examine the different types of training and technical assistance programs. This makes it difficult to recognize the common goals, understand how all of these organizations relate to one another, and define the group¹⁵. As a contribution to this dilemma, this study examines the different type of organizations providing services to land trusts and is intended to help identify a common definition for a service center.

The second challenge regarding service centers is that training and technical assistance efforts have been developed on a needs basis and have little consistency throughout the country regarding general operation and services provided. It is important that all land trusts have an equal opportunity to receive the training necessary to meet the *Standards and Practices*. In order to accomplish the overall mission of land trust capacity building, sustainable service centers with strong training and technical assistance programs must be established. This study develops a working model of organizational and service delivery components associated with a strong training and technical assistance program. The working model is then used as a point of comparison to assess the organizations. This assessment identifies the different type of service centers currently operating across the country, provides the groundwork for measuring the

¹⁴ At a recent service center meeting in Madison, Wisconsin participants commented on how a clear definition still has not been established in the land trust community.

¹⁵ Many of the networks and coalitions that Roe examined provide training and technical assistance, but these services were not the focus of his study.

capacity of service centers, and provides a basis for strategizing how professional land trust services can be delivered on a national level.

Research Purpose

The purpose of this research is three fold: (1) Establish a working model¹⁶ that identifies the components necessary to build and maintain a strong land trust training and technical assistance program; (2) Use the working model to assess service centers around the country, taking into account the uniqueness of each organization; and (3) Using assessment results, provide recommendations to enhance land trust training and technical assistance services throughout the country.

For the purposes of this study, land trust training and technical assistance programs are measured by organizational strength and quality of services provided. Accordingly, the model includes two major categories, Organizational Structure and Land Trust Services. The model is composed of several components within each major category, identifying what aspects of an organization result in strong organizational structure and high quality land trust services. Table 3.1 illustrates the components of the working model and the literature supporting each component. The working model is used as a tool to assess training and technical assistance programs provided by service centers throughout the country.

As mentioned earlier, the need for training and technical assistance is increasing due to the rapid growth of the land trust community, public awareness and the voluntary accreditation program. The diversity of organizations trying to fill this need makes it difficult to build a strong and unified effort across the country. With a better understanding of the organizations currently

¹⁶ The term “working model” refers to the “Practical Ideal Type” defined in Shields (1998, 215).

providing these services, a more unified effort of training and technical assistance can be designed based on the resources already in place.

Chapter Summary

The first section of this paper provides background information and develops the working model. **Chapter 2** discusses the history of land trusts and service center organizations, and elaborates on the public scrutiny of the land trust community and the actions being taken to address it. **Chapter 3** builds the working model used to assess the training and technical assistance programs. The working model is divided into two major categories, Organizational Structure and Land Trust Services. The chapter provides evidence for how each component of the working model was established.

The second section of the paper discusses the methodology and results of the assessment. **Chapter 4** discusses the methodology of the research, including the design and distribution of the survey, and the use of document analysis and web site analysis to complete the assessment. **Chapter 5** provides the results of the assessment, analyzing how the organizations compare to the working model. Each working model component is discussed and analyzed individually.

The final section of the paper includes the conclusions and recommendations of the study. **Chapter 6** presents the conclusions of the assessment and recommendations for how training and technical assistance programs can become a more unified and effective effort in meeting the needs of land trusts throughout the country. Conclusions include areas of strengths and weakness in the study and a summary of the assessment. Recommendations include a proposed definition for a service center, suggestions for improvement according to the working model and recommendations for how collaborative efforts between LTA and service centers can support a comprehensive national land trust services program.

Chapter 2. Background Information

The purpose of Chapter 2 is to discuss the history of land trusts and service centers, and to examine how the growth and public awareness of the land trust community has led to the need and desire for advanced training and technical assistance. The history and successes of land trusts demonstrate the public support that has been established over the past twenty years. The history of service centers emphasizes the growing need for land trust assistance, and the struggle to meet this need. The latter part of the chapter discusses the series of events that have increased public scrutiny. Although public trust and support has been established over the past twenty years, service centers and land trusts are now working together to maintain and strengthen public support during these times of rapid growth and increased public awareness. The following background sets the stage for why it is important to clarify what service centers are and recommend how a more effective system can be developed to secure the future of land conservation from the private, nonprofit approach.

History of Land Trust Organizations

A land trust, currently defined by the Land Trust Alliance, is “a nonprofit organization that, as all or part of its mission, actively works to conserve land by undertaking or assisting in land or conservation easement acquisition, or by its stewardship of such land or easements” (LTA 2003). Although land trusts have the word “trust” in their name, only a few “land trusts” are actually organized as trusts (Fairfax and Guenzler 2001, 22). Most are organized as 501(c)(3) nonprofit organizations with conservation purposes. Land trusts have a variety of missions, but all support land conservation using a wide range of protection efforts.

The two most common tools land trusts utilize for land protection are the purchase or acceptance of land and the purchase or acceptance of conservation easements (a legal agreement

that permanently restricts the development and uses of the land to protect its conservation values) (LTA 1996 and 2003). Fairfax and Guenzler (2001, 22) also include the acquisition of land or easements that are reconveyed to another public or private institution as a common method of land protection.

The first land trust, the Trustees of Public Reservations, was established in 1891 in Massachusetts. By 1902, 9,250 acres had been purchased for approximately \$5 million and was dedicated as a public park (Brewer 2003, 13, 19). Following the Trustees of Public Reservations, other advocacy groups started to have an interest in land preservation, such as the Audubon Society and various mountain clubs (such as the Alpine Club in 1863 and Sierra Club in 1892) (Brewer 2003, 20-21). The land trust movement grew slowly in the beginning (Brewer 2003, 24), but is now the fastest growing method for protecting land (Gustanski and Squires 2000, 14).

Richard Brewer (2003, 40) identifies two major periods of land trust expansion. From 1965 to 1975, land trusts grew at 9% per year likely due to the public environmental movement. Land trusts then grew at 16% from 1985 – 1988, and at 10% through 1990. Between 1983 and 1993, approximately one-half of the country's land trusts were incorporated and new groups were forming at the rate of more than one a week (Wright 1993, 270). The 2003 Census indicates that the number of land trusts is continuing to grow, reporting that the number of land trusts has increased 26% since 1998 (from 1,213 in 1998 to 1,537 in 2003). The number of land trusts grew rapidly over the past five years, and so has the number of transactions. As a result, unfortunately, there are more opportunities for errors to be made and for the system to be abused. In order to prevent questionable transactions and promote strong conservation efforts, the land trust community is looking to service centers for guidance on sound practices and procedures.

History of Land Trust Service Providers

The rapid growth of land trusts and increased public scrutiny has created a need for training and technical expertise on a local level. Over time, service providers have grown in numbers and in a variety of forms to meet these needs. One of the first organizations to provide networking and educational opportunities for land trusts was the Land Trust Alliance (LTA), previously known as the Land Trust Exchange. In addition to LTA, several state-wide and regional organizations have formed to assist land trusts on a more local level. This section discusses the history of both LTA and state/regional service centers, providing the background for the development and variety of services assisting land trusts today.

Land Trust Alliance (National Organization). In 1980 Kingsbury Browne, Jr. was curious about the diversity of land trusts throughout the country, and traveled around the nation to visit with a variety of land trusts. He immediately recognized the importance for land trusts to communicate with one another and share ideas. In October of 1981, he played a significant role in gathering together approximately forty organizations, including two dozen land trusts for the first national land conservation conference, the “National Consultation on Local Land Conservation in Cambridge, Massachusetts” (Brewer 2003, 35). This gathering is where the concept of the Land Trust Exchange organization was born. By 1982, the Land Trust Exchange, now called the Land Trust Alliance (LTA), was established with the sponsorship of four large land trusts and several smaller donors (Brewer 2003, 176 and Wright 1993, 270). “The alliance greatly increased communication among groups, served as a catalyst for innovations in

techniques, improved the training of members, and facilitated creation of new trusts” (Wright 1993, 270).¹⁷

Today, the Land Trust Alliance “promotes voluntary land conservation and strengthens the land trust movement by helping local land trusts across America to improve their program proficiencies and conserve more land for the benefit of communities and the natural environment” (www.lta.org). Over the years, LTA has become an excellent resource for land trusts around the country. LTA now holds an annual four day National Land Conservation Conference, known as “Rally”, attracting more than 1,600 attendees and offering more than 130 workshops. The *Exchange Journal*, published by LTA on a quarterly basis, also provides members with information about the cutting edge issues in the land trust community. A variety of conservation books and brochures are also published by LTA, such as *Appraising Easements*, *Federal Tax Law of Conservation Easements*, *Conservation Easement Handbook*, *Conservation Easement Stewardship Guide*, *Conservation Options: A Landowner’s Guide*, and *The Standards and Practices Guidebook* (Brewer 2003, 178)¹⁸.

Most recently, LTA has played a significant role in public policy and creating the accreditation program discussed later in this chapter. LTA has developed a strong working dialogue with Congress, rallied support from the land trusts across the country, testified before the Senate Finance Committee, and drafted reforms to support the continued success of private land conservation. LTA also conducted a year long research project to determine which credentialing system would be most effective, has developed the accreditation commission and is creating a training curriculum to support the program.

¹⁷ Wright cites Montana Land Reliance and Land Trust Exchange 1982; Brenneman and Bates 1984; Diehl and Barrett 1988; Stokes, Watson and others 1989

¹⁸ These publications can be found at www.lta.org

The Land Trust Alliance has provided a significant amount of leadership and professional guidance to land trusts throughout the country. Land trusts are not alone in identifying the importance and benefit of belonging to a national umbrella organization such as LTA. One-fifth of all nonprofits in the United States belong to a national umbrella association, and fourth-fifths of these are incorporated separately from the national organization, as are land trusts (Young 2001, 290).¹⁹ However, as the number of land trusts has grown, it has become increasingly difficult for LTA to meet the needs of all land trusts throughout the country. As a result, state and regional organizations have become more prominent in providing assistance on a local level.

State and Regional Service Centers. Over the past decade, land trusts throughout the country have been experimenting with state-wide collaborative efforts. Some collaborative efforts focus primarily on land protection projects, and other collaborations work to provide services to land trusts, such as training workshops or sample documents. Most of the land trust networks and coalitions are informal associations, but are a valuable resource to local land trusts. The more formalized associations are often referred to as “service centers” and provide a variety of training or technical assistance to local land trusts. All varieties of associations serve a vital role in “connecting land trusts within a region, and delivering capacity building services that mirror those that LTA delivers on a national level” (Soto 2004).

In 2002, Charles Roe examined these collaborative efforts and found a variety of models across the country. According to Roe (2002, 1), “No single model has yet emerged as superior, but experiences over the last ten years point clearly to productive and successful approaches to improving collaboration among land trusts. It is unlikely that any one model for land trusts coalitions will prove to be the ideal model for use everywhere, because circumstances around the country are so varied”. Roe’s study focused on collaborative efforts, but many of these

¹⁹ Young cites: Hodgkinson, Weitzman, Noga, and Gorski, 1993

collaborative efforts provided services to land trusts or were closely associated with an organization that provided services. Therefore, his recognition of different models for coalitions shows the variation of service centers as well.

Roe and Soto do note that “there are common denominators shared by nearly all of the existing alliances in the types of services and activities provided and in measurements of success” (Soto 2004). Some of the common services provided by these alliances include technical assistance, trainings, conferences, a voice in public policy, and networking. The common services noted by Soto and Roe provide a loose definition for service centers. As of 2002, there were approximately eighteen service centers identified. The working model in this study examines some of the common denominators to which Roe and Soto refer.

In the past, LTA and regional service centers have shared the common goal of assisting with the development of new land trust organizations. As the number of land trusts increased, the stability of these land trusts also became a concern. Although collaborative efforts are important in a variety of ways,²⁰ the importance of building sustainable land trusts has recently become a major focus of the conservation community. As a result, LTA and regional service centers have both focused their attention on assuring the strength, quality, and capacities of existing land trusts. LTA’s regional offices in particular work with land trusts locally through training, funding, mentorship, and direct attention (Roe 2002).

In addition to working with land trusts directly, LTA is also considering ways to work on a regional level and work in partnership with service centers to better meet the needs of the land trusts (LTA March 2005, 8). Vice President of LTA, Mary Pope Hutson states that “Land trust service centers help disseminate the flow of information and services in a particular state or

²⁰ Collaborative groups are formed for a variety of reasons, including collaborative land protection projects, public policy efforts, fundraising efforts, etc.

region, and that's where their strength lies. They are very familiar with state or local tax laws, local politics, and the types of land that are being saved in that particular area. The Land Trust Alliance works closely with land trust service centers to complement its own services, increasingly partnering with them in the delivery of important training programs for organizational capacity and conservation techniques" (Soto 2004,12). Pope makes it clear that it takes a partnership of both national and local efforts to provide effective training and technical assistance. This partnership is even more important in today's political and skeptical environment.

Current Challenges in the Land Trust Movement

Updating the national *Standards and Practices* and developing a credentialing program for land trusts has been LTA's long term goal for many years. In order to address the *Washington Post* articles and Congressional concern in 2003, these long term goals quickly became a reality and were expedited. The *Washington Post* articles were serious enough to catch the attention of Congress and resulted in a Senate Finance Committee investigation, IRS investigation, and the Joint Committee on Taxation's report for how to resolve the issues. Each level of scrutiny put additional pressure on the land trust community to act quickly. The *Standards and Practices* were revised in 2004, and an accreditation program was approved in fall 2005.

This section of the chapter discusses the progression of these events - from the day land trusts hit the newspapers in 2003 to the recent adoption of the accreditation program in September 2005. Each of these events emphasize the importance of implementing training and technical assistance as quickly and effectively as possible in order to help land trusts build their

organizational capacity during this time of growth, succeed in accreditation, and receive the public support and financial resources they need to fulfill their missions.

Washington Post Articles. Public scrutiny of the nonprofit sector is not a new phenomenon. In 1994, Kevin Kearns recognized that public scrutiny of nonprofits was increasing. An issue of *The Chronicle of Philanthropy* (January 26, 1993) included a story about a special Senate committee established to crack down on lax financial reporting by selected charities (Kearns 1994, 185). In 2003, however, *The Washington Post* brought public scrutiny specifically to the land trust community. The *Post* ran a series of articles challenging conservation transactions and organizational decisions of The Nature Conservancy and other conservation organizations.

The *Post* articles identified problems including conflicts of interest, financial irregularities, drilling for oil on nature preserves, selling land to trustees and providing loans for employees (Stephens and Ottoway 2004). The stories also reported that properties were being sold at reduced prices to the organizations' trustees, and then trustees were making cash donations roughly equal to the difference in price and qualifying for substantial tax deductions (Stephens and Ottoway 2003 and 2004). The Conservancy immediately banned several questionable transactions and organizational practices challenged by the *Post* articles (Stephens and Ottoway 2004). The organizational practices of The Nature Conservancy were one focus of the *Post* series, but unwarranted tax benefits flowing to the wealthy and insiders were also a significant issue (Stephens 2005).

Throughout the *Post* series, several land transactions were highlighted, providing examples of how landowners exploit tax benefits that are unwarranted. For example, the *Post* identified a Pennsylvania developer that took a substantial tax deduction for limiting

development on a piece of already “unusable” property. The article also discussed a luxury home developer in North Carolina that paid \$10 million for a tract of land, developed a third of it and then took a \$20 million dollar deduction for a conservation easement donation. These are only two of several examples that *The Washington Post* highlighted to show that tax deductions were being granted where the value of the deduction was not properly calculated (Ottoway and Stephens 2003).

The article also made reference to a GAO report which stated that “taxpayers generally overvalued their conservation easement deductions by an average of 220 percent” (Ottoway and Stephens 2003). Although the *Post* may have focused on a few rare transactions, the series was taken seriously by Congress, and the Senate Finance Committee decided to launch a full investigation of The Nature Conservancy.

Senate Finance Committee. The Senate Finance Committee began its investigation in May 2003 and completed its report in early May 2005. By the time the hearing took place, LTA had established an active dialogue with the committee. Fortunately, eleven Senators attended the hearing in May, and nearly all of them made strong statements about the value of conservation in their areas. However, there are still many reforms being considered by the Finance Committee.²¹ LTA considers some of the reforms to be positive, such as holding nonprofits responsible for monitoring and defending their easements. Unfortunately, many other reforms could challenge the ability of good conservation to continue, such as limiting tax deductions for certain small easements, and having Congress establish an accreditation program for land trusts.

LTA is communicating with Congress on a regular basis to educate them about the impacts of such reforms and to ensure that good conservation is still permitted and possible under the new reforms. In fact, the Senate recently passed a bill to increase the amount of tax

²¹ See www.lta.org/publicpolicy for details on hearing.

incentives available to landowners²². There is clearly support for conservation in the Senate, but a few minor changes in legislation *against* conservation incentives, could easily damage the entire land trust community. One example of this is illustrated by the proposed Joint Committee on Taxation report.

Joint Committee on Taxation Report. During the Senate Finance Committee's investigation of The Nature Conservancy, Senator Grassley (R-IA), Finance Committee Chairman, and Senator Baucus (D-MT), ranking minority member, requested that the Joint Committee on Taxation draft a proposal with their recommendations for how to resolve the abuse of conservation tax incentives. The JCT released their proposal January 27th, 2005. Although the JCT proposal did not pass, it was an excellent example of how quickly the land trust community can be impacted by legislation. The JCT report initiated a national uncertainty regarding the stability of land trusts, and made it essential for LTA to establish a strong dialogue with Congress to maintain an effective tax incentives program for land conservation.

The JCT report recommended that the type of acceptable easement be severely limited,²³ and that tax deductions on qualified easements be reduced to only thirty percent of the fair market value²⁴ (Joint Committee on Taxation 2005). The conservation easement restrictions were considered to be part of a larger plan to reduce loopholes that would raise approximately \$400 billion in tax dollars over the next ten years (Crenshaw 2005).²⁵ The report was praised by Grassley and Baucus, and was of interest on Capitol Hill due to the possibility of raising revenue

²² The bill provides for extending the carry-forward period for tax deductions from 5 to 15 years and raising the cap on conservation deductions from 30 percent of a donor's income to 50 percent - and to 100 percent for farmers and ranchers. The bill also includes a variety of changes in law affecting charities and charitable contributions, including a significant tightening of the rules on donations of easements for the protection of historic structures, and tightening of the rules on appraisers and appraisals of all donated property (including conservation lands and easements).

²³ The JCT report recommended eliminating tax incentives for conservation easements placed on properties of personal residence, and requiring that all conservation easements support a specific government project.

²⁴ 100% of the charitable gift is deductible under current law.

²⁵ This \$400 billion is not due solely from conservation easement tax incentives, but a variety of tax incentive recommendations in the report.

(Crenshaw 2005 and Stephens 2005). In a written statement, Grassley noted that "...ways to plug big leaks in tax compliance are important as we roll up our sleeves to deal with the deficit and address tax reform" (Crenshaw 2005). A good portion of Capitol Hill originally supported the JCT report, but the conservation community was outraged and immediately started to educate the committee about the threats of the proposal.

On behalf of the land trust community, LTA strongly opposed the JCT proposal. An LTA press release stated that "The LTA supports reform to stop appraisal abuses for conservation easement donations, but we strongly oppose the JCT's proposal to severely limit the current tax deductions for land conservation...a move that would cripple donations of conservation land" (Wentworth 2005). LTA believes that conservation through tax incentives is the best way to protect land with the current budget deficits and political opposition to federal land acquisition (Wentworth 2005). LTA supports the Senate Finance Committee's effort to target abuses and is working with land trusts to develop stronger standards and practices to prevent abuse.

Accreditation Program. The discussion of a credentialing program for the land trust community has been in progress for several years,²⁶ but was heavily emphasized and encouraged by the Joint Committee on Taxation and Congressional leaders. In addition to completing the revisions of the *Standards and Practices* already underway, LTA also created the Program Design Steering Committee to identify the "best way to ensure long-term public confidence in land trusts" (LTA Accreditation Brochure 2005). After a year of extensive research, the Committee recommended a voluntary accreditation program. More than one thousand comments were received and considered in the decision making process. The Steering Committee stated that an accreditation program will provide an independent review of land trusts, according to the

²⁶ The Quality Initiative for instance began in 2000.

established *Standards and Practices*, indicating the ability of a land trust to operate in an ethical, legal and technically sound manner (LTA Accreditation Brochure 2005).

In September 2005, the LTA Board of Directors adopted the recommendations to approve a voluntary accreditation and training program for land trusts. An independent accreditation commission will be established as a subsidiary of LTA, and will establish procedures for accreditation in 2006. A test round of applications will be accepted in 2007, and full operations will begin in 2008. According to LTA's research, approximately 80% of land trusts plan to apply for accreditation (www.lta.org/accreditation). Rand Wentworth considers accreditation as an "important step in ensuring public accountability in voluntary land conservation and building strong and lasting land conservation organizations".²⁷

The next step to building a sustainable land trust community is establishing an infrastructure of support and training that helps land trusts build their organizational capacity and implement the *Standards and Practices*. By implementing *Standards and Practices*, land trusts will build stronger organizations, and be better prepared for participating in the voluntary accreditation program. LTA will provide a great deal of support for training and education, including a comprehensive training curriculum based on *Standards and Practices*, but regional service centers are also going to play an important role in bringing support to a local level. Several states have developed land trust service centers to support and promote strong and sustainable land trusts (Soto 2004). The service centers operating today provide an important service to land trusts, but not all land trusts have an equal opportunity to receive these services. The service centers are limited in number, only cover a few regions, and each provide a different menu of services.

²⁷ This statement was made in an email correspondence announcing the accreditation program.

Conclusion

The land trust business has grown rapidly in both numbers and size over the past decade, and the need for training and technical assistance is also growing. Throughout history, land trusts have done their best to protect properties with significant ecological and conservation values throughout the country, and service providers have worked to guide land trusts in building strong organizations. Credibility and accountability of land trusts has been a priority for many years, but the need to formally recognize land trusts doing good work has become a priority of today. The Senate Finance Committee, in addition to local land trusts, have responded well to the idea of establishing an accreditation program for land trusts, and therefore LTA is moving forward with designing and implementing an appropriate program.

LTA has made it clear to the land trust community that partnerships with service centers across the country are going to be essential in implementing a training program to strengthen land trusts throughout the country. The challenge is that service centers are very diverse and have a range of capabilities in providing land trusts with sufficient training and technical support.

In order to provide land trusts with quality services on a national level, a national network of strong service centers must be established throughout the country. This research is based on a working model that identifies what components all service centers should consider in building and maintaining a strong training and technical services program.

As Chuck Roe concluded in 2002, no single model is likely to be ideal, due to the variety of need, circumstances, and history of land trusts around the country (Roe 2002 and Soto 2004). This research does not identify a particular organizational model that is ideal, but rather a working model of components that can be used to help a variety of service centers build a strong training and technical assistance program. A working model is used as a tool to explore who is

providing services, what types of services are being provided, and how they are being delivered. This study will provide a base of knowledge regarding the current services and service providers in order to build a more effective network of strong service centers across the country. The following chapter examines the working model used in this study.

Chapter 3. Working Model

There are a variety of active land trust service centers across the country. At the moment, it is not clear what services are being provided, what services are being neglected, and who will be responsible for filling in the gaps. Using a working model, this research completes an assessment of service centers throughout the country in order to establish a working database that identifies the number of service centers, how they operate, and the services they provide. This chapter justifies and explains the components of the working model.

