ENGAGING LANDOWNERS IN CONSERVATION

A Complete Guide to Designing Programs and Communications

TOOLS FOR ENGAGING LANDOWNERS EFFECTIVELY

PREFACE

If you're reading this, you already understand how important it is to engage family landowners in efforts to nurture and sustain our natural resources. Individuals and families own more than a third of the forestland and almost all of the farmland in the US. Persuading these individuals and families to be good stewards of their land is essential for sustaining rural communities, preserving biodiversity, keeping our air and water clean, and enhancing the natural beauty and recreational amenities that so enhance our quality of life.

This is not an easy task. While many government agencies and conservation organizations offer services to landowners, few are able to engage landowners in a way that leads to actions on the ground and sufficient impacts on the landscape.

The Sustaining Family Forests Initiative (SFFI) has been working on this challenge since its inception in 2004. SFFI is a partnership of the Yale School of Forestry & Environmental Studies (FES), the Center for Nonprofit Strategies (CNPS), and the United States Forest Service's Family Forest Research Center. Our flagship program—Tools for Engaging Landowners Effectively (TELE)—is grounded in social science research and draws on marketing and program planning tools and techniques to develop outreach programs that yield meaningful results on the ground. To date, TELE techniques have been taught at more than 50 workshops to more than 1,400 professionals from 400 organizations. We have also worked directly with forestry, wildlife, and conservation organizations throughout the US to improve stewardship on the ground through better landowner engagement. We have learned a tremendous amount about how landowner outreach is done, what the challenges and pitfalls are, and how some of these challenges can be overcome.

We wrote this book to introduce you to the TELE approach and provide a detailed "how to" guide so you can implement these new ideas and approaches. Although it draws on the theory and principles of social marketing, it is primarily intended as a reference guide for practitioners. It will show you how to make small and large changes that will help you reach more landowners and compel them to take appropriate stewardship actions, even if you are strapped for time and resources. It will teach you how to create motivation, thus reaching beyond landowners who already take the initiative on conservation actions. Finally, it will help you change landowner behaviors at a scale that can bring positive changes to the landscape.

This comprehensive guide draws on the experiences and expertise of a number of different contributing authors who have been using, testing, and refining TELE techniques for years. Mary Tyrrell of FES, then program director of SFFI, inspired and instigated this book. Content was contributed by members of the SFFI team and staff of the Aldo Leopold Foundation. I deeply appreciate the enthusiasm, knowledge and thoughtfulness, each of the authors brought to this project, as well as their willingness to allow me to modify and adjust their chapters to construct a comprehensive and coherent guide. Finally, a big Thank You to Cassidy Dellorto-Blackwell of FES, who helped with reviewing and organizing the content and producing this resource.

Purnima Chawla,
Center for Nonprofit Strategies, Editor

Sustaining Family Forests Initiative   Yale SCHOOL OF FORESTRY & ENVIRONMENTAL STUDIES   Center for Nonprofit Strategies Clear Actionable Advice.   FOREST SERVICE U S DEPARTMENT OF AGRICULTURE   THE ALDO LEOPOLD FOUNDATION

TABLE OF CONTENTS

1 A NEW OUTREACH PARADIGM

Purnima Chawla

The Problem

Families and individuals own 36 percent of the forestland in the United States.[1] Their participation is essential to accomplishing any forest management or conservation impact on the landscape. They are, therefore, critical partners in maintaining America's woods and wildlands and in achieving national goals ranging from fire resilience, to clean water, to thriving rural economies.

Research on landowners suggests that most family woodland owners want to be good stewards of their land.[2,3] But this stewardship value is often not translated into effective stewardship actions to help maintain the health and productivity of their land.

Despite a substantial investment in landowner-oriented programs, four in five landowners are not getting any management advice, and about two-thirds are not engaged in traditional forest management activities and programs.[4] This suggests that both outreach programs and messages about land stewardship are out of step with landowners' needs, attitudes, and preferences. Natural resource professionals—federal and state forestry and wildlife agencies, conservation nongovernmental organizations, wildlife organizations, land trusts—need better ways to successfully engage landowners and promote good stewardship on private land.

The Solution: A Paradigm Shift

This book outlines a new way to conceive, design, and implement outreach to landowners. The main elements of the proposed paradigm shift are described below and summarized in the following table.

Although many public sector agencies characterize landowner outreach as an educational offering, in practice, information and services are usually offered with the goal of inspiring landowners to make good stewardship decisions. Therefore, it makes sense to design outreach programs with desired stewardship decisions and actions in mind. This *action orientation* starts with setting clear goals for what changes we want to see in the landscape and then translating them into desired landowner actions. It also demands that we think of our program results in terms of meaningful *outcomes*, such as landowners' actions, rather than outputs (such as number of workshops conducted).