Introduction to Working Model

The general nature of this study is exploratory because the service center phenomenon and challenge of providing adequate services to land trusts is in its early stages of development (Shields 1998, 211) and is a new issue (Babbie 1998, 80). However, the specific purpose of this study is gauging and uses a Practical Ideal Type conceptual framework²⁸ to assess training and technical assistance programs throughout the country. Similar to Weber's ideal type, referenced by Shields (1998, 215), this practical ideal type is a tool to understand the reality of today's training and technical assistance programs. The purpose of the working model in this study is to provide a potential standard for service centers to work toward, but more importantly to establish a point of reference and assessment mechanism (Shields 1998, 215) to examine the operations and activities of service centers. The model provides benchmarks to understand reality (Shields 1998, 215) in order to develop recommendations to improve reality.

²⁸ The term gauging is used to describe the research purpose and is typically associated with a practical ideal type micro conceptual framework. This research is "gauging" because the service centers are being compared to a working model, and recommendations are made for how they can improve according to the standard (<http://uweb.txstate.edu/~ps07/confame.htm>). The practical ideal type is also referred to as the working model.

The categories of the working model used to assess the service centers were established based on literature, expert opinions, informal interviews, and analysis of existing surveys²⁹. The working model components and associated literature sources are provided in Table 3.1. The working model is simply a tool for exploring training and technical assistance programs, and should not be interpreted as a perfect representation of a strong program. There are currently no official standards that define or qualify a service center.

The working model developed in this chapter has two major categories: Organizational Structure and Land Trust Services. Components found within each category are illustrated in Table 3.1 and discussed in detail throughout the chapter. The working model is designed to guide organizations in building and maintaining a strong land trust training and technical assistance program. This chapter discusses the literature that justifies, explains, and provides the foundation for the land trust service center working model.

Organizational Structure Components

The organizational structure of service centers is the first major category of the working model, exploring who service centers are and how they operate. As Roe identifies, there are several models of networks and coalitions currently being used across the country³⁰, and no ideal model has been identified (Soto 2002)³¹. Therefore, due to the diversity of successful organizational structures, the working model does not specify any one particular structure.

²⁹ Expert opinions were primarily based on an advisory group that I established in preparation for this research. The group included John Bernstein (LTA, Director of Conservation), Renee Kivikko (LTA Midwest), Kris Larson (Colorado Coalition of Land Trusts), Chuck Roe (LTA Southeast), and Carolyn Vogel (Texas Land Trust Council). Additional expertise included a variety of lectures from LTA Land Trust Rally conferences, and conversations with conservation leaders.

³⁰ Roe identifies several categories of service centers in his study including the “big sister model” for land trust collectives; land trust networks supported by a state agency; federations of land trusts; statewide land trust service centers; and an LTA-created network in New York.

³¹ Roe found that the earlier models for collaboration were initiated by strong, successful land trusts that were able and willing to reach out to the smaller groups. Roe believes that numerous experiments with building networks and coalitions will continue over the next decade or two and no single model has emerged as superior.

Instead, the working model includes a variety of components able to be incorporated into each individual organization throughout the country, regardless of composition.

Several of the organizational components included in the working model correspond to McClusky's (2002, 542) list of eleven functions of a governing board that are widely accepted by scholars and practitioners. One such function incorporated into the working model is to "determine the organization's mission and purpose, ensure effective fiscal management, and engage in strategic planning". The governance portion of the working model also corresponds with the *Land Trust Standards and Practices* in some instances, including strategic planning, staffing, and continuing education.

In order to design a strong training and technical assistance program, the "Organizational Structure" components of the working model include elements that represent a strong organization: a strong decision making body (**governance**), a clear definition of its goals (**mission**), a long term strategy to meet their mission (**strategic plan**), financial and administrative support to carry out the organization's strategic plan (**staff support and financial resources**), and cutting edge knowledge to meet the ever changing land trust needs (**continuing education**). In the next section, each of these working model components is explained in detail.

Governance. Literature reflects the ongoing discussion of which governance model³² is most effective. The underlying agreement is that a "one size" governance model does not "fit all" organizations (McClusky 2002, 541). There are a variety of governance models identifying the role of the governing board, but what is most important for the purposes of this working

³² One example of a governance model is John Carver's "Policy Governance" model.

model is that a formal governing body³³ is in place. The first governance component of the working model states that there is a **formal board of directors** as a governing body.

The composition of the board of directors is also a topic of discussion amongst scholars and practitioners. McClusky (2002, 540) highlights that the governance or executive responsibility of a nonprofit is to “ensure an effective answering and accounting to its multiple stakeholders, including all types of funders, other external constituencies, and the public, at large”. Similarly, John Bryson (2004, 20) states that “attention to stakeholders and their interests, external and internal environments, and strategic issues means that the actions ultimately agreed upon are more likely to be *politically* wise and that organizational survival and prosperity are therefore more likely to be ensured”.

In order to address the importance of stakeholders and constituencies, Chait et al. (1993) recommend that a governing body be composed of both stakeholder and constituency representatives. This is important for service centers in particular, due to the politics associated with land conservation in different regions³⁴, and the importance of balancing politics with what is best for the organization. Chait et al (1993, 68-69) recognizes that key constituencies must be engaged for the purposes of maintaining different points of view and challenging issues from multiple angles. Due to the variety of land trusts within each region, there is often a variety of perspectives that need to be considered.³⁵ Therefore, the second governance component of the working model recommends that the **majority of board members be land trust**

³³ There are a variety of structures including board of directors, advisory board, etc. that can have a variety of responsibilities or roles in the organization.

³⁴ Land conservation can raise a variety of political issues such as tax incentives, development of sensitive land, conflicts of interest, condemnation, funding, etc. Service centers can easily be involved with these issues when providing assistance or training to land trusts. The way in which service centers approach these issues can be very politically charged and impact the decision making process.

³⁵ Land trusts may be volunteer based or staff supported, they may work statewide or in a specific county/region, and will more than likely each work to protect different resources. Due to this diversity in organizational structure and mission, service centers must work to meet the needs of everyone, which requires the consideration of many perspectives.

representatives and the remaining members represent outside perspectives or constituencies³⁶.

Richard Chait, William Ryan, and Barbara Taylor (2005, 177) also suggest there be a mix of many skills including technical expertise, wealth, diversity, and political connections. Depending on the type of organization and its mission, these additional skills will likely vary. Chait et al notes that trustees “recruited principally as constituency representatives or tokens of diversity are frequently marginalized as stakeholder advocates or symbolic placeholders”. Therefore, it is not only stakeholders and constituents, but a greater variety of skills and backgrounds that lead to success. The diversity of skills and specific backgrounds were unable to be included in the working model since the type of diversity needed will differ for each organization.

Mission. Once a strong, representative, and diverse governing board is established, the purpose of the organization must be identified. Land trusts in each community have a variety of needs that service centers are trying to address. With limited time and resources, it is important for service centers to establish a clear mission and stay focused. Many authors and experts in the nonprofit management field agree that a well defined mission is critically important to organizational strategy and success (Chait et al 1993, 13)³⁷. Chait et al (1993, 13) specifically states that missions are the “essential context for major decisions”. During a time of such high demand for land trust services, service centers with a clear mission can stay focused and make more efficient and successful decisions.

³⁶ Depending on how the service center is structured, especially if the service center acts as a land trust, there may be a conflict of interest in having land trust representatives on the board of directors. In these cases, steering committees or other forms of representation should be considered in order to incorporate land trusts’ perspectives.

³⁷ Author cites Chaffee 1984 and Keller, 1983

Many organizations grow quickly and struggle with “deciding what they want to be when they grow up” (Young 2001, 289). Service centers are struggling with the same issues, identifying what their role is in the land trust and greater conservation community. At the moment, many service providers have a broad mission that incorporates activities outside of land trust services.³⁸ If service centers take on too many responsibilities outside of land trust assistance, land trust services may suffer in difficult times. On the other hand, organizations that do choose to focus primarily on land trust services also face a challenge. The rapid growth and variety of land trusts creates an overwhelming amount of service needs (Brewer 2003, 292) and requires service centers to prioritize their efforts. Whether an organization focuses on land trust services or provides a variety of services to their community, service centers are challenged with deciding what their priorities should be.

Brewer (2003, 292) recognizes that it is during such times of growth and turmoil that organizations need to focus on their mission and identity. Although missions are clearly an important component of all nonprofit organizations, establishing a strong mission and identity is important for service centers because they are young and growing organizations trying to serve a variety of land trust organizations each with different needs and expectations. The mission of an organization keeps goals in focus and resources prioritized. The literature makes it clear that the mission of an organization is critical in decision making and prioritization of goals, and therefore it is a significant component of this working model. In order to build and maintain a strong land trust training and technical assistance services program, **land trust services must be one of the primary purposes of the organization and be clearly reflected in the mission statement.**

³⁸ Many organizations that provide services to land trusts may also be involved in land transactions, public policy, lobbying, environmental education and outreach, etc. Providing assistance to land trusts is also not as appealing to donors as land protection projects or education, and makes it tempting for organizations to get more involved in other activities.

Strategic Planning. With a clearly defined mission, it is important to translate the mission into a practical work plan that provides guidance for reaching the organization's goals. Without a map of how to reach specific goals, it is often overwhelming for staff and difficult for the governing board to measure progress. A strategic plan is a document that clearly identifies the organization's long term goals, prioritizes the goals, and establishes a reasonable action plan for working toward those goals in a timely manner. Regardless of how an organization is structured, strategic planning guides organizations in what they are, what they do, and why they do it (Bryson 2004, 6). Bryson (2004, 6) argues that strategic planning accommodates divergent interests and values, fosters wise and reasonable analytical decision making, and promotes successful implementation and accountability. Service centers are challenged by an escalating client base and limited resources. Therefore, strategic plans are very beneficial in helping organizations to identify priorities, maximize resources, and implement organizational goals.

Curtis McClaughlin et al (1995, 1185) also focus on implementation and point out the importance of identifying what the service delivery system needs to do in order to support the strategy or mission of the organization. Related to implementation, the *Land Trust Standards and Practices* (Standard 1b) recommend that land trusts routinely evaluate their strategic plans to be sure they are consistent with their mission. Considering the changing needs of land trusts, a similar review process would likely be beneficial for service centers.

As the literature above suggests, strategic plans are an excellent tool to assist organizations in developing needs, strategies, and implementation plans.³⁹ The working model

³⁹ Bryson makes note of situations that are not appropriate for strategic planning and therefore should be taken into consideration when using the working model. Strategic Planning is not appropriate during a time at which the "roof has fallen in" and it is a time of crisis. It is also not appropriate when a key leadership role needs to be filled, or the key leadership role does not have the skills to facilitate the process. It is also not worth the energy to engage in a strategic plan that has a very unlikely chance of being implemented (Bryson 2004, 15-17). It is important for service centers to consider these situations prior to launching a strategic planning process.

takes a holistic approach to strategic planning, ensuring that the strategic plan is reviewed, updated, and implemented. The working model includes the development of a **strategic plan** that identifies organizational priorities and steps that must be taken to accomplish them. In the case of service providers, it is essential that **land trust services be specifically addressed in the strategic plan** although they may only be one component of the organization's overall strategic plan. Service providers must also take into consideration the changing needs of the land trusts by **reviewing the strategic plan annually**. The strategic plan must be **fully implemented and not used solely as a tool for discussion**.

Financial Resources. In order to successfully implement a strategic plan, the associated costs must be calculated and secured. Financial stability and administrative support play important roles in allowing the organization to provide the services necessary to implement the strategic plan and fulfill the overall mission. There are a variety of successful funding mechanisms and resources that service centers rely on, but many of them are region specific or organization specific. Therefore, this model focuses on those financial components that can be incorporated by all service centers regardless of, or in addition to, their primary financial resource. These components focus primarily on developing a strong membership base and providing adequate resources for administrative support.

Service centers currently use a variety of funding and administrative resources to support their organization (Roe 2002). Many service centers receive financial or administrative assistance from other organizations including a large land trust⁴⁰, government agency⁴¹, or the

⁴⁰ A few examples of this include The Maine Coast Heritage Trust supporting the Maine Land Trust Network, the Vermont Land Trust coordinating Vermont's statewide network, and the Little Traverse Conservancy supporting the statewide network in Michigan.

⁴¹ Two examples of this are the Maryland Environmental Trust, a state agency that provides land trust assistance, and Texas Parks and Wildlife which supported the Texas Land Trust Council for several years.

Land Trust Alliance⁴². Private and public grants can also be a significant funding source for service centers in some areas (Hamilton 2003, 13-15)⁴³. There are a few cases where service centers are involved with both land transactions and providing services (Hamilton 2003, 11, 13)⁴⁴. In these cases, the land transaction component of their organization provides a fundraising avenue that can often contribute to their overall financial stability.

Regardless of how service centers achieve financial stability, BoardSource recognizes the importance of adequate resources to ensure that current revenues are stable, and sustainable revenue sources are carefully cultivated. Techniques such as publication sales, membership dues, and other appropriate fees are listed as possible revenue-generating activities. Membership and fees-for-service are common sources of income for service centers. BoardSource also emphasizes that entrepreneurial leadership is very important today in order to find creative ways to financially support nonprofit organizations (Ingram 2003, 6-7). Service centers often have to be creative in finding new revenue sources and grant opportunities to achieve their goals.

Service center directors find it difficult to convey the importance of service centers and their impact on the success and credibility of land trusts. With the accreditation program being established, service centers may be able to better explain the importance of their services. As Michael Hamm points out, “the public will probably never fully appreciate the value of accreditation, but it is safe to assume that every man, woman, and child in the United States has benefited in some way from the operation of good accreditation programs” (Hamm 1997, ix). Hopefully accreditation will help explain the value of service centers, but it is still difficult to see or appreciate. Because of this challenge, developing a strong and diverse membership base that

⁴² New York land trusts rely primarily on LTA’s New York office for land trust services.

⁴³ In the case of Gathering Waters, public funding covers half of their budget through annual appropriations.

⁴⁴ The Conservation Trust for North Carolina was established for the express dual purpose of providing services to land trust and operating itself as a statewide land trust. Gathering Waters in Wisconsin is also unique in that it provides services and co-holds conservation easements, but does not independently acquire land or easements.

understands what the organization does and why it is important may be the most valuable tool for service centers.

Due to the challenge of fundraising, membership plays an important role in the stability of service centers. Fortunately, their membership base is primarily composed of land trusts, which are well educated about the issues, and understand the benefits of the service organization. However, in order to spread the word about service centers, it is important to grow a membership base to include other individuals and businesses. To reflect a financially successful and sustainable membership program, the working model includes a membership program where **the majority of land trusts in the service area are members, and each contributes a reasonable amount financially.** In addition to land trusts, **other organizations, individuals or businesses** should also support the service center with their membership, allowing for diversity in membership and spreading the knowledge beyond the land trust community.

Although a strong membership program provides a certain level of financial stability, it is important that the resources be spent wisely, and the appropriate administrative support be established to provide services on the ground. Appropriate allocation of funds will likely result in higher quality land trust services. It is essential to have adequate funding designated to administrative costs to assure that the program runs smoothly and professionally. The working model recommends that **more than 25% of the budget is dedicated to land trust services, and at least 10% of the budget is dedicated to general administration of land trust services**⁴⁵.

⁴⁵ These percentages are simply a measurement tool and not based on any specific guidelines. There were verbal concerns from service center leaders that land trust services are often a small percentage of the overall budget, and there is rarely enough administrative support to provide quality services. The Better Business Bureau (<http://www.give.org/standards/newcbbbstds.asp>) recommends that 65% of the budget be spent on programs. For the purposes of building a measurement tool, an assumption was made that approximately 1/3 of the 65% is a reasonable amount to spend on land trust services and approximately 1/3 of the 30% of administration/overhead of the programs is a reasonable amount to dedicate to administration of land trust services.

Staff Support. Most service centers today are associated with larger organizations, and incorporate staff responsibilities in a variety of ways. Many service centers are funded by a strong land trust or state agency that dedicates a percentage of staff to providing support for land trust services (Roe 2002). Regardless of the method for obtaining staff support, it is important for service centers to have the staff support necessary to carry out the tasks of the organization and provide assistance to land trusts on a daily basis. The working model includes **at least one full time staff person dedicated to land trust services.**

Continuing Education. With a well developed land trust training and technical services program in place, it is important that the program remain strong as the dynamics of the conservation field change over time. Given the ever changing nature of the conservation field, Board members must actively seek continuing education opportunities to regularly enhance their skills and knowledge (Chait et al 1993, 27-28). In the case of service centers, organizations are typically very small, and the staff and volunteers work very closely with the board. Therefore, the importance of staff and volunteers to stay well educated is equally as important as the board. The *Land Trust Standards and Practices* (2004, Standard 7d) also encourage volunteers and staff to have the "appropriate training and experience for their responsibilities and/or opportunities to gain the necessary knowledge and skills".

Chait also emphasizes that board members should not rely on board packets or osmosis as a form of education, but should actively seek educational opportunities and enhance their skills and knowledge (Chait et al 1993, 27). The literature recommends that trustees attend national conferences aimed at board members, read relevant periodicals on cutting edge issues, or conduct seminars to educate one another (Chait et al 1993, 28). It is also an effective practice to distribute a conference report or provide a brief presentation to the board and staff following

conferences that only a few board members attended. If board members are aware that a report will need to be given on the conference they attend, they are more likely to pay close attention to the information being conveyed (Chait et al 1993, 35). For service centers, such reports are also an opportunity for staff and volunteers to learn from board members.

In order to remain well educated on the pressing issues associated with the role of service centers in the conservation field, **staff, volunteers and/or board members should attend a training program at least once a year.** In order for the information to remain with and/or spread throughout the organization over time, the information from the training programs should be **formally presented** to other organization staff and board members.

Land Trust Services Components

Literature suggests that land trusts are proactive and effective organizations, but are still in need of training, technical assistance, and general consultation to improve areas such as scientific expertise, better documentation of transactions, and stronger stewardship programs (Brewer 2003, 290-292). Christina Soto (2004) notes that most service centers provide technical assistance, trainings, conferences, a voice in public policy, and networking.

The challenge is that land trusts have a wide range of sizes, scope, budgets, and activities (Fairfax and Guenzler 2001, 21) and therefore a variety of needs. John Wright identifies a number of factors that contribute to differences between and distribution of land trusts, including economics, transient populace, racial composition, political attitudes, and legal barriers (Wright 1993, 278). Each of these factors result in a variety of needs from each individual land trust, and require an array of training, technical assistance, networking and general consultation provided by service centers.

In addition to literature, needs assessments completed by service centers and LTA regional offices identify specific areas of training and technical assistance requested by land trusts. The accreditation program has created an additional pressure to improve organizational practices and procedures, and there are a variety of services that land trusts are looking for to enhance their ability to meet the *Standards and Practices*.

The working model is designed to encourage land trust services that provide the **training** necessary for land trusts to understand the expectations of *Standards and Practices*, the **technical assistance** to help land trusts implement the practices, and the **general consultation** to support the transitions land trusts experience throughout the process of growing and strengthening their organization.

Training. Brewer recognizes the value of the Land Trust Alliance national training opportunities, but claims they are only the nuts and bolts of conservation. It is important to have more localized training opportunities covering a wide range of land transaction and organizational management topics (Endicott 1993, 296). The spread of “misinformation” is having a significant impact on conservation (Ottaway 2003). “Lawyers and accountants and promoters and investors are giving them [landowners] bad information, telling them they can do this or that and claim a big deduction, and there aren’t enough people out there telling them they can’t” (Ottaway 2003). Land trusts with cutting edge information will be more capable of conducting high quality conservation transactions and spreading more accurate information throughout the community. Regardless of the accreditation program, Hamm argues that if the identified need is to improve the operation and performance of organizations, then a program of targeted educational efforts should be considered (Hamm 1997, 68).

Training workshops were documented as the second most important service needed by land trusts in Georgia (Roe, December 2004) and the highest priority need in South Carolina (Roe, October 2004), Southern Appalachian region (Roe November 2004), and the Ohio, Indiana, and West Virginia region (Kivikko 2004).⁴⁶ It was clear in the assessments that training was one of the most valuable and needed areas of assistance in the land trust community.

The Land Trust Alliance currently provides a central source of information that land trusts and service centers can use for training and educational purposes. A new curriculum is also being created to help land trusts implement *Land Trust Standards and Practices* and prepare for accreditation (LTA October 2005). This curriculum is being designed specifically to be used by service centers across the country in their training programs. Therefore, service centers will likely play a critical role in disseminating the information from LTA to a local level. In order to provide adequate training opportunities for land trusts, the working model recommends that at least **one annual training opportunity be offered by the service center, and service centers should inform land trusts of additional outside training opportunities.**

Technical Assistance. Federal, state and local legislation is constantly changing and causing the land trust movement to improve their policies and procedures on a regular basis. Therefore, it is essential for land trusts to remain on the cutting edge and have access to the most current information for educational and operational purposes. Keeping land trusts informed about current policy issues is the most direct way to keep land trust operations accurate and effective. For instance, Public Law No: 108-357 now requires landowners to attach their full appraisal to the 8283 form when applying for a conservation easement deduction greater than

⁴⁶ In Georgia, training for board members was a higher priority than staff, but South Carolina considered training for staff higher than training for board members.

\$500,000⁴⁷. This rule greatly impacts landowners working with land trusts, and is important information for the land trusts to be aware of.

Helping land trusts improve their programs to address these changes is also an important component of keeping procedures up to date. Examples of land trust policies, procedures and plans was one of the highest priorities in the needs assessment for South Carolina. Georgia and the Southern Appalachian region also considered it a high or medium priority. Access to examples of policies and procedures can accelerate the process of revising existing policies. Therefore, the working model recommends that service centers **keep land trusts informed of current policy issues** and **provide them with sample documents** for land trusts to reference.

In order for land trusts to work effectively with landowners, it is important that landowners receive accurate and thorough information about private land conservation and conservation easements. Service centers can assist land trusts by producing regionally focused brochures. Ideally, all landowners would receive the same information across a state in order to ensure a consistent and accurate message. The working model recommends that service centers **provide materials that can be distributed to landowners.**

Land transactions can be very complex and the challenges land trusts face are often unexpected. Whether it is a legal issue regarding mineral rights or property boundaries, an appraisal concern about development rights, or defining habitat boundaries for endangered species, professional assistance must be available to land trusts. It is often difficult to find an expert opinion regarding conservation easements since it is still a growing field. Service centers can play an important role in identifying experts in a variety of professional fields that are willing and able to assist land trusts. With a list of references, any questions that the service center cannot address can be forwarded to a professional that can research the problem.

⁴⁷ The law can be found at http://www.lta.org/publicpolicy/pl_108_357.htm

Therefore, the working model includes a component for service centers to maintain **a list of references for professional guidance.**

The last component of technical assistance is **maintaining a database of land protection projects.** Many land trusts considered strategic conservation planning as a high priority in their needs assessment. In addition to land trusts being strategic individually, the idea of land trusts envisioning a strategic conservation plan on a more regional level is also becoming popular in the land trust community⁴⁸. If service centers begin to develop a statewide database of conservation projects, it will help land trusts maintain a more regional vision in their conservation efforts, provide a framework to prioritize projects⁴⁹, and support regional fundraising efforts.