Education alone is not enough to get people to take action. Educational outreach provides direction; it tells people what to do and how to do it. It works well for the small proportion of landowners who are already oriented to taking action on their land, but it doesn't do enough to motivate the vast majority of landowners for whom stewardship actions are not such a high priority. This book uses techniques of *marketing* to help natural resource professionals engage with more landowners and motivate them to be good stewards. The main difference between educating and marketing is that marketing includes

1. Brett J. Butler, Jaketon H. Hewes, Brenton J. Dickinson, Kyle Andrejczyk, Sarah M. Butler, and Marla Markowski-Lindsay, "Family Forest Ownerships of the United States, 2013: Findings from the USDA Forest Service's National Woodland Owner Survey," *Journal of Forestry* 114, no. 6 (November 2016): 638–647, https://doi.org/10.5849/jof.15-099.
2. Kyle Andrejczyk, Brett J. Butler, Mary L. Tyrrell, and Judith Langer, "Hansel and Gretel Walk in the Woods: A Qualitative Examination of the Language Used by Family Forest Owners," *Journal of Forestry* 117, no. 1 (January 2016): 52-57.
3. Miriam L. E. Steiner Davis and J. Mark Fly, "Seeing the Landowner through the Trees: How Non-Participant Private Forest Landowners Experience Their Land—A Phenomenological Investigation" (Proceedings of Conference on Human Dimensions of Family, Farm and Community Forestry International Symposium, Washington State University, Pullman, WA, March 1-April 1, 2004).
4. Brett J. Butler, Jaketon H. Hewes, Brenton J. Dickinson, Kyle Andrejczyk, Sarah M. Butler, and Marla Markowski-Lindsay, "Family Forest Ownerships of the United States, 2013: Findings from the USDA Forest Service's National Woodland Owner Survey," *Journal of Forestry* 114, no. 6 (November 2016): 638–647, https://doi.org/10.5849/jof.15-099.

motivation and persuasion. It calls on you—the communicator—to provide the needed motivation and support for the desired actions.

Marketers tap into people's values and emotions to give them compelling reasons to take a desired action. Marketers then provide the needed support to reduce barriers and increase the probability that their audience will take action. Marketing requires the marketer to understand their audiences and be oriented to *their* needs and values. In this book, we show you ways to make your programs and your communications more *landowner centric*, i.e., aligned with landowners' needs rather than your organizational priorities and processes.

The methods we describe are based on a *targeted marketing* approach, which involves designing programs to persuade a specific group of people to take a specific action. It differs from general, broad-brush outreach in that it seeks to reach and persuade smaller groups of people with messages that are specific to their needs and preferences and feel more personal and relevant to them.

We also recommend organizing your outreach as a series of *planned, focused efforts* in a particular region and with a particular audience. Engaging landowners requires intensive effort, which most organizations are not equipped to maintain over long periods of time and across broad geographies. The best way to accomplish meaningful results with limited resources is to break up broad, complex goals into bite-sized objectives and address each of them in a focused manner.

The final change we recommend is using tracking and evaluation to improve outreach. We encourage you to adopt a learning mindset and think of every outreach effort—a workshop, a direct mail campaign, or a media placement—as an experiment that can guide and inform future efforts.

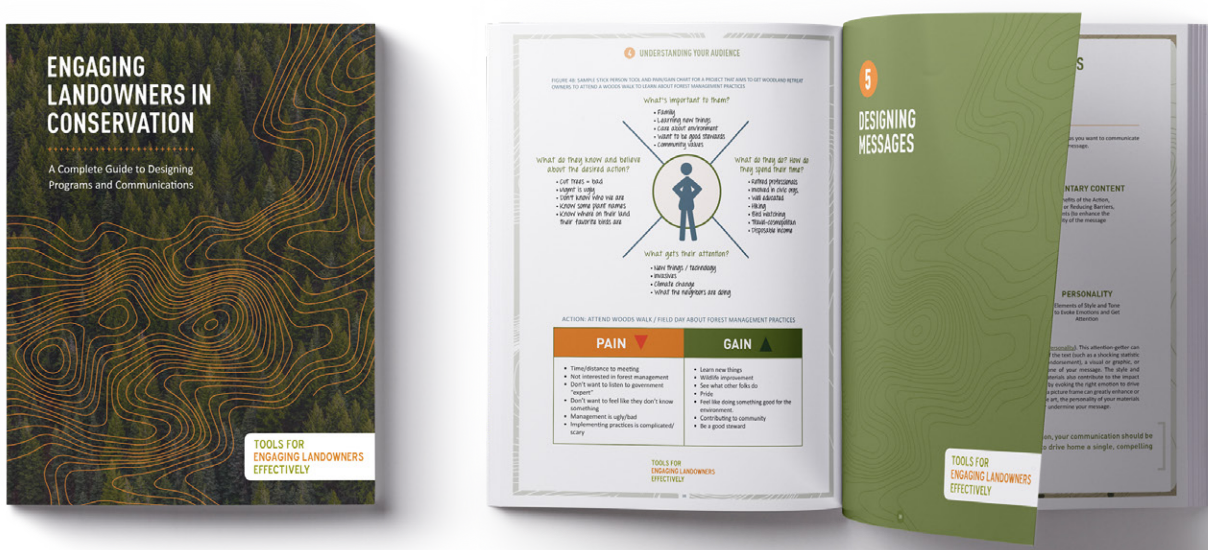
TABLE: ELEMENTS OF THE PROPOSED CHANGES IN LANDOWNER PROGRAMMING

FROM...	TO...
• Education orientation	• Action orientation
• Outputs-based planning and metrics	• Outcomes-based planning and metrics
• Knowledge-focused outreach	• Persuasive, motivational communication using principles of marketing
• Organization-centered outreach	• Landowner-centered outreach
• Broad-brush marketing: trying to reach everyone	• Targeted marketing: reaching specific groups of people in targeted ways
• Repetitive, ongoing outreach	• Focused efforts over a defined time period and geographic area
• Accounting mindset: Post hoc evaluation of each outreach effort to report on outputs and outcomes	• Learning mindset: Integrating tracking and evaluation over multiple efforts to inform future work

How to Use This Book

This book is designed to be a reference manual for practitioners. It consists of a series of short sections, each of which is an independent article that addresses a particular step or aspect of landowner outreach. You can read these sections in sequence to understand the whole process, or you can consult individual sections to get advice on a particular topic.

Throughout the book, concepts and principles are illustrated with examples, many of which are drawn from our work in the field. Since Tools for Engaging Landowners Effectively (TELE) was initially developed for forestry professionals, many of these examples are drawn from forestry. However, TELE techniques can be applied to a much broader range of landowners and landowner actions. TELE has been used to promote Firewise actions in the wildland urban interface, agroforestry practices among farmers, and conservation easements. It has also been used to develop messages for coalition partners, legislators, and the general public.



2

SETTING GOALS AND OBJECTIVES

2 SETTING GOALS AND OBJECTIVES

Katherine Hollins and Purnima Chawla

2.1 Defining Project Goals

PROJECT DRIVERS

Whether you're developing a new project or trying to improve an existing one, establishing clear goals helps you to focus your energy and resources. To identify these goals, you'll need to consider (1) what needs to happen in your target landscape, (2) your organization's mission and expertise, and (3) available funding.

FIGURE 2A: A GREAT PROJECT GOAL LIES AT THE INTERSECTION OF LANDSCAPE NEED, YOUR ORGANIZATION'S MISSION AND EXPERTISE, AND AVAILABLE FUNDING.

1. Landscape need. You're well acquainted with your region. What needs to be happening? Maybe unrestrained development is fragmenting natural areas, an endangered species is on the brink, a new invasive species is creeping in, or nonpoint source pollution is threatening water quality. You know what the important issues are in your region. Keep those front and center as you think about what problem you'd like to address via this project.

2. Organizational mission and expertise. Next, pair that landscape need with your organization's mission and expertise. What does your organization do well? Maybe you protect land under conservation easements, or you help landowners manage their land well. Whatever you do, it is likely that you can find a way for your work to address the landscape need.

It's important not to try to take on something new or make it fit just because there's a need for it in your area. If farm runoff is a big issue in your area, but you have no experience with farmers or agriculture, you're likely to waste time and effort making mistakes and getting up to speed. Instead, find a partner who has the needed expertise (see Section 3.1: Identifying Potential Partners), or find a different way to improve the landscape using the skills and resources you already have.

On the flip side, it's also important not to keep doing what you're doing if there is little need for it. For example, if forest cover is at an all-time high in your area, your efforts to promote tree planting may be misplaced. Instead, it makes sense to channel your organization's energy toward other needs, such as controlling invasives or planting more valuable species.

3. Available funding. For most of us, the projects we undertake are bound by available funding. In the world of conservation and land management, available funds are influenced by grants, donors' preferences, or organizational priorities. For government agencies, on-the-ground outreach is often tied to the goals of existing programs, such as the Forest Stewardship Program, or cost-share programs.

We encourage you to think creatively to seek the overlap between an easy-to-fund activity and the landscape need you are trying to address. Are people excited about the new whisky-barrel business blooming in your region? Maybe you can leverage that excitement into funding better forest management. Is donor interest in your long-standing invasive species management program waning? You might be able to revive interest by taking a different tack, for example, mentoring students or creating job opportunities for ex-prisoners. (Of course, you should do this only if you have the organizational expertise or partners to actually deliver on those mentorships or job skills!)

Identifying a meaningful, yet achievable, project goal involves finding and amplifying areas of overlap among landscape needs, your organization's mission and expertise, and funding opportunities.

PROJECT PARAMETERS

While it is good to think comprehensively about landscape needs and how to address them, it is equally important to narrow huge challenges down to manageable, achievable goals commensurate with your resources.

Your ability to change landowner behavior to achieve landscape goals is limited by many factors, including staff capacity, duration of the program, equipment, or maybe even your ability to follow through with interested landowners. Setting parameters for your outreach effort will help bring focus to the project so you can have an impact. It is much harder to make meaningful and demonstrable progress if you are working in a scattershot manner or resources are spread too thin. So carve out what part of the problem you can reasonably tackle. This might mean focusing on a specific geography (e.g., a particular watershed or selected counties) or on a particular aspect of the overall challenge.

Here are a few examples.