Collaboration and Networking. Networking is one component that does not involve direct educational services, but rather provides the infrastructure for organizations to learn from one another. This is a common component for service centers to focus on in the beginning stages of forming their organization. There are several reasons why nonprofits may find that collaboration and networking are important. Rural or dispersed populations often have cultural differences, difficulty in accessing services, and are often hesitant to collaborate with neighbors when resources are limited and their self-interest is a driving factor (Snaveley and Tracy 2000, 148-149). Service centers provide an opportunity to bring organizations together and address cultural aspects of the community that a national or regional organization may not be able to attend to. With respect to local issues and cultures, land trusts joining forces can also have a

⁴⁸ A presentation at the 2005 service center meeting in Madison showed service centers how GIS mapping could be used to map conservation projects on a statewide level.

⁴⁹ Collecting information about land conservation projects across a large area can be time consuming and expensive. If the service center can be the clearing house for such information, everyone can benefit from knowing where current and future projects are and make more educated decisions about their own efforts and priorities.

much stronger impact on public policy issues and large land conservation transactions (Soto 2004).

When organizations go beyond sharing information and share resources or coordinate services, their effectiveness and efficiency can often be maximized (Snively and Tracey 2000, 147). Barbara Gray's definition of collaboration is "the pooling of appreciations and/or tangible resources, e.g. information, money, labor, etc, (2) by two or more stakeholders, (3) to solve a set of problems which neither can solve individually" (Gray 1985, 912). Land trusts are beginning to show evidence of such partnerships with the guidance of service centers⁵⁰. In order for land trust communities to work together and maximize their impact on their community, service centers must **provide an up-to-date directory** that introduces all of the land trusts to one another, including contact information. Service centers must also **encourage and facilitate networking and collaborative opportunities** for land trusts to communicate with one another, share experiences, and consider collaborative conservation efforts. Roe believes that "everyone in the land trust community concurs with the intent and readily acknowledges the benefits deriving from greater collaboration among land trusts that operate in the same region or state" (Soto 2004). This statement was supported by many of the land trust needs assessments, which identified collaboration as an important component of success.

General Consultation. As the land trust community grows, organizations change, policies change, and the structure of the conservation community changes. Service centers must support these changes by providing **general consultation and guidance for new land trusts, land trusts in transition, and land trusts considering merger**. As land trusts grow, they may need to update their policies, launch a capital campaign, or review their mission. For example,

⁵⁰ For example, under the guidance of the North Carolina Land Trust Council, a collaborative effort was made to receive a Knight Foundation grant to fund a program for educating professionals about land trust work and conservation easement transactions in parts of North Carolina and South Carolina.

guided organizational assessments are a tool used by land trusts to assess how their organization currently compares to the national *Standards and Practices*. LTA provides a book to guide organizations through the process⁵¹, but outside consultants or service centers are often involved to provide general guidance and consultation. Land trusts may also consider merging with one another to combine and maximize resources. Service centers can support these changes by providing general guidance, support, or facilitation.

Summary of Working Model

The literature and expert opinions discussed above identifies some of the most important components necessary to build and maintain a strong land trust training and technical assistance program. These necessary components, supported by the literature, build the working model illustrated in Table 3.1. The working model is composed of two major categories, Organizational Structure and Land Trust Services. Each category is supported by a series of smaller components. Each component is then defined by specific elements which are illustrated in Table 3.1 and highlighted in the above text. For example, Organizational Structure is a major category, with one element being governance. Governance is defined by whether organizations have a formal board of directors, and if the majority but not all board members are land trust representatives (see Table 3.1).

The Organizational Structure category of the working model recognizes an organization that has a strong **governing body** to lead and manage the organization, a **mission** focused on land trust assistance, a **strategic planning** process to achieve their goals, the **financial stability** to maintain a strong program, the **staff** support to carry out daily operations, and is well **educated** on the cutting edge issues of land conservation. The Land Trust Services category

⁵¹ “Assessing Your Organization” guides board/staff through a detailed and in-depth analysis of the organization's systems and procedures, and assists with incorporating the results into action steps for strategic and annual plans.

includes components that address land trust needs regarding training, technical assistance and general consultation. The land conservation field is growing rapidly, and changing frequently. The working model is designed to help land trusts receive adequate **training** to stay on top of current issues, **technical assistance** to implement changes to address new concerns, and the **general consultation** necessary for managing organizational change.

The working model is a tool used to assess service center organizations across the country. The purpose of the assessment is to identify which organizations are providing land trust services at this time, what organizational structure they are currently operating under, and what services are being provided. Table 3.1 summarizes the working model and the literature discussed above that supports the model.

Table 3.1 Working Model for Land Trust Training and Technical Assistance Programs

ORGANIZATIONAL STRUCTURE	Soto 2002, McClusky 2002
Governance	McClusky 2002, Bryson 2004, Chait et al 1993 and 2005
1. The governing body is a formal board of directors. 2. The majority, but not all board members are land trust representatives.	
Mission	Chait et al 1993, Young 2001, Brewer 2003
1. Primary purpose of organization is to provide land trust services. 2. Land trust services are reflected in the organization's mission.	
Strategic Planning	Bryson 2004, McLaughlin 1995
1. The organization has a strategic plan.	
2. The strategic plan discusses land trust services.	
3. The strategic plan is reviewed annually. 4. The strategic plan is being implemented.	
Financial Resources	Roe 2002, Hamilton 2003, Hamm 1997, Ingram 2003
1. Majority of land trusts are members.	
2. More than one type of membership.	
3. Benefits are provided to members.	
4. No one land trust contributes significantly more.	
5. More than 25% of the budget is dedicated to land trust services. 6. More than 10% is dedicated to general administration for land trust services.	

Staff Support	Roe 2002
1. There is at least one full-time staff person dedicated to land trust services.	
Continuing Education	Chait et al 1993, Land Trust Standards and Practices 2004
1. At least one Board/Staff member ,Volunteer or Intern is sent to a land-trust focused training each year.	
2. Information from conferences is formally presented to other board/staff members.	
LAND TRUST SERVICES	Brewer 2003, Soto 2004, Fairfax and Guenzler 2001, Wright 1993
Land Trust Training	Endicott 1993, Ottoway 2003, Hamm 1997, Roe 2004, Kivikko 2004, LTA October 2005
1. Organizes at least one training opportunity per year.	
2. Organization informs land trusts of outside training opportunities.	
Land Trust Technical Assistance	Public Law 108-357, Roe 2004
1. Keeps land trusts generally informed of public policy issues.	
2. Provides materials that can be distributed to landowners.	
3. Provides examples of documents, policies and procedures upon request.	
4. Provides names/references of professional services.	
5. Provides an inventory/database of land projects in the service area.	
Land Trust Collaboration/Networking	Snaveley and Tracy 2000, Soto 2004, Gray 1985
1. Provides a directory of land trusts across the state/region.	
2. Provides opportunities for land trusts to network.	
3. Provides opportunities for land trusts to share information and personal experiences.	
4. Encourages and facilitates collaborative opportunities.	
Land Trust General Consultation	LTA 2004
1. Facilitates the development of new and growing land trusts.	
2. Offers guidance for land trusts in transition.	
3. Offers guidance for land trusts considering a merger.	

Chapter 4. Methodology

The purpose of this chapter is to describe the methodology used to identify the population, operationalize the conceptual framework, and complete the assessment of land trust training and technical assistance programs. Training and technical assistance programs are the unit of analysis for the study and the primary source of evidence is a survey. Additional data collection techniques include document analysis and web site analysis in order to assess the organizations from multiple perspectives, using multiple sources of evidence.

Introduction

The beginning of the chapter focuses on how the “service center” population was defined and established without having a clear or agreed upon definition for a “service center”. The latter half of the chapter describes the methodology for operationalizing the conceptual framework and conducting the actual assessment of land trust training and technical assistance programs. The working model built in Chapter 3 is the point of comparison for the assessment, and is operationalized by a list of survey questions related to each of the working model components. Table 4.1, Operationalization of the Working Model, illustrates how the working model components are connected to specific survey questions, in addition to the other methodologies.

Population

As discussed earlier, the concept of a “service center” is still new to the conservation community and a clear definition is not yet agreed upon. Therefore, prior to completing the assessment, the “service centers” providing training and technical assistance to land trusts had to be identified. According to the Land Trust Alliance, “land trust service centers (alternatively known as councils, service bureaus, coalitions, alliances, and compacts) work closely with LTA

and land trusts to deliver services and technical assistance that strengthen local and regional organizations that conserve open space”.⁵² According to this definition, nearly any type of conservation organization can choose to provide support to land trusts on an informal basis. This factor opens up the opportunity for a variety of organizations to provide a diversity of services. For the purposes of this study, service centers are defined as organizations that provide structured training and technical assistance on a regular basis to strengthen land trusts in a specific state or region.

The population of organizations was developed over time through expert opinions, phone conversations, and web site analysis. The original list of possible organizations was established by combining the list of service centers posted on LTA’s web site, a contact list from Carolyn Vogel⁵³ and attendance lists from previous “service center” meetings⁵⁴. These three lists represented organizations that considered themselves service centers, clearly provided technical support to land trusts, and were well known by the conservation community.

An additional list of organizations from the Land Trust Alliance⁵⁵ was also considered. This list included organizations that played a leadership role in particular states, and acted as the point of contact for LTA to disseminate information to the state level. Many of these organizations received a survey for this study, but web site analysis and follow up phone conversations found that most of these organizations did not formally provide training or technical assistance to land trust organizations.

⁵² This definition can be found at: http://www.lta.org/resources/service_centers.htm.

⁵³ Carolyn Vogel is a member of the Program Design Steering Committee and the Executive Director of the Texas Land Trust Council. She has played a critical role in establishing a network of “service center” organizations throughout the country.

⁵⁴ Over the past several years, service center organizations have been gathering together in Washington D.C. each spring to discuss their role in the land trust community and network with one another.

⁵⁵ The Land Trust Alliance shared a list of organizations throughout the country that they use as a communication network for disseminating information to the state level.

Out of forty two organizations originally considered for the study, the final population resulted in twenty two organizations. The conservation groups excluded from the final population did not provide structured training and technical services to land trusts on a regular basis.⁵⁶ The assessment was designed for training and technical assistance programs, and therefore it was necessary for the service centers to provide (or intend to provide in the near future) organized services on a regular basis in order to be assessed accurately.

The most challenging aspect of defining service centers appeared to be the diversity of organizations involved, and variety of services provided. In order to clarify the role of service centers and build a strong nationwide system for providing training and technical assistance to land trusts, the working model and assessment focuses on these two major challenges or discrepancies, organizational structure and land trust services. The remainder of this chapter discusses the methodology used to assess organizations using the working model.

Data Collection

The primary tool for data collection was a survey. The survey is an effective tool for collecting data for analysis and assessment purposes. In this study, the survey allowed for considerable flexibility in analysis, while providing a standardized questionnaire to use as a measurement tool (Babbie 2004, 274). However, the survey limits the researcher's awareness of new variables (Babbie 2004, 275). Since little is known about service centers, it was expected that new and unknown factors would likely appear in the survey. In order to address this weakness and accurately determine whether or not the service centers were consistent with the working model, the programs needed to be examined from a variety of perspectives, taking into

⁵⁶ Approximately eight were land trust organizations that did not formally provide land trust services and 8 more were involved in collaborative land protection projects or land trust networking, but not in training or technical assistance. Four additional organizations were unable to be reached, but were not considered to be well established service centers by other professionals in the community.

account different kinds of data. Document analysis and web site analysis were the additional methodologies used. Table 4.1 illustrates how each working model component is operationalized by survey elements, in addition to the other methodologies. For example, Strategic Planning is one component of Organizational Structure. It is operationalized by asking questions such as whether or not the organization has a strategic plan and if it includes land trust services. As an additional source of evidence, the strategic plan itself was analyzed to confirm that it existed and included land trust services. This holistic approach to gathering information was applied to the entire working model. The remainder of this chapter discusses the details regarding the design and distribution of the survey in addition to how the other methodologies were used to complete a thorough assessment.

Survey

Survey Development and Design. In April 2005, a conference call was conducted with the research team⁵⁷ to discuss the variety of service center organizations and the type of information that should be collected in this study. The basic framework for the working model and survey questionnaire was developed from this initial conversation. The working model and survey questionnaire was revised throughout April and May 2005. In June 2005, the final survey was reviewed by the research team for content and format. Questions were revised to address the variety of respondents and provide ample opportunity for organizations to explain their answers.

To address the variety of service center organizations participating in this study, survey questions asked for information beyond the specific working model components, and provided opportunities for additional comments throughout the survey.

⁵⁷ As mentioned earlier, this included Carolyn Vogel, Chuck Roe, Renee Kivikko, and John Bernstein

For example, one working model component recommends that organizations operate under a formal board of directors. Instead of asking organizations whether or not they meet this criterion, the survey asked what type of governing body the organization has. This question uncovered the fact that many training and technical assistance programs are guided by an advisory group that operates under a larger governing board of directors. Although the working model recommends a formal board of directors, many successful programs operate within a larger organization. Without the detailed question in the survey, understanding the structure of these organizations would be difficult. Analyzing questions such as these required a careful review of each survey, in particular the comments provided throughout the questionnaire.

Due to the complexity and variation of the training and technical assistance programs across the country, surveys were often followed up with a phone conversation or email exchange to clarify specific questions. The final analysis of the survey responses and explanations resulted in a wealth of information about these organizations.

Survey Distribution. The timing of the survey was based on the calendar of the conservation community. The fall season is especially busy, due to the completion of land transactions at the end of the year and the national Land Trust Rally conference in October. Therefore, the majority of the surveys were distributed and completed in the summer months. In June 2005, a trial survey was tested by six organizations⁵⁸. Babbie notes that no matter how carefully a survey is constructed, there is always room for error, and the best protection against this is to pretest the questionnaire (2004, 256). Although it is not required that the pretest be completed by a representative sample (Babbie 2004, 256), the group of six organizations was

⁵⁸ This test group included the research team and three additional organizations familiar with my research and willing to provide feedback.

selected to represent a variety of service centers. This increased the chances of difficulties in the survey being detected at an early stage.

In order to spend additional time clarifying the population list, the survey was distributed in two phases. In July 2005 the survey was first distributed to a group of nineteen service center organizations that were identified as established service centers, and important organizations for the study⁵⁹. The survey was posted on SurveyMonkey.com, and hard copies were also made available. An email was sent to the executive director (or equivalent) of each organization, introducing the study and requesting their participation in the survey. All participants chose to use surveymonkey.com to complete the survey. In August 2005, an additional twenty three surveys were distributed to the remaining organizations still under consideration for the study. Following receipt of the survey or additional follow up, most of these twenty three organizations were determined as not applicable for this study⁶⁰.

The final population consisted of twenty two organizations, representing seventeen states and three regions of the country. The surveys were returned over a four month period (August – November). Similar to Babbie’s recommendation for mail based surveys, the link to the survey was included in all follow up messages (2004, 260), making it easiest for the respondent to participate. The surveys were analyzed after they had all been received. Reviewing the surveys together at one time supported a comprehensive understanding for how the population compared to the working model as a whole, with all explanatory comments taken into consideration. In addition to the survey results, other methodologies were used to confirm the survey responses. The other methodologies include document analysis and web site analysis. In the process of

⁵⁹ This list was based upon attendance lists from previous service center meetings and Carolyn Vogel’s contact list.

⁶⁰ Approximately eight were land trust organizations that did not formally provide land trust services and 8 more were involved in collaborative land protection projects or land trust networking, but not in training or technical assistance. Four additional organizations were unable to be reached, but were not considered to be well established service centers by other professionals in the community.

analyzing survey results, these additional methodologies were helpful in clarifying complicated or questionable survey responses. The next section discusses the details regarding how the other methodologies were carried out.

Other Methodologies

In order to complete a thorough assessment, multiple sources of data were collected and analyzed to examine service centers from a variety of perspectives. The operationalization table (Table 4.1) not only links the working model components to the survey questionnaire, but also identifies the additional methodologies and data sources used to assess the organizations. The additional methodologies include document analysis and web site analysis.

Document Analysis. All participants were asked to provide organizational documents to support their survey responses. Requested documents included: strategic plan, list of programs/services provided, annual reports/financial information, membership brochure/information, board of directors roster, by-laws, land trust directory, and publications/newsletter. Not all organizations were able to provide the complete list of documents, but the majority of organizations provided some type of documentation to support their survey responses. Each document that was received was reviewed according to the working model components, and was compared to the survey results for each individual organization.

For example, respondents were asked whether their strategic plan discussed land trust services in particular. The strategic plan documents were collected and examined to determine if land trust services were incorporated into the plan. See Table 4.1 for the details regarding how the document analysis contributed to other components of the working model. Tables in the

Results chapter provide information regarding the number of documents reviewed and their consistency with survey responses.

Web Site Analysis. In addition to the documents provided, the majority of organizations have a well established web site with an extensive amount of information. Each web site was analyzed according to the working model, and information was compared to the survey responses. Tables in the Results chapter provide information regarding the number of web sites reviewed and their consistency with survey responses. For example, many web sites provided information about upcoming events, policy issues, conferences, and resources for land trusts. Many of the land trust services provided by the organization were advertised or available on the web site. The web sites were an excellent resource for examining questions regarding services provided (including conferences, sample documents, and land trust directories) in addition to learning about the mission and purpose of the organization. Table 4.1 identifies the specific working model components that were examined using web site analysis.

Table 4.1 Operationalization of Working Model for Land Trust Training and Technical Assistance Programs

Major Category	Ideal Type Category and Elements	Survey Item for Service Centers	Code	Other Methodology/Source of Evidence (WA = web site analysis DA = document analysis)
ORGANIZATIONAL STRUCTURE	Governance			
	1. The governing body is a formal Board of Directors.	Who is the governing body of your organization?	Board/ Advisory/ other	WA and DA / board list
	2. The majority, but not all Board Members are land trust representatives.	How many board/advisory group members does your organization have at this time?	open	
		How many members of your board/advisory group are land trust representatives	open	
	Mission			
	1. Primary purpose of organization is to provide land trust services.	Is the primary purpose of your organization to provide services/support to land trusts?	y/n	WA / mission statement
		Is providing land trust services one of several purposes?	y/n	
	2. Land trust services are reflected in the organization's mission.	Are the land trust services/support that you provide reflected in your organization's mission?	y/n	
	Strategic Planning			
	1. The organization has a strategic plan.	Does your organization have a strategic plan?	y/n	DA / Strategic Plan
	2. The strategic plan discusses land trust services.	Does the Strategic Plan specifically discuss land trust services?	y/n/na	
	3. The strategic plan is reviewed annually.	Does your organization review the strategic plan annually?	y/n/na	
	4. The strategic plan is being implemented.	Is the Strategic Plan being implemented?	y/n/na	WA and DA / Program documents, reports on activities
	Financial Resources			
	1. Majority of land trusts are members.	How many land trusts are members of your organization?	open	n/a
How many land trusts are within your region of service?		open	n/a	

ORGANIZATIONAL STRUCTURE CONTD	2. More than one type of membership.	What types of members make up your membership base (land trusts, individuals, corporations, etc.)?	open	WA and DA / membership information	
	3. Benefits are provided to members.	What benefits do members receive?	open		
	4. No one land trust contributes significantly more.	If land trusts pay annual dues, what is the dues structure?	open	n/a	
		If land trust contributions vary, what percentage of your budget comes from the largest land trust donor?	Categ.II	n/a	
	5. More than 25% of the budget is dedicated to land trust services.	What percentage of your budget is dedicated to land trust services?	Categ.I	n/a	
	6. More than 10% is dedicated to general administration for land trust services.	What percentage of your budget is allocated specifically for general administration of land trust services?	Categ.I	n/a	
	Staff Support				
	1. There is at least one full-time staff person dedicated to land trust services.	Does your organization have the equivalent of at least one full time staff member dedicated to providing land trust services?	y/n	WA and DA / staff list	
	Continuing Education				
	1. At least one Board/Staff member/Volunteer or Intern is sent to a land-trust focused training each year	Does your organization send a representative (board/staff member/volunteer/intern) to at least one land trust focused training per year (LTA Rally or regional/statewide conference)	y/n	DA / attendance list for LTA Rally	
2. Information from conferences is formally presented to other board/staff members.	Is information from the conference formally presented to other board/staff members?	y/n	n/a		
LAND TRUST SERVICES	Land Trust Training				
	1. Organizes at least one training per year.	How many training opportunities (single or multi-day) does your organization typically organize each year?	#half day/ #one day	DA / program documents	
	2. Organization informs land trusts of outside training opportunities	Does your organization inform land trusts of outside opportunities for training?	y/n	WA and DA / announcements for training on web and in newsletters	
	Land Trust Technical Assistance				
	1. Provides materials that can be distributed to landowners.	Does your organization provide materials that can be distributed to landowners ?	y/n	WA and DA / publications and information	
	2. Provides examples of documents, policies and procedures upon request.	Does your organization provide examples of documents, policies and procedures upon request ?	y/n	WA and DA / sample documents	
3. Provides names/references of professional services.	Does your organization provide names/references of professional services?	y/n	WA and DA / list of professional references		

LAND TRUST SERVICES CONTINUED	4. Provides an inventory/database of land projects in the service area.	Does your organization provide an inventory/database of land projects in your service area?	y/n	n/a
	Land Trust Collaboration/Networking			
	1. Provides a directory of land trusts across the state/region.	Does your organization provide a directory of all land trusts across the state (or region if applicable)?	y/n	WA and DA / Land Trust Directory
	2. Provides opportunities for land trusts to network.	Does your organization provide opportunities for land trusts to network?	y/n	n/a
	3. Provides opportunities for land trusts to share information and personal experiences.	Does your organization provide opportunities for land trusts to share information/personal experiences	y/n	n/a
	4. Encourages and facilitates collaborative opportunities.	Does your organization encourages and facilitate collaborative opportunities	y/n	n/a
	Land Trust General Consultation			
	1. Keeps land trusts generally informed of public policy issues.	Does your organization keep land trusts generally informed of public policy issues (i.e. forwarding LTA updates, important news articles, legislative agendas, etc. to land trusts)?	y/n	WA and DA / newsletters/publications/announcements regarding current policy issues
	2. Facilitates the development of new and growing land trusts.	Does your organization facilitate the development of new and growing land trusts?	y/n	n/a
	3. Offers guidance for land trusts in transition.	Does your organization offer guidance for land trusts in transition?	y/n	n/a
	4. Offers guidance for land trusts considering a merger.	Does your organization offer guidance for land trusts considering a merger?	y/n	n/a

Code Key

DA = Document Analysis

WA = Web site Analysis

n/a = Additional methodology is not applicable

y/n/na = yes/no/not applicable

y/n = yes/no

Categories I = 0%, less than 10%, 10-25%, 25-50%, more than 50%

Categories II= less than 10%, 10-25%, 25-50%, more than 50%, not applicable

Chapter 5. Results

The purpose of this chapter is to discuss the results of the assessment with respect to how the service centers compared to the working model. The operationalization table (Table 4.1) illustrates how the survey results, document analysis and web site analysis are combined to make a final assessment of how service center operations compare to the working model components. This chapter provides the evidence found from each of the data collection techniques and presents an overall assessment (Yes, No, or Partial) regarding the degree of compliance with each working model component. This chapter organizes the results according to each working model component, presenting the survey results first, the other methodologies second, and lastly an overall assessment of compliance. The results for each working model component are also illustrated in tables throughout the chapter. A comprehensive table of results can be found in Appendix F and Table 6.1.