Southeast Longleaf: Many partnerships form around a particular threatened species or at-risk habitat. However, maps of historic ranges or proxy species can still leave partners wondering where to focus their efforts. The Longleaf Alliance uses a combination of many relevant landscape characteristics to narrow the focus of their partnership efforts. Depending on the needs of the specific local partnership, they overlay other conserved lands, existing stewardship efforts, infrastructure that may impact prescribed fire applications, partners' other priority areas, possible corridors, or ground-cover characteristics. Rather than spreading resources across the entire historic range, their partnerships focus on areas where their work is likely to have the biggest and longest-lasting impact.

New England Land Trusts: The MassConn Sustainable Forest Partnership learned through experience to focus its outreach on larger landholdings. The MassConn Woods outreach partnership (which includes the American Forest Foundation and New England Forestry Foundation) started with outreach to all landowners who owned 10 or more acres. This strategy was fine for an offer of a free book, but when the project began offering expert visits to landowners, partners soon realized that local land trusts had limited capacity and were unwilling to work with landowners with small acreages. In subsequent mailings, MassConn made sure to specify a minimum acreage as one of its parameters when offering a land trust contact or forester visit.

Great Plains Windbreaks: Charged with reducing the damaging effects of unabated wind across the plains, the Kansas Forest Service chose to focus on improving windbreaks that were in fair to poor condition in the western part of the state (as identified by the GIS imagery shown below). The western third of the state was chosen because that region had the most windbreaks in poor or fair condition. The forest service staff chose to focus on improving those windbreaks, rather than planting new windbreaks, because they believed repair was an easier ask of landowners and the likelihood of success was greater. The staff also felt that better functioning windbreaks in the region would pave the way for a future campaign focused on windbreak installation.

FIGURE 2B: GIS ASSESSMENT OF ONE COUNTY WITHIN THE LARGER PROJECT AREA SHOWS WINDBREAKS IN GOOD, FAIR, AND POOR CONDITION

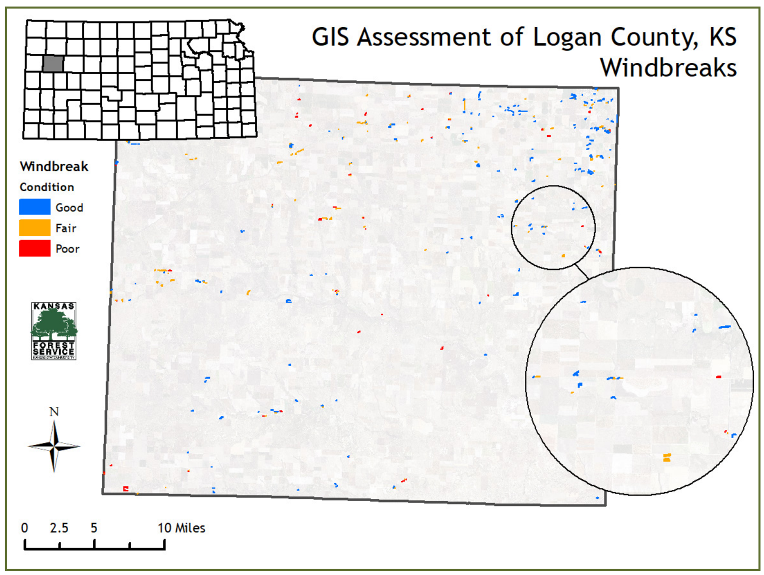


Image courtesy of Kansas Forest Service

> When the ecological issue you're addressing is complex and widespread, and your resources are limited, focus your resources on a smaller geographic area or a particular aspect of the problem to have a meaningful impact.

2.2 From Project Goals to Landowner Actions

The first step toward effective landowner outreach is to be clear about what change you want to see on the ground. Once you have articulated your program goal and established reasonable parameters (see Section 2.1: Defining Project Goals), then you can identify what it is you want landowners to do in response to your outreach or intervention.

The connection between your program goals and desired landowner actions is not always easy and direct. Almost always, desired landscape changes can be achieved through different types of landowner actions. For example, if your program goal is to improve water quality in a critical watershed, this can be achieved by asking landowners to do any of the following actions:

- Remove invasive plants that contribute to increased runoff
- Plant riparian buffers or improve existing buffers
- Use best practices related to roads and culverts when conducting a timber harvest
- Reduce inappropriate use of chemicals and fertilizers
- Prevent development on their land