Organizational Structure Results

The first major category of the working model is organizational structure. It is important for service centers to build a strong organization in order to provide effective services to land trusts. The organizational components of the working model identify a variety of elements that help build a strong organizational structure under which service centers can operate. The categories regarding organizational structure include governance, mission, staff support, strategic planning, financial resources and continuing education. Tables throughout the chapter provide the survey results in addition to the overall assessment score for each component.

Governance Results

The first organizational structure component is governance. Literature suggests that there be a strong governing structure for managing a nonprofit organization (McClusky 2002). Therefore, the working model recommends that service centers have a formal board of directors to guide and govern the organization toward fulfilling its mission. Literature also recommends that there be a reasonable balance between constituents and other community leaders represented on the board (Bryson 2005, Chait et al 1994 and 2005). The working model proposes that the majority, but not all board members be land trust representatives. This encourages service center boards to have a strong representation of land trust organizations while maintaining a balance of other interested parties from the broader community. Table 5.1 provides the survey results and overall assessment regarding the governance components of the working model.

Table 5.1 Survey Results: Governance

Governance Working Model Elements	Evidence (n=22)	Assessment
1. The governing body is a formal Board of Directors.	64% Board 32% Advisory	YES
2. The majority, but not all Board Members are land trust representatives.	23% have a majority of land trust representatives	NO

Survey Results. Results show that only fourteen organizations are currently operating under a formal board of directors. However, seven of the remaining organizations are operating under an advisory group or steering committee that reports to a larger board of directors. There are only three organizations that do not have an established governing body, and these organizations are still in the development stages or are experiencing a period of transition.

Results for board composition show that only five service centers have a majority of land trust representatives on the board of directors or advisory group⁶¹. The remainder of organizations showed a variety of configurations regarding board composition. Five organizations have all board members representing land trusts and tend to be young organizations in the development stages, or organizations focused primarily on land trust services. Three organizations on the other hand have no land trust representation on their board and are characterized by a broad mission with land trust assistance as one small program. Organizations that operate primarily as a land trust also tend to have community members on the board as opposed to representatives from other land trusts in the region.

Five organizations have less than half of their board representing land trusts. These organizations typically provide a variety of services beyond the land trust community, but have an established land trust assistance program that is clearly represented on the board level.

Document and Web Site Analysis. Approximately half of the web sites provided a board list including each member’s occupation or business associations (Table 5.2). The analysis of board lists available was consistent with survey responses regarding the type of governing board and the number of land trust representatives.

Table 5.2 Results of Other Methodologies: Governance.

Governance Working Model Elements	Additional Methodology	Evidence (# sources with evidence / # sources reviewed)	Consistent with Survey
1. The governing body is a formal Board of Directors.	web sites	list of board members was available on most web sites (10/22)	YES
2. The majority, but not all Board Members are land trust representatives.	web sites		YES

⁶¹ Which ever governing body directly guides the land trust training and technical assistance program is the governing body that the data refers to.

Assessment. Although only a slight majority of service centers function under a formal board of directors (see Table 5.1), a majority of organizations have a formal governing body that clearly guides the training and technical assistance program and ultimately reports to a formal board of directors. Therefore, the working model component recommending a formal board of directors is currently being met by the majority of service centers.

The board composition appeared to be impacted by the structure of the organization, and the number of services or other activities that the organization is involved in. Unfortunately very few board compositions include a majority of land trust representatives with the remainder from outside interests. This weakness is likely due to the many organizations that have land trust services as only one part of their mission and a board representing interests other than land trust services. It could also be due to the organizations that focus only on land trust services and haven't expanded their board representation beyond land trusts. The majority of service centers are not currently working under a governing board that maintains a balance between land trust interests and the perspectives of the outside community, so they do not comply with the model at this time.

Mission Results

A well defined mission is considered to be a key component for organizational success (Chait 1993). As the needs of land trusts grow, it is important for organizations to have strong missions that keep them focused on their goals (Brewer 2003). The working model recommends that land trust training and technical assistance programs be the priority of the organization and be reflected in the mission statement. Table 5.3 provides the survey results regarding service centers' compliance with the working model components regarding mission statements.

Table 5.3. Survey Results: Mission

Mission Working Model Elements	Evidence (n=22)	Assessment
1. Primary purpose of organization is to provide land trust services.	73% responded Yes	PARTIAL
2. Land trust services are reflected in the organization's mission.	91% responded Yes	YES

Survey Results. Results show that sixteen of the twenty two organizations consider land trust assistance to be the primary purpose of their organization. Surveys reflect that several organizations consider land trust assistance to be one of multiple purposes. Other purposes include activities such as land acquisition projects, conservation easement transactions, and public policy efforts. Some of these organizations also provide services to a larger community beyond land trusts and have a broader focus outside the land trust community.

With the exception of two organizations, all service centers within the population include land trust services in their mission statement. One of these exceptions is an organization that has a more general mission statement, with land trust services as one program within their organization. The second exception for this component is an organization operating under the original mission statement that was established prior to the creation of their land trust services program. Although several organizations do not consider land trust services their primary purpose, as mentioned above, the majority of organizations still include land trust assistance in their mission statement.

Document and Web Site Analysis. As illustrated in Table 5.2, web sites for all organizations stated the mission and purpose of the organization. The web site analysis of mission statements and listed purposes of the organizations was consistent with survey results. Similar to the survey, several organizations did not consider land trust assistance a priority, but

nearly all organizations had land trust services reflected in their mission. One observation from reviewing web sites was that many mission statements were very broad or lengthy. They often referred to land trust services amongst many other activities. This is illustrated in the number of organizations that do not consider services a priority, but reflect it in the mission.

Table 5.4 Results of Other Methodologies: Mission

MISSION Working Model Elements	Source	Evidence (# sources with evidence / # sources reviewed)	Consistent with Survey
1. Primary purpose of organization is to provide land trust services.	Web sites	mission and/or purposes of organization were listed on site (22/22)	Yes
2. Land trust services are reflected in the organization's mission.	Web sites		

Assessment. Overall, many service centers (73%) consider land trust services the primary purpose of the organization. However, there are also several organizations that focus on a variety of activities in addition to land trust services. Therefore service centers only partially meet this working model component. The mission statements are often broad in nature, but clearly incorporate the concept of providing assistance to land trusts in order to build stronger organizations (see appendix C for list of mission statements). The reflection of land trust services in mission statements shows dedication to the effort, and reasonable assurance that the services will be provided on a long term basis. With a 91% positive response rate, service centers are considered to be in compliance with this working model component.

Strategic Planning Results

Literature emphasizes the importance of organizations using strategic planning to identify what they are, what they do, and why they do it (Bryson 2004, 6) in addition to prioritizing their goals and implementing a clear plan to achieve them (McCloughlin et al 1995, 1185). This is

particularly important for service centers to prioritize the variety of land trust needs and maximize limited resources.

Table 5.5 Survey Results: Strategic Planning

Strategic Planning Working Model Elements	Evidence (n=22)	Assessment
1. The organization has a strategic plan.	82%	YES
2. The strategic plan discusses land trust services.	82%	YES
3. The strategic plan is reviewed annually.	68%	PARTIAL
4. The strategic plan is being implemented.	82%	YES

Survey Results. Results indicate that the majority of organizations have strategic plans. Those that do not have strategic plans are using an annual plan or are young organizations that are not established enough to develop or implement a strategic plan. Organizations that are unlikely to implement the plan is one of the scenarios in which Bryson (2004, 332) claims it is not a good idea to develop a strategic plan. As illustrated in Table 5.5, all organizations with a strategic plan include land trust services within the plan and are implementing the plan. The weakness in this working model component is the annual review of the strategic plan. There are several organizations that do not review their strategic plan on an annual basis.

Document and Web Site Analysis. As shown in Table 5.6, five strategic plans were provided by organizations for review. All submitted strategic plans clearly identified land trust services as one of the main goals of the organization, and particular activities to address land trust needs were discussed. The greatest challenge with this working model component was ensuring that the strategic plan was being implemented. Several program documents were submitted that listed activities which related directly to the goals of the strategic plan. For instance, the most common activity was providing training for land trusts. The conference

materials were a clear demonstration of a training event. The documents that were reviewed were consistent with survey responses. In some cases, document and web site evidence confirming the implementation of the strategic plan were analyzed under the assumption that events occurred as advertised. The annual review, unless specifically noted in the strategic plan, was also difficult to detect.

Table 5.6 Results of Other Methodologies: Strategic Planning

Strategic Planning Working Model Elements	Resource	Evidence (# sources with evidence / # sources reviewed)	Consistent with Survey Responses
1. The organization has a strategic plan.	Strategic Plan	Several strategic plans were submitted (5/5)	Yes
2. The strategic plan discusses land trust services.	Strategic Plan	strategic plans clearly discussed the land trust services provided by the organizations (5/5)	Yes
3. The strategic plan is reviewed annually.	Strategic Plan	Some plans showed evidence of annual review, including annual strategic planning meetings (3/5)	Yes
4. The strategic plan is being implemented.	Program materials	programs/trainings offered to land trusts reflect the goals identified in the strategic plan (5/5)	Yes

Assessment. Results indicate that all applicable organizations have a strategic plan that includes land trust services and is being implemented. Results in this area should be analyzed with caution considering the difficulty in confirming that strategic plans are truly being followed and implemented. However, document analysis did support some of the activities identified in the strategic plans. The only weakness found in this working model component is the annual review of the strategic plan to ensure that priorities are appropriate and work plans for implementation are reasonable. The assessment rating is partial for this particular component since several organizations do not review their plan on an annual basis. Such an annual review is important for service centers to adjust to changes in the land trust field.

Financial Resources Results

Service centers are known to secure funding in a variety of ways (Roe 2002). This strategy of diversity and creativity in building financial support is also emphasized by Ingram (2003, 6-7). Membership programs with land trust supporters and other community investors is one way to build a strong yet diverse membership base. Managing the financial resources of an organization is also an important component of organizational structure to ensure that resources are distributed appropriately. The working model recommends that a strong but diverse membership be established and adequate funds be dedicated to the operations of land trust services.

Table 5.7 Survey Results: Financial Resources

Financial Resources Working Model Elements	Evidence (n=22)	Assessment
1. Majority of land trusts are members.	64%	PARTIAL
2. More than one type of membership.	50%	NO
3. Benefits are provided to members.	82%	YES
4. No one land trust contributes significantly more.	100%	YES
5. More than 25% of the budget is dedicated to land trust services.	77%	PARTIAL
6. More than 10% is dedicated to general administration for land trust services.	27%	NO

Survey Results. Financial resources are difficult to examine when the organizations are functioning under a variety of structures and receiving financial support from a number of sources. However, it is clear that service centers' greatest strength is establishing a fair dues structure and providing benefits to members.

Membership. Results indicate that service centers establish a reasonable sliding scale or flat rate for dues in order to treat land trusts equally and prevent any one land trust from

contributing unreasonably more than others. Organizations without land trust members are not member based organizations, are just starting to build their membership, or are land trust organizations that do not have other land trusts as members.

The second strength within the membership component of the working model is member benefits. Results show that all service centers provide a variety of benefits, including newsletters, email updates, discounts on conferences, and access to other resources such as sample documents and internet listserves.

Unfortunately, one weakness of membership is the diversity of members. Most but not all organizations have support from the majority of land trusts in their region, and only 50% of organizations expand their membership to other individuals, companies, and organizations to diversify their membership.

Finances. The distribution of financial resources was difficult to examine due to the variety of budget structures. Results indicate that many of the organizations contribute more than 25% of their budget to land trust services, but few dedicate adequate administrative resources to deliver the services. The challenge with this working model component is defining “land trust services” and what type of “budget” the survey response is based upon. Some service centers provide services beyond the training and technical assistance program examined in this study. Regardless, there appears to be a reasonable amount of the budget set aside for land trust services of sorts.

Another weakness of these results is the definition of budget. For organizations that focus only on land trust services, 100% of their budget is dedicated to services. On the other hand, some service centers are programs within a larger organization, and it is not clear whether services are mixed in with the overall budget or is given a specific program budget. It is difficult

to mitigate the variety of budget structures and definitions of land trust services in the survey. Further investigation in this area would be helpful.

Document and Web Site Analysis. Additional methodologies were most effective in analyzing membership programs. Web sites often listed the number of land trusts that were members, in addition to the total list of land trusts in their region. Membership information regarding the different categories and dues structure was also available. Similar to survey comments, membership dues appeared to be on a sliding scale according to operating budget, or a flat fee with different categories. As shown in Table 5.8, all of the membership information found on the web sites was consistent with the survey responses.

Table 5.8 Results of Other Methodologies: Financial Resources

Financial Resources Working Model Elements	Source	Evidence (# sources with evidence / # sources reviewed)	Consistent with Survey
1. Majority of land trusts are members.	web sites	members were listed on some web sites (9/22)	Yes
2. More than one type of membership.	web sites	a few membership forms and information were available on the web site (3/22)	Yes
3. Benefits are provided to members.	web sites	benefits were listed on membership forms or in other membership information (2/22)	Yes
4. No one land trust contributes significantly more.	web sites	sliding scale for membership was provided on some sites. (3/22)	Yes
5. More than 25% of the budget is dedicated to land trust services.	None	n/a	n/a
6. More than 10% of budget is dedicated to general administration for land trust services.	None	n/a	n/a

Assessment. Building land trust support and providing membership benefits are important components in building support from the ground up, and are a strength of service centers today. However, the membership base for many service centers is being limited to land

trusts. Without expanding their membership program, a service center limits the amount of community support and awareness that can be developed. Land trust membership is a good place for organizations to start, but getting other community members involved leads to a greater awareness and diversity of revenue for the organization. The analysis of results leads to an assessment rating of full compliance with respect to member benefits, but illustrates a lack of compliance regarding membership diversity (see Table 5.7). Those organizations without members often clarified in their survey responses that benefits listed in the survey were provided to the general public in place of members.

Land trust support was given a partial compliance rating since many organizations did not have the support of the majority of land trusts in their region. Although some organizations are non-membership organizations, there did not appear to be other avenues for land trusts to financially support the organization. One example of an alternative is illustrated by service centers that provide technical support for Councils of land trusts. In this case, land trusts financially support the Council, and receive services from the service center in return. This scenario was the case for a few service centers and was acceptable for the working model. Further investigation may increase this rating to full compliance if it was proven that financial support from land trusts was received through a mechanism other than membership.

As mentioned earlier, it is difficult to analyze the distribution of financial resources given the diversity of organizational structures. However, it appears that most organizations dedicate a reasonable amount of resources to land trust services, but very little administrative support is provided. Again, it is unclear how the percentages were calculated by respondents, but comments from the survey reflect that most directors are concerned about having adequate

financial support to deliver services. Service centers received a partial compliance for budget allocation to land trust services, but no compliance for administrative support.

Staff Support Results

Many service centers are funded by a strong land trust or state agency that dedicates a percentage of staff to providing support for land trust services (Roe 2002). In discussions amongst service center directors, staff support for delivering services is a common topic of concern. Service centers will likely need more than one full time staff person in order to provide all of the services needed by land trusts, but the working model suggests the equivalent of one full time staff person in order to recommend a reasonable standard for today.

Table 5.9 Survey Results: Staff Support

Staff Support Working Model Elements	Evidence (n=22)	Assessment
1. There is at least one full-time staff person dedicated to land trust services.	73%	PARTIAL

Survey Results. Results show that the majority but not all organizations have the equivalent of at least one staff member dedicated to land trust services. Many organizations have part time staff or multiple staff members each dedicating a small percentage of their time to land trust services. The administrative support associated with land trust services appeared to be disjointed and handled on a needs basis as opposed to having a clearly defined support system for delivering assistance to land trusts.

Document and Web Site Analysis. A list of staff members were often listed on web sites, but it was not clear as to the amount of time each staff member, if any, spent on providing land trust services. Therefore, document and web site analysis was not applicable for this working model component.

Table 5.10 Results of Other Methodologies: Staff Support

Staff Support Working Model Elements	Additional Methodology	Evidence (# sources with evidence / # sources reviewed)	Consistent with Survey
1. There is at least one full-time staff person dedicated to land trust services.	web sites	staff were often listed on the site, but full time status or dedication to land trust services was not able to be determined	n/a

Assessment. Although the majority of organizations did have at least one full time staff member dedicated to land trust services, the assessment received a partial rating due to the fact that staff support was often focused on a variety of tasks, in addition to land trust services. Results show that some of the basic staff needs are being met, but the ability for quality services to be delivered by the staff support systems is questionable. Administrative support was often supported by one person with an unreasonable work load, or several staff members trying to put a small percentage of their time toward the program. It didn't seem as though there was a sustainable system of staff support for most organizations.

Continuing Education Results

With the ever-changing land trust community, from policy to public relations and legal concerns, service centers are a clearing house for spreading current news throughout the land trust community. Keeping board members, staff, and volunteers aware of new changes in the land trust field allows land trusts to stay up to date. The working model recommends that a service center representative attend a land trust training at least once a year. In order to spread the information throughout the organization, and ultimately throughout the land trust community, the working model recommends that the information be presented other board and staff members following the training session.

Table 5.11 Survey Results: Continuing Education

Continuing Education Working Model Elements	Evidence (n=22)	Assessment
1. At least one Board/Staff member/Volunteer or Intern is sent to a land-trust focused training each year	100%	YES
2. Information from conferences is formally presented to other board/staff members.	55%	NO

Survey Results. Results show continuing education as one of the strongest components of service centers today. All service centers send at least one board or staff member to a land trust training. Unfortunately, the information from the training event is not often presented to other board or staff members. Many of the surveys included comments supporting the informal transfer of information, but very few formal presentations were found. One concern that was identified in the survey comments was the lack of training for building stronger service center organizations. Service center staff have ample opportunity to learn about the land trust business, but are rarely given the opportunity to learn how they can make their own organization stronger and more effective.

Document and Web site Analysis. The attendance list for the most recent Land Trust Rally included representatives from all service centers. This supports strong results for continuing education, considering the national land trust rally is one of the most in depth and up to date training opportunities available. It is also an expensive conference and shows the dedication service centers have for attending important training opportunities.

Table 5.12 Results of Other Methodologies: Continuing Education.

Continuing Education Working Model Elements	Source	Evidence (# sources with evidence / # sources reviewed)	Consistent with Survey
1. At least one Board/Staff member/Volunteer or Intern is sent to a land-trust focused training each year	Attendance List for LTA Rally	Staff or board member attendance at the National Land Trust Rally in October 2005 (22/22)	Yes
2. Information from conferences is formally presented to other board/staff members.	none	n/a	n/a

Assessment. The attendance of service center representatives at land trust trainings is in full compliance with the working model. In addition to attending Rally, nearly all service center representatives involved in this study attended a meeting dedicated to bringing service centers together from across the country. Their interest in this study and participation in the service center meeting showed dedication to improving their effectiveness by staying educated on current issues. Hopefully there will be opportunities in the future for service center representatives to not only learn about the land trust business but also how to make their service center organizations stronger.

Land Trust Services Results

Land Trust Training Results

Land trust training is considered a priority for land trusts in many regions of the country.⁶² The Land Trust Alliance is developing a curriculum that focuses on the indicator practices for accreditation, but plans to share the responsibility of delivering the curriculum with regional service centers in order to be successful. Training opportunities are the most direct way to educate land trusts on current issues, how to implement *Standards and Practices*, and how to

⁶² Land Trust Needs Assessment reports in South Carolina, Georgia, Ohio, Indiana, West Virginia and the Southern Appalachian region all reflect the need for training.

build organizational capacity. The working model suggests that service centers coordinate at least one training workshop per year and inform land trusts of other outside opportunities as well.

Table 5.13 Survey Results: Land Trust Training

Land Trust Training Working Model Elements	Evidence (n=22)	Assessment
1. Organizes at least one training per year.	95% (average of 4 half day trainings and 1 multi- day training)	Yes
2. Organization informs land trusts of outside training opportunities	86%	Yes

Survey Results. Results indicate that twenty one of the twenty two service centers surveyed provide a training opportunity each year. The majority of training opportunities are an annual conference that is at least a full day event. The service centers averaged four half day trainings per year and one multi-day training per year. The only service center not involved in a training event is an organization that is primarily focused on public policy issues as opposed to training or technical assistance. Results also show that service centers inform land trusts of other educational opportunities. This allows land trusts to seek guidance beyond the service centers expertise or capacity to provide training. There are several nonprofit management programs throughout the country that are helpful for land trusts. In some cases, land trusts themselves may also offer training opportunities that other land trust staff can participate in. Results show that training opportunities may not ever be completely fulfilled, but service centers are certainly providing at least one training opportunity per year for their regional land trusts.

Document and Web Site Analysis. The web sites were a great resource for learning about the annual conferences coordinated by the service center, upcoming workshops, and other

educational events. Many web sites had an events page with detailed information about past conferences and upcoming conferences. Documents from the conferences were also available on some sites. Several of the service centers provided information about their training events on their web sites, and the web site was consistent with survey responses.

Table 5.14 Results of Other Methodologies: Land Trust Training

Land Trust Training Working Model Elements	Source	Evidence (# sources with evidence / # sources reviewed)	Consistent with Survey
1. Organizes at least one training per year.	web site	conference programs and announcements were on site (9/22)	Yes
2. Organization informs land trusts of outside training opportunities	web site	training opportunities and outside conferences were often listed on web sites (8/22)	Yes

Assessment. Organizations seem to be focusing a great deal of energy in providing training events for land trusts. This is an excellent way to get important messages out to a large number of land trusts in addition to other interested persons. Nearly all service centers provide one or more training opportunities for land trusts, and clearly meet the working model expectation. In addition, the majority of service centers provide information about other training opportunities in their newsletters, on their web site, or via a listserve. This is a simple way to keep land trusts actively educating themselves and staying on the cutting edge of land conservation. Service centers scored high in this area of the working model, complying with both elements associated with land trust training.

Land Trust Technical Assistance Results

In light of accreditation and the new *Standards and Practices*, many land trusts need to update informational materials, revise policies and procedures, and update legal documents. It is helpful for land trusts to have example policies and documents to assist them with their own operations and document revisions. Service centers can act as a clearinghouse for providing land

trusts with sample documents, professional references, and up to date informative brochures to assist them with organizational development.

The first expectation of the working model is for service centers to keep land trusts up to date on policy issues so that they can make changes in their own organizations accordingly. The working model also recommends that organizations produce information that can be shared with landowners, provide examples of documents, and provide names of professional resources. Providing an inventory of land protection projects is also included in technical assistance, but is a new and growing phenomenon. Given the right technology, having a statewide database can be helpful in receiving funding on a state level and can also encourage land trusts to conserve land strategically on a regional scale.