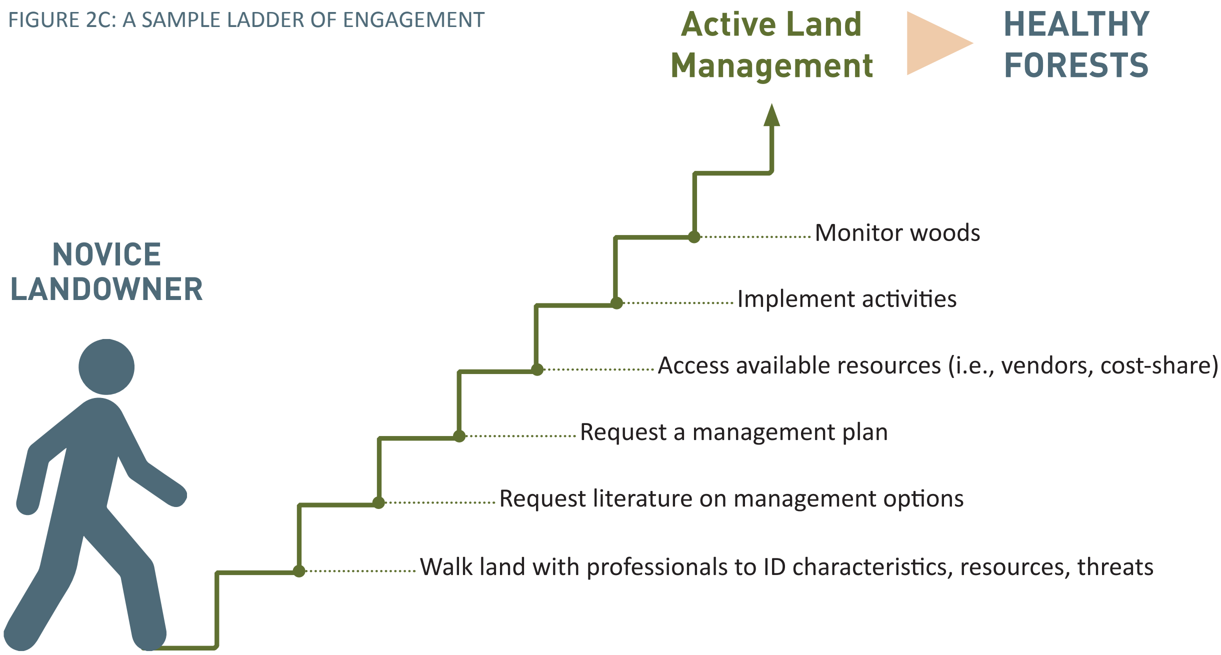
These actions may have different levels of applicability and attractiveness for different landowners, and they may have different levels of impact on your program goal. You may want to choose an action that is easier, or one you think landowners will be more likely to take, so you can engage a broader set of people. Alternatively, you may choose an action that is the most vital for reaching your landscape goal, although it might be very challenging and less widely adopted.

Once you have selected a landowner action that you want to pursue, you will need to break it down further. Any action you ask landowners to take almost always involves a series of steps, and depending on their current level of knowledge and engagement, some landowners may feel overwhelmed by stewardship actions or feel the actions are irrelevant. As communicators, it is our job to meet landowners where they are and help them move toward better stewardship one small step at a time. In many cases, this means starting with "gateway" actions (such as asking landowners to seek more information or contact a professional and then moving on to simple stewardship actions and, perhaps, periodic contact with forestry professionals). Finally, as landowners' trust, confidence, and commitment grow, they may be open to bigger investments that yield higher conservation values.

All these considerations can make it difficult to articulate a clear and specific ask of landowners. The Tools for Engaging Landowners Effectively (TELE) method uses a tool called the Ladder of Engagement to help you think critically and systematically about what you want landowners to do and to determine how you will engage them to achieve your conservation or management goals.

> Any landscape challenge can be addressed by a range of actions, which have different relevance and attractiveness for landowners. Getting landowners on the path to stewardship often involves starting with actions that they are able and willing to take.

FIGURE 2C: A SAMPLE LADDER OF ENGAGEMENT



THE LADDER OF ENGAGEMENT

The Ladder of Engagement is a pictorial depiction of the steps and actions that you want landowners to take so you can accomplish your conservation or management goals.

The sample ladder above shows the steps a landowner might take to become a "model landowner" who is actively managing their land, thereby contributing to your goal of improving forest health. Clearly, it is unreasonable to expect landowners to jump from knowing nothing about forest management (novice) to being a model owner who implements management practices, monitors their impacts, and adjusts as needed. In the example above, the novice landowner starts by learning something about their land and thinking about how they want to use it. They then may request a management plan and access resources to help them implement recommended management activities. Only then do they actually begin managing their land (which still might involve learning new skills, getting equipment, or figuring out how to hire a contractor).

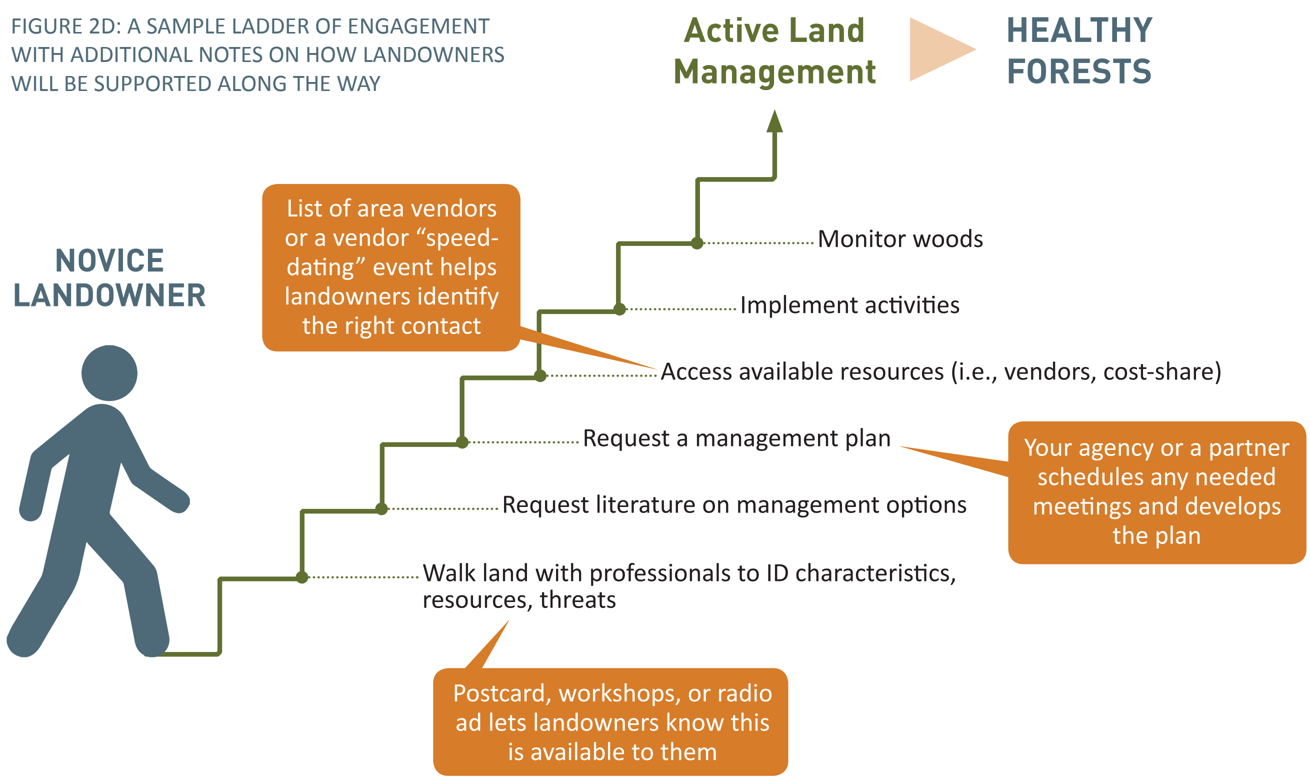
The purpose of outlining this Ladder of Engagement is to help you think through different engagement pathways and articulate a clear ask of landowners at different steps of the process. Not all landowners will take the exact same path. Some landowners may learn about management options through a different mechanism or want to learn about cost-share opportunities before they get a management plan. Perhaps some landowners will skip a step here or there, or some of the steps will need to be repeated. Nevertheless, it is useful to think about what path you ideally want them to take and describe all the steps along that path. There are always other options available to people, but knowing the most typical and desired pathway will help you focus your outreach and get more people moving down that path. Outlining the steps helps to ensure that you are setting reasonable expectations for landowners along the way.

Once you have fleshed out a ladder (see box: Tips for Developing a Ladder of Engagement), you can identify landowners' current levels of readiness regarding the action you desire and pinpoint the focus of your outreach efforts. For example, if most landowners in your area are already familiar with their own forest resources, then you might start engaging with them by offering a workshop on forest management options. However, if most landowners are further down the ladder, you may need to start with a simple woods walk to help them understand their woods better. Conversely, if many landowners in your area already have management plans, it may be more efficient to invest your outreach resources in motivating them to implement planned activities.

Outlining the Ladder of Engagement also helps you recognize that landowners need support to get from where they are to where you'd like them to be. The ladder also helps ensure that you are providing needed resources and support at each step along the way. In our sample ladder below, for instance, landowners may not know that there are professionals available to help them learn about and set goals for their land. Landowners will also need to work with a professional to develop a management plan; you might want to provide that service yourself or refer them to other vendors. Finally, landowners may need assistance in identifying vendors to implement treatments on their land.

Outlining your Ladder of Engagement allows you to set milestones and metrics to track landowner interest and engagement at different steps of the ladder (see Section 8.2: Selecting Metrics and Collecting Data). For example, your outreach efforts may persuade 100 novice landowners to request a walk with a forester. However, only half of them may choose to go the next step to meet with a professional to request a management plan. Another check might reveal that only a third of those who have a management plan actually conducted the recommended activities. Noting where and how attrition occurs can help you understand how many landowners you need to reach to achieve your goals and where and how you need to offer landowners more incentives, motivation, or support to keep them engaged.

FIGURE 2D: A SAMPLE LADDER OF ENGAGEMENT WITH ADDITIONAL NOTES ON HOW LANDOWNERS WILL BE SUPPORTED ALONG THE WAY



Breaking down the desired landowner behavior into specific actions reveals the complexity of what you're asking landowners to do and reminds you to offer needed information, services, or referrals to help translate landowners' good intentions into meaningful actions.

TIPS FOR DEVELOPING A LADDER OF ENGAGEMENT

The following tips will help you outline a clear path of landowner actions that will ultimately help achieve your landscape goal. You can then use the outline to see where landowners may need assistance, and your programming can support them to take the next step.