Table 5.15 Survey Results: Land Trust Technical Assistance

Land Trust Technical Assistance Working Model Elements	Evidence (n=22)	Assessment
1. Keeps land trusts generally informed of public policy issues.	95%	YES
2. Provides materials that can be distributed to landowners.	77%	YES
3. Provides examples of documents, policies and procedures upon request.	91%	YES
4. Provides names/references of professional services.	86%	YES
5. Provides an inventory/database of land projects in the service area.	36%	NO

Survey Results. Results show that service centers provide strong technical assistance in several areas. All but one organization keeps land trusts up to date on current policy issues. The program that does not provide this service is associated with a larger organization that fills this responsibility. Twenty of the twenty two service centers provide examples of policies and procedures for land trusts to use and nineteen organizations provide lists of references for land trusts that need professional guidance.

A slightly smaller majority produces materials that can be shared with landowners. A common publication is a landowner guide to conservation options or information about tax benefits, legislation or public policies regarding conservation. Very few organizations keep an inventory of projects, and the format for these databases was not explored in this study. Some landowners prefer that their names or property location remain confidential, so this can be challenging in some areas. Some service centers are working to establish a GIS based system of tracking conservation projects in order to map the protected properties across the state. Again, confidentiality can sometimes hinder this effort.

Document and Web site Analysis. Newsletters and web sites both provide information about policy updates and federal issues revolving around land trust work. Newsletter articles discussed Congressional hearings, *Washington Post* articles, and the overall scrutiny of land trusts on a federal level. State wide legislation and policies were also discussed, including new ballot measures and funding opportunities. Many of the web sites provided general information about conservation easements, land trusts, conservation options, and benefits of land conservation. This information represented resources for landowners interested in learning more about land trusts. Links to the Land Trust Alliance web site were also common, providing access to more detailed publications about land trusts. Several organizations posted an example of a conservation easement document on their web site, but only a few provided a list of professional resources.

Table 5.16 Results of Other Methodologies: Land Trust Technical Assistance

Land Trust Technical Assistance Working Model Elements	Additional Methodology	Evidence (# sources with evidence / # sources reviewed)	Consistent with Survey
1. Keeps land trusts generally informed of public policy issues.	web site, newsletter, publications	newsletters (10/10) and web sites (5/22) provided a variety of updates regarding public policy issues and federal concerns regarding conservation easements	Yes

2. Provides materials that can be distributed to landowners.	Web site, organizational materials and publications	Web site(7/22), publications and materials were provided (12/12), and contained educational information relative to landowner involvement with land trusts	Yes
3. Provides examples of documents, policies and procedures upon request.	Web sites	some web sites included examples of conservation easements and other documents for organizations to review (6/22)	Yes
4. Provides names/references of professional services.	web site	a few lists of legal or other professional services were available (2/22)	Yes
5. Provides an inventory/database of land projects in the service area.	none	n/a	n/a

Assessment. Overall, service centers provide a variety of technical assistance. Evidence shows that the strongest areas of technical assistance are providing examples of documents and referring land trusts to professional resources. These two elements are important for land trusts to efficiently resolve problems and update their policies and documents to meet new expectations. Service centers effectively meet these two elements of the working model.

Organizations partially comply with the element recommending organizations provide materials that can be shared with landowners. Only seventeen organizations are in full compliance, and some of their publications appear to be accessed through the Land Trust Alliance, which have a national focus and are not always free of charge. Although LTA has excellent information, informative brochures with a more regional focus can be very helpful to landowners and local land trusts. The publications that were provided for document analysis were excellent resources for information on land conservation and regional issues.

Service centers are not in compliance with the last component regarding a database of land projects, but it appears to be a growing interest for organizations. Further examination of how the databases are maintained and how they have benefited the land trust community would

be helpful for other service centers. A database of land protection projects appears to be a great resource if confidentiality concerns are addressed.

Land Trust Networking/Collaboration Results

As Roe (2002) discusses in his report, collaborative efforts amongst land trusts have developed into a variety of forms with a number of purposes. Service centers often grow out of these collaborative efforts or are the facilitator of collaborative efforts. By providing an opportunity for land trusts to network with one another, ideas can be shared, people can learn from the experience of others, and group efforts can be made to accomplish sizable tasks. The working model focuses on providing such networking efforts on a professional and social level in order to encourage open communication among land trusts.

Table 5.17 Survey Results: Land Trust Networking/Collaboration

Land Trust Collaboration/Networking Working Model Elements	Evidence	Assessment
1. Provides a directory of land trusts across the state/region.	77%	YES
2. Provides opportunities for land trusts to network.	100%	YES
3. Provides opportunities for land trusts to share information and personal experiences.	100%	YES
4. Encourages and facilitates collaborative opportunities.	91%	YES

Survey Results. Results indicate that organizations focus a great deal of attention on providing networking opportunities for land trusts. Service centers will organize events solely for the purpose of networking, or will incorporate networking or socials into other events such as conferences and workshops. Most organizations provide a directory of land trusts in the area to allow for organizations to contact one another easily.

Document and Web Site Analysis. Web sites supported the survey responses related to land trust directories. Many of the directories were posted on the web site. For those organizations without a full directory, a simple list of land trusts in the state or a link to LTA’s list of land trusts in each state was available. Several documents associated with conferences included sessions for land trust networking and social interaction.

Table 5.18 Results of Other Methodologies: Land Trust Networking/Collaboration

Land Trust Networking/Collaboration Working Model Elements	Source	Evidence (# sources with evidence / # sources reviewed)	Consistent with Survey
1. Provides a directory of land trusts across the state/region.	web site	most land trust directories claimed in the survey were provided on the web site (12/22)	Yes
2. Provides opportunities for land trusts to network.	conference programs	conference programs included time set aside especially for networking opportunities (3/3)	Yes
3. Provides opportunities for land trusts to share information and personal experiences.	conference programs		Yes
4. Encourages and facilitates collaborative opportunities.	materials	some organizations discuss collaborative projects they are involved with and grants they have received for collaborative efforts	Yes

Assessment. Most service centers maintain a land trust directory, but those who rely on the LTA list of land trusts should consider maintaining their own directory that can be updated on a regular basis as changes occur such as staff or office location. This will assist LTA in keeping an up to date database as well. Overall, the majority of organizations does provide this service, and therefore comply with the working model. One weakness of the survey is that it is not possible to determine whether the directory is complete and up to date.

Service centers scored very well in providing opportunities for networking and collaboration. Some organizations are more involved with collaborative efforts, but all service

centers provide the networking opportunities that can lead to cooperative efforts if appropriate. Maintaining open communication among land trusts provides a great opportunity for land trusts to work together, share experiences, and grow together on a regional level.

Land Trust General Consultation Results

As land trusts grow and build their capacity to meet the national *Standards and Practices*, several transitions may occur that require general consultation from a service center. Some land trusts are growing from an all volunteer grassroots organization, others are hiring staff for the first time, and a few regions are experiencing the need for land trust mergers. The working model addresses each of these transitional stages that might require assistance.

Table 5.19 Survey Results: Land Trust General Consultation

Land Trust General Consultation Working Model Elements	Evidence (n=22)	Assessment
1. Facilitates the development of new and growing land trusts.	91%	YES
2. Offers guidance for land trusts in transition.	77%	YES
3. Offers guidance for land trusts considering a merger.	77%	YES

Survey Results. Providing general consultation to land trusts is a service provided by most service centers. All but one organization provides consultation to new and growing land trusts, and the majority of organizations provide assistance to land trusts in transition or considering merger.

Document and Web Site Analysis. Additional methodologies were not applicable to this portion of the working model.

Assessment . Service centers received a full compliance rating for providing consultation to new and growing land trusts and land trusts considering merger. A high assessment rating

was given for all categories because survey comments suggested that each region is dealing with different types of transitions. Surveys suggested that consultation in all areas was available, but only certain situations were applicable to their service area. Several service centers noted the focus of growing existing land trusts more than starting new land trusts.

Many areas of the country are focusing on strengthening the land trusts already established and only starting new land trusts when absolutely necessary. For instance, in the mountains of North Carolina there are several land trusts in a small area, but in Texas there are many areas of the state that do not have an active land trust. All areas of the country are working to strengthen existing land trusts, but some regions are focusing on merging land trusts and others are still creating land trusts.

Chapter 6. Conclusions and Recommendations

The purpose of this study is to develop a working model, assess training and technical assistance programs using the working model, and provide recommendations for how to enhance the current programs. In conclusion, the purpose of this chapter is to address each of the original purposes of the study as follows: (1) review the strengths and weaknesses of the working model approach; (2) summarize the conclusions of the assessment; and (3) provide recommendations to clarify, improve, and unify the training and technical assistance programs across the nation.

Strengths and Weaknesses of Study

Overall, the study was successful in developing an effective working model and completing an assessment of training and technical assistance programs. However, due to the diversity of organizations involved in the study, there were several challenges and weaknesses worth noting. This section discusses some of the strengths and weaknesses of developing the working model, defining the population, using a variety of methodologies, and analyzing the

data. Recommendations for future research or adjustments to the existing study are also discussed.

Working Model. The development of the working model was a challenge due to a limited amount of research on service centers. Fortunately, resources regarding nonprofit management in general were very applicable to the service center population. The working model provided an effective tool to assess the organizations in a precise and organized manner, without knowing what the results would reveal. It provided a baseline of comparison that was achievable for a variety of organizations. Overall it was a very effective tool to assess a group of organizations that were not well understood and were each very unique.

Population. Defining the population was challenging without a clear definition of a service center, but once the appropriate “type” of organization for this study was recognized⁶³, it was fairly clear as to which organizations qualified. A potential weakness in the population for this research is that organizations providing informal land trust services (and not intending to become service centers), could not be included. Although it would have made the results more complete to include these organizations as participants, the assessment was based on established training and technical assistance programs, and needed to compare apples to apples.

There are a number of organizations that provide training and technical assistance informally or on an as needed basis. A study examining these organizations would be helpful in recognizing the impact they are having on the land trust community and identifying what niche of services and collaborative efforts they are filling. There are also a great deal of private consulting firms and nonprofit organizations that provide training as well. Although consultants’ fees for service are often too high for young land trusts to afford, this is another source of assistance that would be worth investigating.

⁶³ Organizations providing structured training and technical assistance to land trusts on a regular basis.

The population of this study was effective in representing the variety of service center structures, locations, and sizes operating today. One weakness was that a few organizations that qualified did not respond to the survey. It is unlikely that the small number of organizations that did not participate significantly impacted the data. These organizations were either just starting to provide services or were a larger organization that did not consider land trust services a major priority.

Overall, the high participation rate was one of the greatest strengths of this study. In many ways, the population was proven successful simply because nearly every applicable service center representative who attended the service center meeting at the national Land Trust Rally completed the survey.

Methodology. The survey was an excellent tool to gather specific information while also leaving room for explanation. It allowed participants to answer questions on their own time and at their own pace. Using multiple sources of evidence was an effective strategy for completing a thorough assessment from a variety of perspectives. The document analysis and web site analysis clarified some of the more complicated components of the organizational operations or services provided.

Due to the complexity of the open ended questions and the variety of organizations responding to the same questions, the survey methodology was also challenging. The open ended questions and explanations complicated the results in terms of having a yes or no answer to the working model. Due to the “unknown” nature of service centers, it was essential to understand all of the exceptions and details, but these open responses sometimes made it difficult to identify a clear answer. However, the details were very helpful in making adjustments to survey responses and developing an accurate overall assessment. For instance, although only a

small majority of organizations have a board of directors, the advisory boards played an equivalent role in many cases, so that component was rated with a Yes instead of Partial. The overall assessment ratings allowed for adjustment to the survey according to the reality of the situation.

Analysis. Overall, the methodologies provided an effective tool for analyzing the organizations according to the working model. The survey provided structured answers, and the additional methodologies contributed additional clarification and support. The greatest weakness with the survey analysis was evaluating financial resources because each organization handles and reports their financial resources differently. The questions were general enough to make a reasonable judgment of how finances were managed, but the details of how each organization broke down their finances was not clear from the survey. A more detailed section on finances would be helpful in the future to clarify where the numbers were coming from exactly, and be able to ensure that numbers are compared fairly. With more detailed information, a more in depth analysis of the percentages provided in the survey could be completed.

It was also difficult at times to identify if organizations were responding from a program perspective or larger organizational perspective in cases where training and technical assistance services were associated with a larger entity. Many organizations clarified which level of the organization they were referring to in their answers, but it was difficult to manage this discrepancy in such a large survey. The methodologies and analysis were effective in assessing the organizations, but challenging due to the variety of questions asked and the diversity of organizations responding.

Conclusions of Assessment

Overall, results indicated that service centers have strengths and weakness throughout all elements of the working model. With the exception of strong land trust training efforts, no specific categories were inherently strong or weak. Some of the factors influencing the ability to comply with the working model included how the service center was structured, the characteristics of their service area, and the age of the organization.

In general, service centers illustrated strong mission statements, effective governing bodies, strategic visions, and well educated executives. Some of the weaknesses include lack of administrative support, an imbalance of land trust and community representation within the governing body, limited financial resources, and limited reviews of strategic plans.

The services provided most regularly by service centers included annual trainings or conferences, networking opportunities, examples of documents, awareness of public policy issues, and support for growing land trusts. Areas of service that need to be improved include a database of land protection projects, producing regional based informative brochures for general use, and diversity of membership. Table 6.1 provides an overall assessment of the strengths and weaknesses of service centers according to the working model.

Table 6.1 Summary of Overall Assessment

YES: Overall, the service centers were found to be operating consistently with the following working model components.

Organizational Structure Components

- The governing body is a formal Board of Directors.
- Land trust services are reflected in the organization’s mission.
- Benefits are provided to members.
- Land trusts contribute equally.
- At least one Board/Staff member/Volunteer or Intern is sent to a land-trust focused training each year

Land Trust Services Components

- Organizes at least one training per year.
- Organization informs land trusts of outside training opportunities
- Provides examples of documents, policies and procedures upon request.
- Provides names/references of professional services.
- Provides opportunities for land trusts to network.
- Provides opportunities for land trusts to share information and personal experiences.
- Encourages and facilitates collaborative opportunities.
- Keeps land trusts generally informed of public policy issues.
- Facilitates the development of new and growing land trusts.

PARTIAL: Overall, the service centers were only partially in compliance with the following working model components

Organizational Structure Components

- Primary purpose of organization is to provide land trust services.
- The organization has a strategic plan.
- The strategic plan discusses land trust services.
- The strategic plan is being implemented.
- Majority of land trusts are members.
- More than 25% of the budget is dedicated to land trust services.
- There is at least one full-time staff person dedicated to land trust services.

Land Trust Services Components

- Provides materials that can be distributed to landowners.
- Provides a directory of land trusts across the state/region.
- Offers guidance for land trusts in transition.
- Offers guidance for land trusts considering a merger.

NO: Overall, the service centers did not show significant evidence of compliance with the following working model components

Organizational Structure Components

- The majority, but not all Board Members are land trust representatives.
- The strategic plan is reviewed annually.
- More than one type of membership.
- More than 10% is dedicated to general administration for land trust services.
- Information from conferences is formally presented to other board/staff members.

Land Trust Services Components

- Provides an inventory/database of land projects in the service area.

Recommendations

The three major challenges this study was designed to address include; (1) the confusion about what the definition of a service center is or should be, (2) not knowing how effective the current programs are, and (3) deciding how to develop a more unified system for providing services to land trusts. The recommendations in this section address each of these challenges by proposing a definition for service centers, providing recommendations for improvement according to the working model, and recommending ways in which service centers can work together and with LTA to build a more comprehensive delivery system for land trust services.

Definition of a Service Center. The categorical nature of the assessment provided a descriptive element to the study that was not specifically intended. Babbie (2004, 213) mentions that surveys are useful in describing the characteristics of a population. Due to the variety of service centers, the categories of the practical ideal type acted as a “sorting bin”⁶⁴ in identifying organizations with common characteristics. Sorting through the variety of service centers and finding common denominators surprisingly served the distinct purpose (Shields 1998, 213) of defining service centers. Although it is not the focus of this study, the descriptive component of the study shed light on the types of organizations being assessed by the working model.

The two categories of organizational structure and land trust services lend themselves to identifying how the structure of the program and the services provided differed throughout the population. It brought order to the chaos and facilitated the recognition of three distinct types of service centers. As a result, the definition of a service center is proposed as a result of this study.

The first major distinction, identified in the process of establishing the population of this study, is whether or not an organization provides land trust services on a regular basis to land trusts in a given state or region. Many organizations can provide services, but fewer

⁶⁴ Shields (1998, 213) references Dewey’s view of categorization as sorting bins.

organizations provide formal and organized services on a regular basis. The organizations that fall into the category of informal services would include many of the networks, coalitions, alliances, and other collaborative efforts or large land trusts that provide guidance to smaller land trusts on an as needed basis. “Service centers” as proposed below, have an organized program, built to provide land trust services on a regular basis.

The second distinction is the structure under which services are provided. Results indicated three major categories of service providing techniques. The first is a “*service center organization*” which is a 501(c)(3) organization that considers land trust services to be their primary if not sole purpose. The second category is a “*service center program*” which is a program within a larger organization that was developed for the purpose of providing services to land trusts, has funding and administrative support dedicated to it, has an advisory board or committee, and reports to a larger board of directors. The third category is a “*Land Trust Alliance regional service center*” which provides guidance to the service centers and assists with land trust services unable to be met by service centers. Appendix A provides a more detailed explanation of the three types of service centers identified in the study. Table 6.2 illustrates how organizations included in this study may fit into the three categories of service centers.

The previous challenges in defining a service center appear to be associated with the variety of structures used to provide services. This study revealed that all of the training and technical assistance programs are being delivered by a service center, but some service centers are an organization, and others are simply a program developed by an existing organization serving multiple conservation purposes.

This study provided the opportunity to define service centers based on their commitment to offering land trust services on a regular basis and in an organized manner, and clarified that the definition should recognize both organizations and programs as acceptable “service centers”.

As a result of this study, the following definition of a service center is proposed:

***Service Center:** An organization or program within a conservation organization whose primary purpose is to provide structured land trust training, technical assistance and other services on a regular basis to enhance the organizational capacity and success of land trust organizations within a given state or region.*

Table 6.2 Three Types of Service Centers

Service Center Organizations	States included in each service area
Appalachia Ohio Alliance ⁶⁵	Ohio
Compact of Cape Cod Conservation Trusts	Massachusetts
Colorado Coalition of Land Trusts	Colorado
Gathering Waters Conservancy	Wisconsin
Heart of the Lakes	Michigan
Indiana Land Protection Alliance	Indiana
Massachusetts Land Trust Coalition	Massachusetts
Pennsylvania Land Trust Alliance	Pennsylvania
Rhode Island Land Trust Council	Rhode Island
California Council of Land Trusts	California
Texas Land Trust Council	Texas
Service Center Programs	Associated/Support Organization
Center for Conservation Assistance	Society for the Protection of New Hampshire Forests
Conservation Trust for North Carolina	Conservation Trust for North Carolina (land trust)
Connecticut Land Trust Service Bureau	The Nature Conservancy – Connecticut Chapter
Georgia Land Trust Service Center	Georgia Environmental Policy Institute
Maine Land Trust Network	Maine Coast Heritage Trust
Maryland Environmental Trust	Maryland Department of Natural Resources
New Jersey Conservation Foundation	New Jersey Conservation Foundation (land trust)
Putnam Conservation Institute	The Trustees of Reservations
Land Trust Alliance Regional Programs	States included in each region
Southeast Program	FL, GA, AL, MS, SC, NC, VA, KY
Midwest Program	MI, OH, IN, IL WI, MN, IA, MO, KS, NE, ND, SD
Northeast Program	NY, VT, NH, MA, RI, ME, RI

⁶⁵ Note that Appalachia Ohio Alliance is in the initial stages of development, and is currently receiving support from the Land Trust Alliance.

Recommendations and Best Practices According to Working Model. Table 6.3 provides recommended actions for how service centers can more effectively comply with the working model components given their variety of structures and priorities. The table provides the working model component, the overall assessment rating, and recommendations regarding how service centers can better implement each working model component. Examples of best practices are also noted on the far right side of the table. The examples of best practices are not intended to rate the quality of the service center or identify the only organizations meeting the full expectation of the working model. The best practices listed are examples of organizations that were found to be clear and effective examples of how an organization can implement the working model components. Several appendices are referred to in the table and provide an additional reference for examples and ideas.