- Rather than beginning by writing down the actions of a novice landowner and working your way up toward a model landowner, it's often easier to start by thinking about the actions you believe a model landowner would take to help address your conservation goal. Then, work backward, identifying what a landowner would need to do before undertaking the action you just wrote.
- Break down the actions into smaller specific steps. For example: "Remove invasive species" involves learning to identify them, learning how to remove them, getting access to the right equipment, etc. "Sign up for cost-share" entails checking eligibility, filling out the form, having the form signed by a forester, having the form signed by the Natural Resources Conservation Service, waiting for the application to return, doing the work, asking for reimbursement, etc.
- For each step, focus on what you want the landowner to do (not on what you want them to think or what you will do). Make the steps concrete—i.e., something you can see. Use action words. For example: Instead of "care about water quality," say, "attend a workshop to learn about how the health of the watershed affects them." Instead of "understand forest regeneration," say, "meet with a professional to learn about their forest's regeneration prospects."
- Identify alternative paths (i.e., do-it-yourself versus hiring a contractor).
- Identify steps you can eliminate. For example:
    - Do they need to understand your project or funding? (The answer is almost always "no.")
    - Can you assess their property instead of having them do it?
    - Must they travel to two offices to get the necessary signatures?
- Determine what assistance you'll need to provide landowners at each step of the ladder, and who will provide it.
- Determine the first step you want landowners to take—i.e., what you'll ask them to do in your first communication with them. This should be a relatively simple action that the landowner is able to take and that you can persuade them to take without much education and preparation. In fact, attending your educational session may be the first step you want landowners to take to enter your program.

2.3 Choosing SMART Objectives

Social science research tells us that simple, clear, and specific calls to action are much more likely to result in action than broad, confusing, or multi-step requests. You can use your Ladder of Engagement to select one landowner action to be the focus of your outreach. Choosing this action involves identifying a clear, simple answer to the question: What should the landowner do in response to my outreach?

The attributes of a good call to action are nicely captured in the acronym “SMART.”

Specific

Make sure that your communication objective is expressed as a concrete and clear landowner action. Ideally, you should ask landowners to take a simple, observable action. One way to know whether you have a specific objective is to ensure that the action would be interpreted in the same way by any observer.

Measurable

Good communication objectives can be logically tied to relevant indicators and measures of success. This allows you to track progress, and know what’s working well and when you need to recalibrate your efforts. If you have a specific, observable objective, you can usually find a way to count instances of the behavior and track progress against your goals.

Attainable

Good objectives are ambitious but realistic. Ask yourself: Can landowners reasonably be expected to take this action? Do they have access to information, vendors, money, or other resources needed to do what you’re asking? Don’t waste resources on a program that you know is likely to fail.

Relevant

Your communication objective should also be relevant for accomplishing the outcomes you want to see on the ground. It’s important to ask yourself: Is this communication objective worth accomplishing? Does it get me at least part of the way toward the outcomes I want to see on the ground? And do I have a plan for taking landowners the rest of the way, so I can actually see outcomes on the ground?

For example, many conservation partnerships host woods forums to facilitate information exchange and networking among woodland owners. In some cases, that is a worthwhile goal in itself. But if you want to accomplish specific conservation goals, you need to think through the needed steps and actions to get there. What would you like landowners to do after they leave the event? You can build this into the agenda so that there is a clear next step.

Time bound

Set realistic milestones for your program and when you hope to achieve them. At the end of that period, take stock of what you’ve accomplished and decide whether to continue the current outreach or perhaps change your focus to sustaining relationships and moving people up the Ladder of Engagement.

Also, make sure all stakeholders (including funders) are on board with your timeline. Too many effective communication programs are discontinued before the effort bears fruit. An equal number of ineffective programs continue, in the false hope that they will yield results at some point.

3

WORKING WITH PARTNERS

TOOLS FOR
ENGAGING LANDOWNERS
EFFECTIVELY

3 WORKING WITH PARTNERS

Katherine Hollins

3.1 Identifying Potential Partners

Partnering with organizations working toward the same goals can be quite powerful. Each party brings their own area of expertise and resources, and often, you can build efficiencies by coordinating work or dividing work according to skills, resources, or location. The first step toward building a successful partnership is thinking carefully about whom to include.

A good starting point is to ask yourself: Who else is working on similar issues in your region? A watershed group? A state agency? Scouts? A hiking or mountain biking club? A land conservancy? A school or volunteer association? Think about all the people who live, work, or play in your project area and who might be invested in the health of its natural resources.

Also, think about who already has relationships with the landowners you seek to engage. Who has funding for this sort of work? Who has the ability to track efforts and progress? Are there regulatory agencies that may play a role (e.g., issuing permits, providing tax abatement or cost-share)? As you gather more potential partners, check in with them for suggestions of other folks who should also be engaged.

Let's say you're working to make sure that timber cuts on private lands are done in a sustainable manner. State natural resource agencies and University Extension are likely go-to partners because this work aligns with their organizational missions. Local birding or hunting groups may be interested because the project will help ensure healthy habitats for the birds and animals they love (to watch or hunt). Perhaps a watershed organization would get involved because unsustainable timber cuts often also result in more erosion issues. Industry may even be interested in investing in this work because they want to maintain their local supply chain.