Table 6.3 Recommendations and Best Practices According to Working Model

Working Model	Assessment	Comments	Action Steps	Examples of Best Practices
Governance				
1. The governing body is a formal Board of Directors.	Yes	Most service centers have a governing board or advisory group that helps guide the organization in providing quality services to land trusts. If the service center is functioning under a larger organization, it is important that the advisory group be in close communication with the board, in order to keep the board informed and provide quality land trust services.	<p>1. Review your governance structure.</p> <p>A) Are land trust services being reviewed and discussed on a regular basis, or is it getting buried under larger issues?</p> <p>B) Is your organization/program receiving guidance from the board on how to improve your land trust services program?</p> <p>C) If there is an advisory group overseeing the land trust assistance program, is the advisory group in communication with the board?</p>	<p><u>Diverse Board of Directors:</u></p> <p>1. CO Coalition of Land Trusts</p> <p>2. TX Land Trust Council</p> <p>3. PA Land Trust Association</p> <p><u>Advisory Board and Board of Directors:</u> 1. Maine Land Trust Network (advisory)</p> <p>Maine Coast Heritage Trust (Directors).</p>
2. The majority, but not all Board Members are land trust representatives.	No	Service centers have a variety of board compositions. Although every board will have different needs, it is important for land trusts to be well represented in order to voice the needs of land trusts. It is also important to have community representatives outside of the land trust world to maintain a diversity of opinions, a place in the greater community, and a greater skill set. Regardless of how the board structure is organized, it may be helpful to apply the composition recommended in this working model to the group of individuals (board/advisory) that are most heavily involved in making decisions about land trust services.	<p>1. Develop a matrix that identifies who is on your board, their background, skills, etc.</p> <p>2. Identify skills and backgrounds that are not represented on the current board, and try to address those needs in future board development.</p> <p>3. Take a close look at the representation of land trusts on the board and representation of other constituencies or interested parties. What aspects of your community are important to your organization? What agencies, community groups, etc. should be aware of your organization and be contributing to your success?</p>	<p>2. Putnam Conservation Institute (advisory); Trustees of Reservations (directors)</p>

Working Model	Assessment	Comments	Action Steps	Examples of Best Practices
Mission				
1. Primary purpose of organization is to provide land trust services.	Partial	Many service centers are involved in a variety of activities in addition to land trust assistance. It is a concern that organizations who take on too much may end up setting land trust services aside for more profitable activities. In order to be successful at providing services, it is important that the additional priorities of the organization not be excessive. In order to maintain a strong land trust services program, it should remain a high priority in the organization. This is not to say that it should be the only focus of the organization, but rather a priority that does not get left behind when funding is tight or time is limited.	<p>1. Review the priorities/goals of the organization.</p> <p>A) If funding was limited, in what priority would these objectives be pursued?</p> <p>B) Where do land trust assistance/services fit on this list?</p> <p>C) If land trust services needed to be minimized, what services do you think are most effective and must stay strong?</p> <p>Discuss these questions with your board to identify what the true priorities are. The higher the priority, the stronger the land trust services program will be.</p>	<p>(see Appendix C)</p> <p>1. California Council of Land Trusts</p> <p>2. IN Land Protection Alliance,</p> <p>3. CT Land Trust Service Bureau</p> <p>4. Compact of Cape Cod</p> <p>5. Texas Land Trust Council</p>
2. Land trust services are reflected in the organization's mission.	Yes	Many service centers have a broad mission or are a part of a larger organization's mission. In order to keep land trust assistance as a priority, it is important that it be clearly stated in the mission of the organization. If the larger organization has a broad mission, it may be helpful to establish a more detailed mission for the particular service center program. The mission is what guides the organization in difficult times. If land trust services are important, and are not clearly stated, they may get brushed to the side.	<p>1. Review organization's mission and/or mission for service center program.</p> <p>A) Does the mission clearly state land trust services?</p> <p>B) Does the mission statement identify the priorities of the organization/program accurately?</p> <p>Make sure that the mission statement supports what your board finds to be the true purpose of the organization. Missions should remain fairly brief, but detailed enough to clearly understand what the organization is committed to.</p>	<p>1. NH Center for Land Conservation Assistance</p> <p>2. The Land Trust Service Bureau</p> <p>3. MA Land Trust Coalition</p> <p>4. CT Land Trust Service Bureau</p>

Working Model	Assessment	Comments	Action Steps	Examples of Best Practices
Strategic Planning				
1. The organization has a strategic plan.	Yes	Even the smallest of organizations should have some level of a strategic plan, even if it is a one page memo of board discussion about their priorities and goals at an annual retreat. Outlining what the organization wants to accomplish in the coming year and work toward over the next two or three years is very important in staying focused and achieving the organization's overarching goals. Ideally, every one will have this conversation with their board and develop a few major goals for the coming year and strategies/action plans for how to achieve those goals.	<ol style="list-style-type: none"> 1. Plan to have a retreat to discuss the goals/objectives for the coming year. 2. Clearly document these goals and list action steps for how to implement them 3. Make sure that the goals for the next year or two contribute to the overall mission of the organization. 4. For a larger organization, a full blown strategic planning process, with a professional facilitator is most appropriate. 	<ol style="list-style-type: none"> 1. MA Land Trust Coalition 2. PA Land Trust Association 3. Gathering Waters 4. TX Land Trust Council 5. IN Land Protection Alliance 6. ME Land Trust Coalition <i>(example of new organization building a vision)</i> <i>(example of strategic planning with both an advisory board and board of directors.)</i>
2. The strategic plan discusses land trust services.	Yes	Several service centers work under a larger strategic plan for their umbrella organization. This is very reasonable, so long as there is an adequate section regarding land trust services that is discussed in detail and provides clear guidance for the program.	<ol style="list-style-type: none"> 1. Does your board discuss land trust services in detail at their strategic planning meeting? If not, does your advisory group discuss it in detail and make recommendations to the board? Somebody needs to be discussing the future of the program. 2. Are land trust services clearly identified in the plan, and are the future goals clearly articulated? 	
3. The strategic plan is reviewed annually.	Partial	Organizations should consider holding an annual strategic planning retreat to review the strategic plan, discuss pressing issues and plan for the upcoming year.	<ol style="list-style-type: none"> 1. Establish an annual retreat to discuss the strategic plan, or dedicate an adequate amount of time for the discussion at a designated board meeting each year. (Ideally this discussion would take place at the beginning or end of the year in order to discuss the accomplishments of the year, and goals for the upcoming year.) 2. Be sure to review the plan carefully, identifying areas that need to be revised/expanded/deleted. Keep in mind that unexpected events occur and require plans to change. 	<ol style="list-style-type: none"> 1. Texas Land Trust Council - reviews plan every January

Working Model	Assessment	Comments	Action Steps	Examples of Best Practices
4. The strategic plan is being implemented.	Yes	It is easy to make a plan, but difficult to stick to it. In order to successfully achieve one's mission, it is important to take the strategic plan seriously and in small steps. Once the goals are set out, the steps it takes to achieve the goals must be identified and organized in bite size pieces. Many strategic plans sit on a shelf and collect dust. If a clear list of tasks is identified, a strategic plan can be a great tool for guiding the organization toward achieving a goal, not just dreaming about it.	<ol style="list-style-type: none"> 1. Establish action plans for each of the major goals of the strategic plan. 2. Make the tasks manageable and identify who will be responsible for them. 3. Provide timelines where applicable to prioritize which tasks are time sensitive or a priority. Prioritization and deadlines are very important. 	(Clear action steps that can be easily implemented and measured): <ol style="list-style-type: none"> 1. PA Land Trust Association 2. TX Land Trust Council 3. Gathering Waters
Financial Resources				
1. Majority of land trusts are members.	Partial	Regardless of whether you are a membership or non-membership based organization, the land trusts that you are serving should be supporting your organization. Ideally, there is financial support in addition to board service. The land trust community directly benefits from the service center's success and should be setting an example that encourages other conservation minded citizens, organizations and businesses to become involved and contribute financially. If the organization is not membership based, land trusts should express their support in other ways to help improve the image and success of the service center.	<ol style="list-style-type: none"> 1. Identify how many land trusts in your service area are involved and/or contributing to the organization. 2. Make personal phone calls to the land trusts that are not contributing and see how you can get them involved, and understand what their hesitations are. 3. Ask land trusts what "membership benefits" are most important to keep them involved, and ask what else could be provided to make their membership worth while. 	<ol style="list-style-type: none"> 1. Conservation Trust for North Carolina 2. RI Land Trust Council 3. TX Land Trust Council 4. PA Land Trust Association 5. Gathering Waters 6. NH Center for Land Conservation Assistance 7. Compact of Cape Cod 8. MA Land Trust Coalition

Working Model	Assessment	Comments	Action Steps	Examples of Best Practices
2. More than one type of membership.	No	Although land trusts are the main constituency, service centers need to involve the greater community as well. A large part of fundraising is establishing a place in the community, and gaining support from a variety of social, economic, political, and cultural arenas. Encouraging memberships from families, corporations, agencies, individuals, etc. builds a foundation for a well rounded support system. It also keeps a variety of people informed and well educated.	<ol style="list-style-type: none"> 1. Review your current membership structure. Are individuals, businesses, families, students, etc. all considered in the membership program? 2. Analyze the demographics of your current membership - what groups are dominating your membership, and who are you not reaching that you would like to get involved? Make a special effort to reach these people through a letter, event invitation, etc. 	<ol style="list-style-type: none"> 1. TX Land Trust Council, 2. CO Coalition of Land Trusts, 3. Compact of Cape Cod, Inc., and 4. NH Center for Land Cons.Assistance
3. Benefits are provided to members.	Yes	Benefits are critical in maintaining members, educating the public, and getting people involved. Newsletters, events, t-shirts, mugs, and access to information all provide ways to spread the word, assist land trusts from a distance, and keep members informed of where their dollars are going.	<ol style="list-style-type: none"> 1. Are your benefits a reasonable trade off for your membership dues? Are dues fair, do they need to be raised? 2. Do your benefits appeal to members other than land trusts? 3. Are you consistent with your benefits - do you keep your promises and are you careful about making sure everyone receives their benefits on time? 4. Ask land trusts what else they would like to see you provide as a result of their membership. 5. If you don't have a membership program, what extra perks can you provide in exchange for additional support? 	see appendix D for list of membership benefits
4. No one land trust contributes significantly more.	Yes	All service centers seem to have a fair sliding scale or flat rate for land trust membership dues. It is important that land trusts feel they are paying a fair amount for the benefits they receive. However, some service centers may need more support from land trusts than others depending on the situation. It is important that the board have this discussion on a regular basis and find a happy medium that all can live with.	<ol style="list-style-type: none"> 1. Have you increased your membership dues for land trusts lately? 2. If land trusts have been complaining about an increase in dues, emphasize the importance of the service center and see if there is an extra service you can provide in recognition of the increased dues. 	<p><i>Sliding Scale:</i> CO Land Trust Coalition, ME Land Trust Network , CA Council of Land Trusts, PA Land Trust Association , Conservation Trust for NC, Heart of the Lakes</p> <p><i>Set Rate:</i> TX Land Trust Council, MA Land Trust Coalition</p>

Working Model	Assessment	Comments	Action Steps	Examples of Best Practices
5. More than 25% of the budget is dedicated to land trust services.	Partial	Regardless of the structure of the service center, a budget for training and technical assistance should be separate from the larger budget and adequate funds need to be allocated to have a successful program and plan effectively for the future. It is common for the land trust services to be mixed into a variety of other categories, and not treated as a separate entity. It is difficult to raise funds for the program if it is not clear where the money will be going, and how it will be used.	1. Is it clear how much money is dedicated to providing land trust assistance?	Budgets clearly showing cost of providing land trust assistance: 1. Compact of Cape Cod 2. CO Coalition of Land Trusts
6. More than 10% is dedicated to general administration for land trust services.	No	General administration of land trust services is often bundled into a larger budget of activities. It is important to separate out land trust services from other activities as best as possible in order to keep track of what it takes to run a successful program. Although everyone will organize their finances differently, it is important for the board to understand how big the program is, and what its needs are to succeed.	1. Review the budget and try to identify how much money was spent on the general administration of land trust assistance. 2. Where are the greatest expenses of time and money in running this program? 3. How much more effective would the program be if you had a little more staff time or a little more money dedicated to the daily operations of providing assistance to land trusts?	
Staff Support				
1. There is at least one full-time staff person dedicated to land trust services.	Partial	There are a variety of methodologies for providing staff support. Whatever the methodology may be, it needs to be organized, manageable, and effective. If there is a small staff, the board needs to be involved in keeping staff responsibilities reasonable, and committees hard working and effective. With a larger group of staff, responsibilities need to be well defined, and land trusts need to have a single contact person to address their calls and maintain the working relationship.	1. Review current staff arrangements. A) Do land trusts have a "go to" person when they call, or do they get passed around? B) How many people are dedicated to land trust services? If there are multiple people involved, their purpose should be clear. C) How are responsibilities distributed? Is one person doing everything, or is it a well organized small group of people? It is important to not have one person trying to do everything or having a dozen staff try to piece a single program together. D) How can your board get more involved or organized to assist the staff in managing the program? Are committees hard working and effective? Are board meetings efficient with good discussion?	<i>Primarily one person, often with multiple tasks:</i> TX Land Trust Council, CO Coalition of Land Trusts, RI Land Trust Council, NJ Conservation Foundation <i>Multiple staff contributing in different ways:</i> Conservation Trust for NC, Gathering Waters

Working Model	Assessment	Comments	Action Steps	Examples of Best Practices
Continuing Education				
<p>1. At least one Board/Staff member/Volunteer or Intern is sent to a land-trust focused training each year</p>	<p>Yes</p>	<p>Service centers show evidence of excellent attendance at land trust training events. However, it is often the executive director attending the meeting. It is important to get board members involved as well. This gives them the opportunity to see first hand what the issues are in the land trust community and what role service centers need to play. Executive Directors have often been in this business for many years. It is the board members that need to attend these meetings first hand and help the staff educate the board about important issues.</p>	<p>1. Who in the office and on the board has attended a land trust training event in the past two years? 2. How many board members have attended some sort of conference/training? 3. Are there any training sessions for service centers in particular? Service centers should start advocating for training opportunities that help them build stronger organizations.</p>	<p><i>All service centers send representatives to training opportunities.</i></p>
<p>2. Information from conferences is formally presented to other board/staff members.</p>	<p>No</p>	<p>Knowledge is powerful, but not when it is only held by one person. The entire staff and board needs to be on top of current issues and concerns regarding service centers. There are many service centers whose executive director has attended rally and regional training for years. If board members and other staff are unable to attend, it is critical for the information from the training event to be filtered down to other staff and board members.</p>	<p>1. Identify important issues that were addressed at the training and the board should be aware of. 2. Designate a few minutes at the board meeting to present and discuss this information. 3. Dedicate the first 5 minutes of every board meeting to current events/concerns/pressing issues about the organization that board members should be aware of.</p>	<p><i>Service centers indicated that formal presentations were occurring but did not provide detailed information regarding how it was presented and when.</i></p>

Working Model	Assessment	Comments	Action Steps	Examples of Best Practices
LAND TRUST SERVICES				
Land Trust Training				
1. Organizes at least one training per year.	Yes	Most service centers host one major conference per year, which is excellent. Providing smaller workshops in addition to a larger annual conference should also be considered. Smaller conferences provide an opportunity to focus in on specific issues in a more intimate setting. Smaller workshops can also be an opportunity for more effective networking and discussions about regional issues.	<p>1. How can your annual conference be improved to meet the needs of land trusts, expose them to new and pressing issues in the conservation field, and enhance the effectiveness of land trusts?</p> <p>A) Would a “needs assessment” be appropriate to help identify what topics land trust need assistance with?</p> <p>B) Have any land trusts completed organizational assessments that could be used to guide future conference topics?</p> <p>2. Are there particular topics that should be covered in a short workshop, separate from the main conference? (such as Strategic Planning, Standards and Practices, stewardship responsibilities)</p> <p>3. Is there a particular component of the conference that is region specific and should be transformed into a smaller workshop and offered in several different regions?</p>	<p><i>Nearly all service centers organize one conference per year. All appeared to be strong and successful.</i></p> <p>Putnam Conservation Institute provides workshop summaries and materials from past conferences that was very helpful.</p>
2. Organization informs land trusts of outside training opportunities	Yes	Service centers can't offer everything, and shouldn't be expected to. However, they should make an effort to build relationships with other organizations and businesses providing guidance and consulting to nonprofit organizations. It is important for service centers and land trusts to be educated in nonprofit management in addition to land trust work. Service centers can do a great service to land trusts by informing them of other training opportunities available, outside of their own services.	<p>1. Who in your community provides trainings and workshops on nonprofit management?</p> <p>A) Build a relationship with these businesses/organizations and keep each other informed of training opportunities.</p> <p>B) Keep a calendar on your website with upcoming training opportunities or send emails out to land trusts listing opportunities.</p>	<p><i>Several websites included information about training opportunities, including: Gathering Waters, Putnam Conservation Institute, CO Coalition of Land Trusts, PA Land Trust Association</i></p>

Working Model	Assessment	Comments	Action Steps	Examples of Best Practices
Land Trust Technical Assistance				
1. Keeps land trusts generally informed of public policy issues.	Yes	Public policy is constantly changing and land trusts play a critical role in educating their representatives and local governments about pressing issues. It is important for land trusts to stay informed about these issues and be ready to act. It is often difficult for them to follow the national issues on a regular basis. Service centers can be helpful in forwarding important articles, messages, and announcements to land trusts. Although service centers shouldn't be held responsible for getting ALL important news out, they can certainly help distribute important messages out to the land trusts.	1. Forwarding LTA emails to a list of executive directors is a great way to stay informed. 2. Electronic updates and brief newsletters are also effective.	1. Many service centers forward announcements from LTA and other sources to land trusts via email and have information on their website. 2. Heart of the Lakes primarily focuses on policy issues. 3. Conservation Trust for NC, MA Land Trust Coalition, and Gathering Waters inform land trusts via listserves as well
2. Provides materials that can be distributed to landowners.	Yes	Each region of land trusts will have different needs, but establishing a base of informational documents that can be shared with a diverse audience is very helpful in sending a consistent message to landowners and providing materials for young land trusts to work with.	1. Check to make sure that your brochures are accurate and current. Land trusts may be willing to work with you in updating the materials if they are useful to land trusts across the state. Talk with local agencies that work with landowners or have conservation interests. They may also be willing to contribute to your effort, assist with printing costs, etc.	ME Land Trust Network, Putnam Institute and Gathering Waters
3. Provides examples of documents, policies and procedures upon request.	Yes	Having sample documents is very helpful for land trusts that are just getting started or are updating their documents. LTAnet is a great resource, but it is also important to have local examples that address local issues, legislation, etc. Collecting sample documents within the region that comply with the new standards and practices would also be a great resource for land trusts in preparation for accreditation.	1. Start collecting documents that land trusts are willing to share with other land trusts. 2. Explore LTAnet and identify examples both nationally and locally that may be helpful to land trusts.	PA Land Trust Association, Conservation Trust for NC, and MD Environmental Trust have model documents available on their website.

Working Model	Assessment	Comments	Action Steps	Examples of Best Practices
4. Provides names/references of professional services.	Yes	Land trusts often look to service centers for answers to questions. It is up to service centers to provide the answer or help land trusts find the answers. Developing relationships with a variety of professionals is a valuable tool in helping land trusts solve problems. Appraisers, attorneys, biologists, engineers, and nonprofit consultants are examples of the professional fields that land trusts may need access to.	<ol style="list-style-type: none"> 1. Discuss with the board how you want to handle references. Identify if there are certain criteria that professionals must meet in order to be added to your list. 2. Talk with the professionals you currently work with and ask if they have any other references 3. Consider making a presentation at continuing education programs for attorneys, financial advisors, appraisers, etc. to find interested parties willing to get the training necessary to assist land trusts. 	MD Environmental Trust has attorney and appraiser lists available online.
5. Provides an inventory/database of land projects in the service area.	No	Establishing an inventory of protected properties can be valuable in fundraising, project planning, political efforts, and biological research. However, there are significant concerns regarding confidentiality and the information being used for the wrong reasons. It is something that should be discussed but pursued with caution.	<ol style="list-style-type: none"> 1. Board and staff should discuss the concept of developing a database of land protection projects, and assess the benefits and risks. A conversation with each individual land trust is also critical to determine what the challenges may be in each community and whether or not it would be an effective tool for the region. 	CA Council of Land Trusts, TX Land Trust Council and Conservation Trust for North Carolina are all exploring this idea
Land Trust Collaboration/Networking				
1. Provides a directory of land trusts across the state/region.	Yes	Land trust directories are a helpful tool for land trusts to easily communicate with each other and refer landowners to the appropriate organizations. It is helpful to have a clearinghouse for up to date contact information for land trusts throughout the state.	<ol style="list-style-type: none"> 1. Do you have a directory and is it current? 2. What type of information could you include in the directory that would be helpful, outside of contact information? (acreage protected, counties serviced, staff members, etc.) 	Conservation Trust for NC, TX Land Trust Council, CO Coalition of Land Trusts, Gathering Waters, GA Land Trust Service Center, ME Land Trust Network. (Several were posted online with links to websites, and interactive maps)

Working Model	Assessment	Comments	Action Steps	Examples of Best Practices
2. Provides opportunities for land trusts to network.	Yes	Service centers should focus on providing professional as well as social atmospheres for networking to occur. Conferences are a great opportunity, but also a busy time.	<ol style="list-style-type: none"> 1. Ask land trusts what the most effective networking opportunities have been. 2. Dedicate lunch hours and coffee breaks during conferences for networking. 3. Consider inviting professionals in the community to networking activities, broadening the scope beyond land trusts and familiarizing others with the land trust community. 	Most networking opportunities were organized as part of the annual conference. Most websites were effective in announcing other community events related to conservation.
3. Provides opportunities for land trusts to share information and personal experiences.	Yes	Networking in a social setting can provide an opportunity for more stories to be told, and young land trusts to find mentors.	<ol style="list-style-type: none"> 1. Find an opportunity for a more informal gathering for land trusts to share experiences. 	Conservation Trust for NC and Texas Land Trust Council encourage regional gatherings as well, to encourage regional collaborations and networking in a more intimate setting.
4. Encourages and facilitates collaborative opportunities.	Yes	Land trusts and service centers should try to brainstorm regularly to identify strategic opportunities for collaborative efforts including projects, fundraising, and outreach.	<ol style="list-style-type: none"> 1. Encourage land trusts to consider collaborative opportunities in fundraising, land acquisition and events. Although it is not always appropriate, it can be a great way to accomplish tasks that are too big for one organization to take on. 2. If a collaborative effort has been successful, make sure the story gets told at the annual conference. 	
Land Trust General Consultation				
1. Facilitates the development of new and growing land trusts.	Yes	States and regions are unique in the number of land trusts and area that each land trust covers. What is important is that new land trusts have the support they need to be successful, no matter what area they cover or what kind of work they plan to do (acquisition, easements, etc.)	<p>Ways to help:</p> <ol style="list-style-type: none"> 1. Attend the first few board meetings of a newly formed land trust. 2. Give a presentation about the service center and its role. 3. Introduce the organization to Standards and Practices. 4. Introduce the board president or executive director to other land trust leaders that they can learn from and talk to. 	Gathering Waters and Texas Land Trust Council have been especially involved in the creation and development of many land trusts in over the past several years.

Working Model	Assessment	Comments	Action Steps	Examples of Best Practices
2. Offers guidance for land trusts in transition.	Yes	Transitions can occur for many reasons, but service centers can provide assistance in connecting organizations with other land trusts that have been in a similar situation.	1. Be aware of land trusts going through changes and offer assistance where appropriate. (help facilitate a board discussion, refer them to other land trusts in a similar situation, etc.)	<i>All service centers deal with a variety of capacity building issues with land trusts.</i>
3. Offers guidance for land trusts considering a merger.	Yes	Land trust mergers are only being considered in a few areas, but can be very complex. Service centers should consider getting outside guidance in the case of a merger in their area.	1. Offer to discuss the benefits and challenges of a merger with the land trusts. 2. Recommend that the land trusts seek professional guidance for facilitating a more serious discussion about the process.	Conservation Trust for North Carolina recently supported a group of land trusts discussing a possible merger.

LTA and Service Center Partnerships. One of the ongoing discussions amongst LTA and the service centers is how they can work together more effectively to provide quality services throughout the country on a local level. The regions with the most effective training and technical assistance opportunities seem to occur where service centers are working in partnership with LTA regional programs or have additional LTA support through contractual agreements. One recommendation from this study regarding partnerships is for LTA to establish and maintain regional offices, contractual agreements, or staff positions that allow LTA to work closely with service centers to meet the needs of the land trusts. Meeting the needs of land trusts seem to much more difficult in areas of the country that LTA does not have a regional office or a working partnership with service centers.

The second recommendation is for LTA to offer more funding to support young service centers working to establish themselves and assist land trusts. Depending on the capacity of the service center in each region or state, the relationship with LTA will and should differ. The third and most important recommendation is that LTA and service centers begin a dialogue to discuss which regions need LTA to provide direct services to land trusts, and which regions have well established service centers that have a strong infrastructure but need financial support from LTA to fulfill their mission. Table 6.4 illustrates the variety of services that service centers, regional LTA offices, and the national LTA office need to share the responsibility of in order to adequately provide assistance to land trusts throughout the country. Each region will need to discuss the capacity of the service centers, regional offices, and national office and determine which organizations are in the best position to provide which services.

Regional Offices. Three of the most valuable services that LTA regional programs have provided in the past are land trust organizational assessments, regional conferences, and land

trust needs assessments. The organizational assessments provide land trusts a jump start for identifying their areas of weakness in order to make the most out of the service center training sessions or other services. The LTA organizational assessments guide organizations through a question and answer process that assists them with identifying which *Land Trust Standards and Practices* the organization is in compliance with and which organizational practices may need to be strengthened or modified. This is a very time consuming service that most service centers are unable to carry out, but provides an excellent tool for land trusts to make the most of services provided by the service center. The Excellence Program in Texas is a great example of a partnership between LTA and a service center to support organizational assessments. In this case there is not a regional office, but all regional offices should use this as an example for how LTA can support service centers in carrying out this responsibility. In many areas, this is a great opportunity for service centers to get to know their land trusts.

The land trust needs assessments are also an excellent resource from LTA that helps service centers be more effective. The needs assessment is conducted using a questionnaire which identifies the land trusts' priority needs and helps LTA in providing the most effective training, services and support programs. It is much less time consuming than full organizational assessments but provides a similar result of what type of assistance is needed most. The benefit of the needs assessment is that it is a short questionnaire that addresses a wide variety of topics, such as collaborative regional efforts, characteristics of natural resources being protected, and land trust activities beyond land acquisition. If resources are limited, the needs assessments identify the areas in which land trusts are most interested or need the most guidance, and service centers can focus their training on these issues. Molly Scarborough (Excellence Program),

Chuck Roe (Southeast Program) and Renee Kivikko (Midwest Program) have completed very thorough and effective assessments.

The third valuable resource that LTA brings to the service center and land trust community is a regional conference. These conferences bring land trusts together throughout the region, beyond the service area of state-wide service centers. It is important for land trusts to learn about what is going on in their region and network with professionals in other states.

Financial Resources. Aside from services, the financial support of LTA is critical in assuring the success of service centers. LTA has the opportunity to fundraise for the overall enhancement of land trust capacity, and these resources need to be filtered to the local level in addition to supporting national efforts. A great deal of the work will be completed at the local level, and it is going to take some time to build the local financial support for service centers to succeed. Financial support through grants and access to other resources will play a significant role in putting service centers in the position to deliver effective services to land trusts.

With strong partnerships between LTA and service centers, financial resources can be maximized and services will be delivered most efficiently. LTA and service centers can decide on a regional basis which services should be provided by an LTA staff person or through contractual agreement, and which services should be provided by the service center. Regional conferences will also expose land trusts to the ideas, challenges, and successes of land trusts in neighboring states and build a stronger regional community. LTA and service centers are each unable to meet the needs of land trusts on their own, but their collaboration has proven to meet the needs of land trusts more effectively. Table 6.4 provides a framework for discussing how LTA and service centers can collaborate to provide adequate and equitable assistance to land trusts throughout the country on a local level.

Table 6.4 Recommendations for Partnerships Between LTA and Service Centers (By level of relationship)

	National LTA	LTA Regional Programs and Service Centers (Responsibilities to be determined on a regional basis)	Tools	Benefits for Land Trusts
Public Policy	Represent the land trust community in national policy issues.	<ol style="list-style-type: none"> 1. Communicate regional success stories and land trust concerns to the national LTA office. 2. Represent the local land trust community on state policy issues, when appropriate. 	Networks, Listserve, email updates, policy bulletin board, workshops, materials	<ol style="list-style-type: none"> 1. An opportunity to have a political voice on a national level. 2. Support for state-wide policy issues.
	Provide policy updates with clear facts via lta.org and emails to regional offices and service centers.	<ol style="list-style-type: none"> 1. Send/forward relevant national policy updates to local land trusts. 2. Explain potential impact to local land trusts. 3. Recommend actions that should be taken. 		<ol style="list-style-type: none"> 1. Receive updates on public policies directly related to their work (state and national). 2. Guidance on when actions need to be taken to address the issue (state and national).
	Provide general suggestions and tools for how land trusts and service centers can contribute to a particular issue.	<ol style="list-style-type: none"> 1. Assist land trusts with the appropriate action for State and National issues. 	Lobbyists, templates, contact information for govt. reps, press releases	<ol style="list-style-type: none"> 1. A clear strategy for making an impact on policy. 2. Tools and assistance in taking appropriate actions.
Accreditation Program	Develop program, commission, and introductory educational materials.	<ol style="list-style-type: none"> 1. Work with service centers to develop a strategy/ timeline for how land trusts in each state can all become accredited over time. 2. Articulate the state's challenges/concerns to LTA or Accreditation Commission. 3. Provide accreditation materials to help educate the general public. 4. Educate land trusts about the accreditation program and assist them through the process. 	publications, presentations, fact sheets	<ol style="list-style-type: none"> 1. A voice regarding the strengths/weaknesses of the accreditation program. 2. A strategy for getting land trusts through the accreditation process. 3. Guidance throughout the accreditation process. 4. Acknowledgement of achievement amongst general public.

	National LTA	LTA Regional Programs and Service Centers (<i>Responsibilities to be determined on a regional basis</i>)	Tools	Benefits for Land Trusts
Curriculum Program	Design/Develop/Revise/Deliver Curriculum.	<ol style="list-style-type: none"> 1. Educate land trusts about organizational assessments, the process, and benefits. 2. Conduct organizational and needs assessments to identify areas of curriculum that need to be covered in particular states. 	Materials, workshops, LTA contracts with Service Centers	<ol style="list-style-type: none"> 1. Organizational assessments to help land trusts identify areas that need improvement.
Training	<ol style="list-style-type: none"> 1. Provide grants to support service center training programs. 2. Host National LT Rally annually. 	<ol style="list-style-type: none"> 1. Organize and sponsor a regional land trust conference each year, focusing on national issues and areas of curriculum needed in region. 2. Organize and sponsor a state wide land trust conference each year, focusing on areas of curriculum needed in state. 	Stds. and Practices Curriculum, LTA sponsorship of conferences	<ol style="list-style-type: none"> 1. Three extensive training opportunities for board members and staff.
Technical Assistance	Maintain LTA net, RallyNet, Land Trust Listserv	<ol style="list-style-type: none"> 1. Support service centers in providing examples of documents and professional references for advice and guidance. 2. Provide networking opportunities and other resources to land trusts. 	State-wide listserv, social events, sample documents, land trust directory, materials, and professional references.	<ol style="list-style-type: none"> 1. Access to sample documents and professional guidance. 2. Access to national and statewide issues/discussions. 3. Opportunities to network on a state and regional level.

Conclusion

Land conservation has become a national concern that the land trust community is working hard to address. The rapid growth of the land conservation movement has resulted in a large number of land trusts protecting a significant amount of land. As with all rapidly growing businesses, land trusts are faced with the challenge of building their capacity fast enough to handle the demands. In order for land trusts to enhance their organizational capacity and conservation efforts in these challenging times of growth, training and technical assistance is essential. There are a variety of service centers working hard to meet the needs of land trusts, but it has been unclear how many there are, what services they are providing, and what their capacity is. The Land Trust Alliance is committed to working with service centers to build a more comprehensive program for training and technical assistance throughout the country, but who these service centers are and how they can most effectively work together has long been a mystery.

This study brings clarity to the matter by defining the service center community, examining their capacity to provide training and technical assistance, and recommending ways to build a stronger national network of service center organizations. With the results of this study, the role and capacity of today's service centers is understood from a national perspective, and steps can be taken to build a more unified delivery service for training and technical assistance that will allow the land trusts to succeed during this critical phase of the land trust movement.

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Appendix A. Service Center Profiles and Population Characteristics

Three Types of Service Centers

There are a variety of organizational structures under which service centers operate to provide training and technical assistance to land trusts. Roe's 2002 study focused on land trust coalitions and networks, many of which provide training and technical assistance to land trusts throughout their region. Roe's study identified four models of networks and coalitions: the big sister/brother model, state agency supported land trust networks, federations of land trusts, and state-wide service centers.

The *big sister/brother* model represents land trust collectives that were initiated by an accomplished and dominant land trust (Roe, 5). *State agency supported* networks are either staffed or financially supported by a state agency (Roe, 8). *Federations* of land trusts are a group of land trusts that have come together through the process of a dialogue or dominant land trust leadership (Roe, 9). The *state-wide service centers* are organizations established for the purpose of providing assistance to land trusts (Roe, 11). Roe's study looked at all levels of collaborative and collective effort (such as policy efforts, acquisition projects, or technical assistance). This study looks more specifically at the training and technical assistance programs provided by these four models of collective efforts. When examining training and technical service programs, a different division line becomes apparent among the organizations. Similar to Roe identifying four categories of networks and coalitions, this study identifies two varieties of service providing organizations: stand alone service center organizations (similar to Roe's state service centers and federation of land trusts), and training and service center programs that are an established program or sister project of a larger organization and provide land trust training and technical assistance (similar to Roe's model of organizations supported by state agencies and big sister/brother model).

In addition to these two categories, the Land Trust Alliance regional offices that provide training to land trusts create a third category. These programs are regional branches of the national Land Trust Alliance, a national umbrella group and service provider for land trusts. Therefore, there are three categories of programs identified in this study; 1) service center organizations (training and technical assistance programs delivered by independent nonprofit organizations whose primary role is to support land trusts), 2) service center programs (training and technical assistance programs supported or administered by other nonprofit conservation organizations), and 3) training and technical assistance provided by Land Trust Alliance regional offices. Table 6.2 identifies the three groups of service centers.

Service Center Organizations. Training and technical assistance programs delivered by independent 501(c)(3) organizations in this study were found throughout the country, at a variety of stages of development. For example, the Colorado Coalition of Land Trusts and the Texas Land Trust Council are both independent organizations, founded within the past five years, and each have an Executive Director leading the organization. The main purpose of these organizations is to provide support for land trusts to become more effective and sustainable organizations. Organizations such as Appalachia Ohio Alliance and the Indiana Land Protection Alliance on the other hand are very young organizations, and are just beginning to offer services.

Gathering Waters Conservancy, The Rhode Island Land Trust Council, and Pennsylvania Land Trust Alliance, were established closer to ten years ago, and are involved in a variety of activities (one of which is training and technical assistance to land trusts). The Compact of Cape Cod is unique in that it is the oldest land trust service center, founded in 1986 by local land trusts. It is an excellent example of how a grassroots effort of dedicated land trusts can build a sustainable service center that continues to evolve to meet the needs of land trusts. Depending on the age of the organization and the needs of the area, independent service center organizations tend to be unique in the services they provide, their membership structure, and governance structure.

Service Center Programs. Land trust assistance programs supported by other conservation organizations were also found throughout the country. The programs were supported by a variety of organizations, including land trusts, public policy organizations, and other outreach and education based institutions. The type of organization to which the service center is connected plays a significant role in the services they provide, the operating structure, and their access to financial resources. Overall, many of the basic training and technical services they provide are similar, but the structure under which they operate varies significantly. One challenge recognized in this study is that their financial and administrative resources are closely tied to their associated organization, which makes it difficult to assess the training and technical assistance programs independently from other activities.

Land Trust Alliance Regional Service Centers. The third group of service centers represent the regional Land Trust Alliance programs. These programs are supported by the national Land Trust Alliance organization, but work on a regional level to provide services to land trusts. Although they are supported by the national group, a significant amount of their funding comes from regional fundraising and foundation grants. These regional programs work closely with other service centers, networks, and coalitions to encourage a collaborative effort in building a strong land trust community throughout each region.

Although the structure of the organization plays a critical role in how the organization operates, the environment in which it operates is also important. The following section discusses the variety of environments that service centers are working with across the country. It is the combination of the organizational structure and working environment that creates the challenges and opportunities for service centers to meet the components of the working model. With the structure and environment of the population identified, the results of how these organizations compare to the working model can be more clearly understood.

Overall Characteristics of Population

Each service center is faced with a unique challenge depending on their service area, and is working to build effective organizations based on their region's needs. Service centers working in a small state will provide services to as few as two land trust organizations (Ohio), or as many as 140 (Maryland). For those service centers in larger states such as Texas, there may only be 40 land trusts, but their distance between one another can be up to nine hours away. Therefore, service centers are challenged by the number of land trusts, and the geographic area that they have to reach. The regional Land Trust Alliance programs are especially challenged

by numbers and distance, but have the support of state-wide service centers to help them reach land trusts throughout the region.

Training and Technical Assistance programs are relatively new to the conservation community. Although assistance to land trusts has been occurring informally for years, the idea of establishing separate programs or organizations for the purpose of providing services to land trusts is a growing concept. Most of the independent service centers and programs established for providing land trust support have been established in the past 5-10 years. Several organizations are still in their formation stage (Appalachia Ohio Alliance, Heart of the Lakes, Indiana Land Protection Alliance). Other programs are well established, but experiencing organizational transitions. For instance, the Texas Land Trust Council is a 501(c)(3) organization but has been incubated by the Texas Parks and Wildlife Department (TPWD) for the past several years. As of January 2006, the Council will be separated from TPWD, and hire its first executive director. The Center for Land Conservation Assistance on the other hand was established to be a stand alone 501(c)(3) organization, but has decided that the future of the organization will be stronger if adopted as a program within the Society for the Protection of New Hampshire Forests. Depending on the needs, culture, and geography of the region, each service center has chosen a unique path to establish and reach its goals.

One of the many decisions that service centers must make is how to structure their organization. Although there are a variety of organizational structures that service centers have chosen, the working model identifies specific operating practices that should be attainable regardless of the overall structure. Although one model over time may be considered the most successful, there are currently a variety of service center structures that are very effective. Hopefully this model will prove to be helpful in building a variety of service centers with different structures but with equally effective training and technical assistance programs.

Appendix B. Service Center Survey

(Please note that this document has been translated from surveymonkey.com into a word document.)

Service Center Survey
Rebecca Blecke, MPA Applied Research Project
Summer 2005

PLEASE COMPLETE SURVEY BY JULY 15, 2005

Thank you for taking a few moments to complete the following survey. I hope this study will be useful to service centers throughout the country in addition to LTA and the national land trust community.

Over the past five years, I have been heavily involved with land trust work and find service centers to be a critical component for enhancing land trust organizations and conservation efforts. As the land protection coordinator at Catawba Lands Conservancy, I experienced first hand the benefits of a statewide service center. I am now in Austin, Texas completing my MPA and volunteering with the Texas Land Trust Council, who plays a critical role in assisting local land trusts throughout the state.

The purpose of my research is to complete a nation wide assessment of service centers, focusing primarily on land trust training and technical assistance programs. The result of this research is two fold. First, it will help identify some strengths and weaknesses of the current training and technical assistance efforts. Secondly, it will suggest what types of partnerships between LTA and service centers would likely be most effective at this time.

I will be sending this survey out to a variety of organizations that provide assistance to land trusts. Therefore, please note that the term "service center" is being used broadly for research purposes, and refers to any organization that provides some type of training or technical assistance to land trusts.

I will be compiling my data into a comprehensive format and sending each of you a copy in early 2006. I hope this document will provide service centers with helpful information about one another and encourage more networking efforts.

Thank you again for taking a few minutes to complete this survey, I look forward to sharing the results with you early next year!

Sincerely,
Rebecca Blecke

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PLEASE RETURN SURVEY BY: July 15, 2005 (preferably via email)

Via email: Reblecke@hotmail.com

Via mail: Rebecca Blecke, 1200 Barton Hills Drive #219, Austin, TX, 78704

IMPORTANT SURVEY INFORMATION:

1. Please note that there is a text box at the end of the survey for you to share additional information or comments regarding the survey. Please label comments according to the question number or topic.
2. If available, please email/mail me any documents that you feel will support your answers or provide a more thorough response beyond the space allowed in the survey. The documents most helpful to my research include:

strategic plan

list of programs/services provided

annual reports/financial information

membership brochure/information

Board of Directors roster

By-Laws

Land Trust Directory

Publications/Newsletter

The more documentation I have to support your survey responses, the stronger my research will be!

Please send/email information to:

Rebecca Blecke

1200 Barton Hills Drive Apt.219

Austin, TX 78704

512-656-0198

rebeccablecke@hotmail.com

3. Please make note of any questions you would like to keep confidential for research purposes only.
4. You are more than welcome to contact me via email or phone if you have any questions or concerns about the survey. (rebeccablecke@hotmail.com, 512-656-0198)

Thank you again for you participation!

Service Center Information

Name of Organization _____

Mission of Organization:

Contact Person _____

Phone: _____ **Email:** _____

Service Area (state, regional, etc.) _____

How many counties or states are in your service area? _____

Year Established _____

Mission

- 1. Is the primary purpose of your organization to provide services/support to land trusts? Yes No
- 2. Is providing land trust services one of several purposes? Yes No
- 3. Are the land trust services/support that you provide reflected in your organization's mission? Yes No

Governance

4. Who is the governing body of your organization?
 Board of Directors Advisory Group Other - please explain:

5. How many board/advisory group members does your organization have at this time? _____

6. How many members of your board/advisory group are land trust representatives? _____

Staff Support

7. Does your organization have the equivalent of at least one full time staff member dedicated to providing land trust services? Yes No Additional Explanation if needed:

Strategic Plan

- 8. Does your organization have a strategic plan? Yes No
- 9. Does the Strategic Plan specifically discuss land trust services? Yes No Not Applicable
- 10. Does your organization review the strategic plan annually? Yes No Not Applicable
- 11. Is the strategic plan being implemented? Yes No Not Applicable

Continuing Education

12. Does your organization send a representative (board/staff member/volunteer/intern) to at least one land trust- focused training per year (LTA Rally or regional/statewide conference)? Yes No

13. Is information from the conferences formally presented to other board/staff members?

Yes No

Financial Resources

14. What is your annual budget? (Estimation is acceptable) \$ _____

15. Do land trusts in your service area pay annual dues? Yes No

16. If land trusts pay annual dues, what is the dues structure? (sliding scale, set rate, etc.)

Please Explain:

17. Do you have fee for service programs? Yes No
(If so, Please list the services you provide for a fee...)

18. What percentage of your funding comes from land trusts in the form of dues?

0% less than 10% 10-25% 25-50% more than 50%

19. What percentage of your funding comes from land trusts in the form of fees for services?

0% less than 10% 10-25% 25-50% more than 50%

20. How many land trusts are within your region of service? _____

21. How many land trusts are members of your organization? _____

22. What types of members make up your membership base (Land Trusts, Individuals, Corporations, etc.)?
Please List:

23. What criteria do you have for membership?

24. What benefits do members receive?

25. If land trusts support your organization (via fee for service or membership), do certain land trusts contribute significantly more than others? Yes No Not Applicable

26. If land trust contributions vary, what percentage of your income comes from the largest land trust donor?

less than 10% 10-25% 25-50% more than 50% Not Applicable

27. What percentage of your budget is dedicated to land trust services?

0% less than 10% 10-25% 25-50% more than 50%

28. What services are specifically included in the land trust services portion of your budget?

Please provide your answer below:

29. What percentage of your budget is dedicated to general administration?

less than 10% 10-25% 25-50% more than 50%

30. What percentage of your budget is allocated specifically for general administration of land trust services?

0% less than 10% 10-25% 25-50% more than 50%

31. What major programs or expenses other than land trust services are included in your budget?

Please provide your answer below:

Land Trust Training

32. How many training opportunities (single or multi-day) does your organization typically organize each year?

(#) Half/One-Day Trainings each year (#) Multi-day Trainings each year

33. Does your organization inform land trusts of outside opportunities for training? Yes No

34. Do you currently have a certification program (certificates for attendance at training or CEU workshops)?

Yes No

Land Trust Technical Assistance

35. Does your organization provide materials that can be distributed to landowners? Yes No

36. Does your organization provide examples of land trust documents upon request? Yes No

37. Does your organization provide examples of policies/procedures upon request? Yes No

38. Does your organization provide names/references of professional services? Yes No

39. Does your organization provide an inventory/database of land projects in your service area? Yes No

40. What other types of assistance/services/support do you provide?

Please provide your answer below:

Land Trust Collaboration/ Networking

41. Does your organization provide a directory of all land trusts across the state (or region if applicable)?

Yes No

42. Does your organization provide opportunities for land trusts to network? Yes No

If yes, please provide examples of your efforts:

43. Does your organization provide opportunities for land trusts to share information/personal experiences?

Yes No If yes, please provide examples of your efforts:

44. Does your organization encourage/facilitate collaborative opportunities? Yes No

If yes, please provide examples of your efforts:

Land Trust General Consultation

45. Does your organization keep land trusts generally informed of public policy issues (i.e. forwarding LTA updates, important news articles, legislative agendas, etc. to land trusts)? Yes No

46. Does your organization facilitate the development of new and growing land trusts? Yes No

47. Does your organization offer guidance for land trusts in transition? Yes No

48. Does your organization offer guidance for land trusts considering a merger? Yes No

In Conclusion:

1. Many service providers are expanding/revising their programs, and I would like to make note of anticipated changes. If you expect that some of your answers to the above questions will change over the next year or two, please make note of which questions they are and how your answers would change. Please base your list of changes on formal board decisions that will more than likely be carried through (i.e. strategic plan, motion from the board).

Please provide your answer below:

2. What programs/activities do you anticipate your organization will be focusing on 3 years from now?

Please provide your answer below:

Please use the space below to add any additional comments or explanations regarding the survey.

PLEASE RETURN SURVEY BY JULY 15, 2005

Thank you again for your participation, I look forward to sharing the results with you early next year!

Sincerely,
Rebecca Blecke

MPA Program, Texas State University
1200 Barton Hills Drive #219, Austin, TX, 78704
512-656-0198
rebeccablecke@hotmail.com

Appendix C. Mission Statements of Service Centers

Appalachia Ohio Alliance	Conduct Conservation Easements to protect natural areas and family farms.
California Council of Land Trusts	<p>The California Council of Land Trusts acts as a unified voice for more than 150 land trusts working in local communities throughout California. The Council works to build a strong, effective land trust community with the financial and policy resources to protect California's landscapes. The Council helps individual land trusts protect the natural areas and farmlands important to the state and local communities by increasing the funding available to conserve and steward land. We leverage our expertise in policy and stewardship to advocate for the most effective ways to ensure that local places of value and importance are protected and stay protected for the benefit and enjoyment of Californians. We work to inspire awareness, vision and commitment among California's leaders and communities to protect the Golden State's natural heritage.</p> <p><i>The Council's primary objectives are:</i> Increasing and diversifying financial resources for the broad range of land conservation needs, including protection, stewardship, education and restoration. Ensuring that laws and policies support land conservation, and allows land trusts to continue working effectively with their local communities. Increasing awareness and support of land trusts and local land conservation among decision-makers, media, philanthropists, and the public. Serving as a forum for land trusts to communicate, share ideas, and address issues of common interest.</p>
Center for Land Conservation Assistance	To provide support and assistance to land trusts, conservation commissions and others seeking to conserve undeveloped land in New Hampshire through direct assistance, coordination, education, access to training and funding opportunities, and referrals.
Colorado Coalition of Land Trusts	The Mission of the Colorado Coalition of Land Trusts is to promote and support land conservation excellence in Colorado through leadership, advocacy, education and outreach.
Conservation Trust for North Carolina	To protect our state's land and water through statewide conservation and cooperative work with land trusts to preserve our natural resources as a legacy for future generations.
Connecticut Land Trust Service Bureau	The LTSB enhances the capacity of Connecticut's land trusts to preserve open space through training, networking, and providing referrals and information. The Nature Conservancy Connecticut Chapter administers and supports this work to help ensure the long-term viability of strong local land trusts as conservation partners.
Gathering Waters Conservancy	To help the people and communities of Wisconsin protect their land and water resources by strengthening the state's land trust movement.
Georgia Land Trust Service Center	To increase private land conservation by increasing the effectiveness and sustainability of land trusts in Georgia, the southeast and nationally.
Heart of the Lakes Center for Land Conservation Policy	<p>Heart of the Lakes Center for Land Conservation Policy is a Michigan nonprofit established to operate in the following charter areas: 1. Provide a state-level policy voice for Michigan's local land conservancies and for the private sector practicing land conservation. 2. Be an "honest broker" institute for research on land conservation and public land policy issues. 3. Serve as an inter-conservancy communication and partnership bridge between the hands-on local efforts and state issues and agencies. 4. Act as a central point of mobilization to assist State agencies in implementing programs at a local level and provide non-profit agency resources in partnership with the State where appropriate to further local land conservation. 5. Attract new resources to Michigan to further the work of local land conservancies. 6. Be a repository of institutional memory to assist policy makers and local land conservancy leadership. 7. Cultivate and educate the conservation leadership for tomorrow. Build a platform of sustainable leadership for local land conservation at all levels. 8. Provide education through conferences, seminars, dissemination of material, periodicals and other</p>

	methods to connect private sector land holders with local conservancy or State level programs and opportunities.
Indiana Land Protection Alliance	ILPA increases the pace and quality of land protection by enhancing the capacity of Indiana's land conservation community.
Land Trust Alliance – Southeast	Promotes voluntary land conservation and strengthens the land trust movement by helping local land trusts across America to improve their program proficiencies and conserve more land for the benefit of communities and the natural environment.
Land Trust Alliance - Northeast Program	Northeast Program Office services land trusts in New England and serves as state service center for land trusts in New York state. Approximately 500 land trusts in the Northeast, including approximately 95 in New York (approx 65 are LTA members). LTA Mission: We are the national convener, strategist and representative of more than 1,500 land trusts across America. Goals: Dramatically expand the pace of land conservation (through tax incentives); Build strong land trusts; Defend the permanence of conservation easements; Ensure that the work of land trusts is as strategically directed as possible.
Land Trust Alliance – Midwest Program	The Land Trust Alliance supports land trusts and works to increase both the quality and pace of land conservation by land trusts and their partners. LTA trains land trust practitioners, promotes best practices, encourages strategic conservation and advocates for incentives and funding for land conservation.
Maine Coast Heritage Trust / Maine Land Trust Network	MCHT works to conserve coastal and other lands that define Maine's distinct landscape, protect its environment, sustain its outdoor traditions and promote the wellbeing of its people. The Maine Land Trust Network (a program of MCHT) builds and sustains the quality and effectiveness of land trusts as well as other organizations engaged in land conservation, drawing upon their collective expertise and resources to ensure responsible and successful conservation
Maryland Environmental Trust	Conservation of farm & forestland, wildlife habitat, waterfront, natural areas, historic sites and scenic properties in Maryland.
Mass Land Trust Coalition	MLTC is a voluntary association of land trusts founded to provide a forum for the exchange of ideas and information, to increase the effectiveness of Massachusetts land trusts in working with the state legislature and environmental agencies, and to promote high professional standards.
New Jersey Conservation Foundation	To preserve New Jersey's land and natural resources for the benefit of all.
Pennsylvania Land Trust Association	The Pennsylvania Land Trust Association seeks to protect Pennsylvania's special places and landscapes for today and for generations to come. To increase the quality and pace of land conservation, PALTA helps conservation practitioners improve their effectiveness, builds public understanding, and advocates for better governmental policy.
Putnam Conservation Institute of The Trustees of Reservations	The Trustees of Reservations: 'To preserve, for public use and enjoyment, properties of exceptional scenic, historic, and ecological value in Massachusetts.' Putnam Conservation Institute: 'To increase the capacity of the conservation community to protect, care for, and interpret the natural and cultural resources of Massachusetts.'
RI Land Trust Council	To foster a sustainable land conservation movement in the State of Rhode Island by supporting the missions and operations of land trusts and providing a forum for their effective cooperation.
Texas Land Trust Council	To support and sustain the conservation efforts of Texas' land trusts.
The Compact of Cape Cod Conservation Trusts, Inc.	To assist in the acquisition and management of legally-protected open space on Cape Cod, by providing technical assistance to member land trusts and their communities

Appendix D. Survey Comments

(The information below represents excerpts from the surveys that provide insight into the operations and organizational structures of service centers. Some of the organization names have been removed for privacy purposes.)

Governance
The Midwest region maintains a relationship with several committees, organizations or networks to help guide the development and implementation of its program.
We are considering forming a separate advisory group made up of more practitioners to help us with policy decisions, etc.
national board of directors numerous 'ad hoc' advisory committees and task forces informal twice annual gathering of State land trust service centers; proposed additional networking with state and regional land trusts coalitions
LTSB is staffed by employees of TNC CT. As a program of the Chapter it is 'governed' by the State Director and Chapter Trustees.
each member land trust sends a delegate to serve on our board
We have 3 non-voting 'area representatives' as well, plus two ex-officio members from the MD legislature
Board elected by membership, which is comprised of 72 land conservation nonprofit organizations
We will add 2-3 more representatives from local land trusts in the next few months.
I anticipate that 50 - 75% of our new committee will have direct land trust connections. About half will be board members of SPNHF and about half of the others will be closely connected with other land trusts in other ways.
All of the land trusts in RI are run by volunteers except 3. Thus the Board members – who are also Board members of the Land Trust Council have little capacity to contribute energy to the State Council/coalition and its initiatives. This limits the capacity of the Council to undertake projects.
Steering Committee is comprised of 26 Charter Members and up to 6 members elected at large by the Full Members at the Annual Meeting in January.

Strategic Plan
We are currently updating our strategic plan and it looks like this plan will have increased focus on our land trust service role (in fact while MCHT is developing its plan, the Network program is creating its own plan to coordinate with MCHT's)
We currently measure progress against goals set during a Strategic planning retreat in Jan 04
Our current plan is for three years and was approved by the board a year ago.

Staff reviews it once or twice per year and board reviews it once per year.
The strategic plan will be revised this year. It is reviewed as a whole for its accuracy/need for revision about every 3 years. Annual workplans are to be done for each employee in accordance with/to implement the strategic plan.
NE Program completed 2004-2008 Strategic Plan.
What we have in the way of strategic plan is the documents that created CLCA and were responsible for its initial grant funding. We have been in organization transition for the past 20 or so months and have not updated any of the documents during that time. however, we were created to provide services to land trusts and apply much of our work to doing so.
The Strategic Plan was facilitated by a consultant. It is more of a wish list than a strategic plan. We develop an annual work program approved by the Board. We also respond to issues that arise requiring the Council's attention.
The Strategic Plan discusses the services MLTC provides to the land trust community. MLTC does no land trust work directly. The Strategic Plan is being implemented, though some aspects of the plan have received much more attention than others.

Membership Base
land trusts only
The Service Center is not a membership organization
LTA principally has land trust members; but additionally has membership categories for individuals and 'partner' groups and businesses
land trusts only
land trusts and a few watershed assns
XXX doesn't have 'members.' XXX(larger organization) has 42,000 individual members.
XXX has primarily individuals as members. XXX is designed for land trust membership only.
Land Trusts, with a few individuals.
Land trust organizations, individual and business/professionals
XXX is a quasi-public organization, an arm of XX DNR, and not membership-based. We do provide staffing and planning for an informal network of local LT's known as XXX Alliance.
land conservation nonprofit organizations
land trusts only
If you're talking about Council membership, it's land trusts only. If you're talking about XXX(service center/land trust) membership, it's mostly individuals plus some foundations and corporations.
individuals, foundations, corporations, organizations give financial support
Charter members - Land Trusts Supporting members - interested individuals, etc.

land trusts only
We are not a membership organization. We do have donors.
we plan to start with land trusts, then also solicit individuals, professionals who benefit from land trust activities (like surveys' appraisers, attorneys), and conservation commissions
Land Trusts and the board members of land trusts are our contacts.
Land trusts, conservation commissions, watershed authorities, open space committees, conservation organizations and conservation advocacy organization are members and friends.
Organizational Members = land trusts and local governments Associate Members = financial contributors
The NY program is not structured on a membership basis. The target for services are all land trusts in New York State whether they are Sponsors of LTA or not. The financial support for the LTA/NY programs comes from NY State, Foundations, Corporations, Land Trusts, individuals, and a small amount from earned income (less than \$20,000).
individuals, primarily. Also, corporations, trusts, non-profits.

Membership Benefits
Group liability insurance specifically designed for land trusts and Directors and Officers insurance Access to LTAnet Three subscriptions to our quarterly professional journal, Exchange Discounts on LTA's books and reports Discounts on registration for LTA's Land Trust Alliance Rally for each staff and board member. Discounts on other training programs. Eligibility for scholarships for training events. Eligibility for capacity-building grants (where available). Free job listings posted on LTA's Web site. Listing on the Find a Land Trust pages. Guidance in adopting Land Trust Standards and Practices
Organizational members get to vote on the board of Directors. Associate members and Organizational members both receive periodic updates and discounts and conferences and events
access to LTA training program; publication fee discounts; access to LTAnet electronic library resources; access to advisory and guidance services; group liability and operations insurance coverage at discounted fees; representation on national public policies
training opportunities, phone and email technical support annual convention organized by XXX referral to other conservation organizations that can better address their questions. membership in the XXX, which is the umbrella lobbying organization for groups interested in land conservation issues at the State level
access to fee for service; revolving loan fund; access to regional research
XXXusts recieve newsletters, email communications, discounts to training events, membership in the XXX Association of Non Profits (though technically

all but the last of these are given to all land trusts members or not - our philosophy is to keep folks in the loop so they do good work)
Funding, policy and communication.
Voting privileges (XXX board selection by land trust members only), receipt of electronic newsletter, business members receive recognition at annual conference, special notices of national and statewide interest, discounts at XXX-sponsored workshops and the annual statewide conference.
Enhanced communications and advancing the common good.
state policy advocacy and governmental interface
Newsletter
Depending on the level of support, members receive our newsletter, invitations to events, e-mails of our weekly newspaper column, special benefits that may vary
Reimbursement for attending meetings Networking opps Collective lobbying voice Potential future fundraising benefits Increased training opps Informal referral service for conservation professionals
In NY: Eligibility for land trust capacity building and land protection funding as part of \$500,000 annual grants program managed by LTA Northeast Program - 'New York State Conservation Partnership Program.'
Discounts at NE LT Conference Same as National benefits.
Still struggling with that - some mix of communication from XXX, discounts on fees for services, opportunity to help shape program directions
Weekly E-News and Special Alerts. List servers for Land Protection and Stewardship practitioners for the exchange of peer knowledge and experience. Land Protection Resource Centers, a library of publications and documents essential for land conservation work, maintained at 15 locations throughout the state, as well as on our Website. Attorney's Referral Panel of lawyers well-versed in land conservation dealings. Support services for regional meetings of land conservation practitioners. Service Providers Directory of lawyers, accountants, surveyors, biologists, consultants, etc. Public policy work that has gained Land Trusts increased recognition as an important constituency. Co-sponsors the annual Land Conservation Conference.
Newsletters, annual reports, membership renewal solicitations

Appendix E. Population of Service Centers Studied

Appalachia Ohio Alliance
California Council of Land Trusts
Center for Land Conservation Assistance
Colorado Coalition of Land Trusts
Conservation Trust for North Carolina
Connecticut Land Trust Service Bureau
Gathering Waters Conservancy
Georgia Land Trust Service Center
Heart of the Lakes Center for Land Conservation Policy
Indiana Land Protection Alliance
Land Trust Alliance – Southeast Program
Land Trust Alliance - Northeast Program
Land Trust Alliance – Midwest Program
Maine Coast Heritage Trust / Maine Land Trust Network
Maryland Environmental Trust
Massachusetts Land Trust Coalition
New Jersey Conservation Foundation
Pennsylvania Land Trust Association
Putnam Conservation Institute of The Trustees of Reservations
Rhode Island Land Trust Council
Texas Land Trust Council
The Compact of Cape Cod Conservation Trusts, Inc.

Appendix F. Survey Results

(Note that “1” represents the participant being in compliance with the working model component, and “0” represents the participant not in compliance with the working model component.)

ORGANIZATIONAL STRUCTURE

Mission		Governance		Staff Support	Strategic Planning			Continuing Education		Financial Resources							
										1. More than 10% is dedicated to general administration for land trust services.	2. More than 25% of the budget is dedicated to land trust services.	3. Benefits are provided to members.	4. No one land trust contributes significantly more.	5. More than one type of membership.	6. Less than 25% is dedicated to general administration.	7. More than 10% is dedicated to general administration for land trust services.	
1. Primary purpose of organization is to provide land trust services.	2. Land trust services are reflected in the organization's mission.	1. The governing body is a formal Board of Directors.	2. The majority, but not all Board Members are land trust representatives.	1. There is at least one full-time staff person dedicated to land trust services.	1. The organization has a strategic plan.	2. The strategic plan discusses land trust services.	3. The strategic plan is reviewed annually.	4. The strategic plan is being implemented.	1. At least one Board/Staff member/Volunteer or Intern is sent to a land-trust focused training each year	2. Information from conferences is formally presented to other board/staff members.	1. Majority of land trusts are members.	2. More than one type of membership.	3. Benefits are provided to members.	4. No one land trust contributes significantly more.	5. More than 25% of the budget is dedicated to land trust services.	6. Less than 25% is dedicated to general administration.	7. More than 10% is dedicated to general administration for land trust services.
1	1	1	0	1	1	1	1	1	1	1	0	1	1	0	1	1	n/a
1	1	0	0	0	1	1	0	1	1	1	1	1	1	0	1	1	1
1	1	1	1	0	1	1	0	1	1	0	1	1	1	0	1	1	1
1	1	0	N/A	0	0	n/a	n/a	n/a	1	0	1	0	1	0	1	0	1
1	1	1	0	1	1	1	1	1	1	1	0	n/a	n/a	0	1	1	0
1	1	0	0	0	0	n/a	n/a	n/a	1	1	0	1	1	n/a	0	0	0
1	1	1	0	1	0	n/a	n/a	n/a	1	0	1	1	1	0	1	1	0

ORGANIZATIONAL STRUCTURE (CONT'D)

Mission		Governance		Staff Support	Strategic Planning			Continuing Education			Financial Resources						
											1. Majority of land trusts are members.	2. More than one type of membership.	3. Benefits are provided to members.	4. No one land trust contributes significantly more	5. More than 25% of the budget is dedicated to land trust services.	6. Less than 25% is dedicated to general administration.	7. More than 10% is dedicated to general administration for land trust services.
0	1	0	0	1	1	1	1	1	1	0	n/a	n/a	n/a	1	n/a	n/a	n/a
0	0	1	0	1	1	1	1	1	1	0	n/a	n/a	n/a	1	0	1	0
0	1	0	0	1	1	1	1	1	1	0	1	0	1	1	0	n/a	n/a
0	1	1	0	0	1	0	1	1	1	1	0	0	1	1	1	n/a	n/a
1	1	1	0	1	1	1	1	1	1	1	1	n/a	1	1	1	1	0
1	1	1	0	1	1	1	1	1	1	1	1	1	1	1	1	1	0
1	1	0	1	1	0	1	n/a	1	1	1	1	1	1	1	1	1	1
0	0	1	0	1	1	1	1	1	1	0	n/a	1	1	1	1	0	0
1	1	0	0	1	1	1	1	1	1	0	1	0	1	1	1	1	1
0	1	1	0	0	1	1	1	1	1	1	n/a	n/a	n/a	1	1	1	1
1	1	1	1	1	1	1	1	1	1	1	1	0	1	1	1	1	0
1	1	0	1	1	1	1	0	0	1	0	1	0	1	1	n/a	n/a	n/a
1	1	1	0	1	1	1	1	1	1	1	1	1	1	1	1	1	0
1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	n/a	n/a
1	1	1	0	1	1	1	1	1	1	?	1	1	1	1	1	n/a	n/a
16	20	14	5	16	18	18	15	18	22	12	14	11	18	1	17	13	6
73%	91%	64%	23%	73%	82%	82%	68%	82%	100%	55%	64%	50%	82%	100%	77%	59%	27%

LAND TRUST SERVICES

Land Trust Training		Land Trust Technical Assistance				Land Trust Collaboration/Networking				Land Trust General Consultation			
1. Organizes at least one training per year.	2. Organization informs land trusts of outside training opportunities	1. Provides materials that can be distributed to landowners.	2. Provides examples of documents, policies and procedures upon request.	3. Provides names/references of professional services.	4. Provides an inventory/database of land projects in the service area.	1. Provides a directory of land trusts across the state/region.	2. Provides opportunities for land trusts to network.	3. Provides opportunities for land trusts to share information and personal experiences.	4. Encourages and facilitates collaborative opportunities.	1. Keeps land trusts generally informed of public policy issues.	2. Facilitates the development of new and growing land trusts.	3. Offers guidance for land trusts in transition.	4. Offers guidance for land trusts considering a merger.
1	0	1	1	1	1	1	1	1	1	1	1	1	1
1	0	1	1	1	0	1	1	1	1	1	1	1	1
1	1	1	1	1	0	0	1	1	1	1	1	1	1
1	1	0	1	1	0	1	1	1	1	1	1	1	1
1	1	1	1	1	1	1	1	1	1	1	1	1	1
1	1	1	0	0	0	1	1	1	0	1	1	1	1
1	1	0	1	1	1	1	1	1	1	1	1	1	1
1	1	1	1	1	0	0	1	1	n/a	0	n/a	n/a	n/a
1	1	1	1	1	1	1	1	1	1	1	1	1	1
1	1	1	1	1	0	1	1	1	1	1	1	1	1

LAND TRUST SERVICES CONT'D

Land Trust Training		Land Trust Technical Assistance				Land Trust Collaboration/Networking				Land Trust General Consultation			
		1. Provides materials that can be distributed to landowners.	2. Provides examples of documents, policies and procedures upon request.	3. Provides names/references of professional services.	4. Provides an inventory/database of land projects in the service area.	1. Provides a directory of land trusts across the state/region.	2. Provides opportunities for land trusts to network.	3. Provides opportunities for land trusts to share information and personal experiences.	4. Encourages and facilitates collaborative opportunities.	1. Keeps land trusts generally informed of public policy issues.	2. Facilitates the development of new and growing land trusts.	3. Offers guidance for land trusts in transition.	4. Offers guidance for land trusts considering a merger.
1. Organizes at least one training per year.	2. Organization informs land trusts of outside training opportunities	0	0	0	0	0	1	1	1	1	0	0	0
1	1	1	1	1	0	1	1	1	1	1	1	1	1
1	1	1	1	1	0	1	1	1	1	1	0	1	1
1	1	1	1	1	0	1	1	1	1	1	1	1	1
1	1	0	1	0	0	0	1	1	1	1	0	0	0
1	1	1	1	1	1	1	1	1	1	1	1	1	1
1	1	1	1	1	1	0	1	1	1	1	1	1	1
1	1	1	1	1	0	1	1	1	1	1	0	0	0
1	1	1	1	1	0	1	1	1	1	1	1	1	1
1	1	1	1	1	1	1	1	1	1	1	1	1	n/a
1	1	1	1	1	1	1	1	1	1	1	1	1	1
21	19	17	20	19	8	17	22	22	20	21	20	17	17
95%	86%	77%	91%	86%	36%	77%	100%	100%	91%	95%	91%	77%	77%

APPENDIX G. Additional Information Collected From Survey

(The information below has been randomized in each column for confidentiality purposes. Therefore, information across the table does not correspond to one particular organization.)

# land trusts being serviced	year established	# of counties being serviced	approximate budget	% of budget from dues	membership criteria	# half day trainings	# multi day trainings
200	1960	1	260,000	<10%	Interest in land conservation	1	0
120	1967	14	115,000	25-50%	must be 501c3 chartered to hold land and/or interests of land in the Commonwealth of Massachusetts	0	0
50	1980	16	570,000	<10%	payment of dues	1	0
46	1983	26	35,000	<10%	Organizational members (voting members) need to be a non-profit land trust or unit of government that engages in land or water preservation transactions and has met additional criteria as established by CCLT. These criteria include providing certain documents and striving to achieve Standards and Practices	1	0
200	1986	63	250,000	<10%	A land trust is a nonprofit organization that, as all or part of its mission, actively works to conserve land by undertaking or assisting in land or conservation easement acquisition, or by its stewardship of such land or easements.	2	0
55	1990	83	123,200	n/a	n/a	3	0
175	1991	100	\$250,000	<10%	adoption of the national Land Trust Standards and Practices guidelines by board resolution (new 2005 requirement); annual payment of membership dues	3	0
117	1991	254	40,000	10-25%	501c3 status as a conservation organization, in CT.	3	1
25	1994	?	320,000	10-25%	501c3; land acquisition must be one of its objectives	3	1
140	1994	?	107,000	n/a	n/a	3	1
100	1995	?	1.5M/150,000	25-50%	Any donor to MCHT is a member of MCHT. MLTN members are all land trusts by design (others can support MLTN by donating to MCHT and directing their gift)	3	1

# land trusts being serviced	year established	# of counties being serviced	approximate budget	% of budget from dues	membership criteria	# half day trainings	# multi day trainings
40	1998	10co./entire state	400,000		payment of dues	4	1
53	1999	12 states	700,000	0	N/A government organization supports the council.	5	1
80	2000	23 + one city	30,000	<10%	Charitable organization doing substantial work in advancing the cause of land and water conservation	5	1
	2001	29co	100,000	10-25%	active land conservation operations in Michigan. also have affiliate memberships for non-land trusts.	8	1
24	2002	351 towns	1mill	<10%	\$35 per year minimum if you're talking about CTNC members. If you're talking about Land Trust Council membership, there are a bunch of criteria laid out in the LTC bylaws.	12	1
35to40	2004	39 munic.	2.5mill	0	Individuals or other entities who give a gift within the period of a year.	1+	1
16	2004		200	more than 50	LTA member 501(c)3 corporation Adapted(ing) LTA S&P's	3 to 10	1
95	1891/2003	entire state	\$800,000	<10%	Same as LTA criteria for membership, including 501(c)3 status, conservation mission, adoption of Land Trust Standards & Practices.	4 to 6	2
2	1970/1995	entire state	<5,000	n/a		5 to 10	3
45	1982/2000	n/a	80,000	n/a		6 to 8	1 to 2
50		parts of 11 states	150,000	<10%	support for concept of land conservation and willingness to pay?	8 to 10	2 to 3

Acknowledgements

I would like to thank all of my family, friends, and colleagues that have supported me throughout this adventure. From the brainstorming stages to analysis and final edits, everyone has given me unconditional support. I would like to send a special thanks to my initial research committee: John Bernstein, Renee Kivikko, Chuck Roe, and Carolyn Vogel for all of their ideas, support, and advice. I would also like to thank Karen Bassler, Erin Culbert, Kris Larson, and Marla Wilson who were also a great support during the development and final edits of my paper. I truly appreciated everyone's willingness to read my paper and provide feedback in the final stages of revision.

Most importantly, I would like to thank all of the service center organizations throughout the country for their willingness to participate in this research, their patience in explaining the many intricacies of their organizations, and their overall support of my work. It has been an honor to work with some of the greatest conservation leaders throughout the country, each of which are on a mission to build a stronger and more sustainable land trust community during these times of significant growth and dire need for private land conservation.

I would also like to thank professors Howard Balanoff, Patricia Shields, and Hassan Tajalli at Texas State University for their open mindedness and genuine interest in this unique research topic, and alumni Michelle Romero for being my second reader. They each played a significant role in making this project happen, including a grant to travel to Washington D.C. to present my research topic, talking in circles with me until a framework presented itself, and simply supporting my work through the final hours. This project has been an incredible learning experience for me, personally, academically and professionally.

I hope that this work will help set the stage for ongoing conversations throughout the service center community about how we can strategically build a comprehensive delivery system for training and technical assistance throughout the country. It has been a great experience working with everyone, and I look forward to staying involved in the land trust and service center community for many years to come.