In another example, perhaps you own a nature preserve but need help maintaining it. Would a nearby high school be interested in a service-learning opportunity? Does the local community's business association view the preserve as a town asset it would be willing to support? Does the historical society view it as helping to preserve the historic character of the area? Think about how your goals might overlap with theirs.

Once you have identified all potential partners, start to narrow down the list. You don't have to (and usually shouldn't) partner with everyone who is able and willing to help you. If an organization's mission does not fit with the project goal, if they are overstretched with other activities, or if they want you to alter your project goals and parameters in ways that would dilute your impact, save that relationship for another day. Not everyone needs to be a partner on every project. Having too many partners, or the wrong partners, can lead to sluggish progress, mission creep, and spoiled relationships (that may have been fruitful in a different context). Remember, someone has to set up all of those conference calls and meetings. Don't give yourself a headache by inviting more partners than actually needed. There will be opportunities for more partnerships in the future.

Don't invite people into your partnership if you aren't prepared to listen to them and incorporate their perspectives and concerns. On the other hand, don't be afraid to invite people into your partnership because you think they have different views from you; they may be the most important link for ensuring your goals are achievable. If an organization is crucial to your effort but doesn't have the resources to participate, see if you can support or incentivize them by contributing toward their time and travel expenses.

Finally, if your project has (or even seems to have) a negative impact on an organization or group, it is important to engage with them early in the process. The group may or may not be a formal member of your coalition but should be invited into the process. In this way, their needs can be heard, and they can contribute early to solutions that will work for them.

For example, the Watershed Agricultural Council (WAC) works with loggers in the New York City watershed to encourage the use of water quality BMPs during logging operations. Rather than a regulatory approach, WAC uses a voluntary system in which loggers receive the financial incentives and technical support they need to use BMPs. Now WAC is seeing greater implementation rates, is regularly invited to plan harvests in advance with loggers, and inspects the sites when harvesting is complete. If WAC hadn't worked directly with the loggers, it would have been hard to know how to achieve these gains.

Keep in mind that you don't get to choose your partners; you only get to invite them to join you. Each participating organization will need to see the value in spending time and effort working toward the partnership's goals and may not be willing or able to participate at the level or in the ways that you desire. Partner organizations may get different immediate benefits from participating in your project (e.g., more access to biking trails, new ideas for science fair projects, opportunity to voice concerns about proposed actions), but solid, long-lasting partnerships are usually built on a deeper commitment to the overall goals of the project and alignment with each other's missions.

When identifying partners, a good rule of thumb is to include as many organizations as you need, but no more. Think broadly and creatively about who might be good to partner with, but think critically and strategically when actually setting up the partnership.

3.2 Framing the Partnership

Partnerships, coalitions, and collaboratives come in all sizes and vary in scope, depth, and timeframe. This section provides some ideas about how to structure your partnership in a way that is appropriate for your project and manageable for your organization and your partners.

First, it is important to understand that you don't always have to build a coalition to accomplish your goals. If the challenge you are addressing is relatively focused, well-defined, and time-limited, and if your organization has the capacity to deliver the outputs and outcomes, it may be more efficient to work alone. The structure of the project can then be aligned with your organizational structure, and project activities can be aligned with your regular work. In this context, you will also have the ability to measure outcomes and use and report the data as needed. You can still invite other organizations to participate in your work as appropriate and in an ad hoc way (for example, by asking a partner organization to send a speaker to your meeting or to publicize the event through their network). These opportunities to support each other can be mutually beneficial, but they are not strategic partnerships (although they may set the stage for more coordinated efforts in the future).

Sometimes, however, involving partners at a more strategic level can greatly enhance your project and may even be necessary to accomplish your conservation goals. This may be the case when:

- The issue you're addressing extends beyond your agency's jurisdiction and you need to partner with another agency to achieve your goals.
- You need partner organizations to provide financial assistance, technical assistance, or products and services to enable landowners to take the actions you're promoting.
- You are trying to reach a new and unfamiliar audience and need the local knowledge and networks of your partner organizations.
- You simply do not have sufficient capacity and resources to conduct your program at the scale needed to have an impact.

Partnership structures can range from informal agreements to remove invasive species along a shared boundary to formalized arrangements in which organizational lines become fluid, with staff helping across organizations and audience information and tracking data housed in a shared location. Organizing collaborative efforts is easier when the roles that partner organizations are asked to play are well aligned with their existing work responsibilities and directly advance their own goals. Partnering becomes more difficult when you ask partner organizations to alter their operations or priorities to help achieve specific collaborative goals. Deeper levels of collaboration require more coordination management, more organizational commitment, a significant focus on relationship building and communication, and a willingness to permit decision-making to occur within the collective. However, these deep collaborations also have the potential for much greater impact and are necessary for addressing certain kinds of complex, multi-dimensional, and multi-jurisdictional conservation challenges.

It is useful to think of the depth of your collaboration along a continuum (see next page). No point on the continuum is better or worse than the others; the important thing is to find the level of collaboration that fits the scope of the problem and capacity and motivation of the partners involved, and to align roles and expectations accordingly. You can also be flexible, deepening or lessening engagement as the project progresses, or working more closely with some partners than others.

Partnerships entail different levels of engagement and alignment. As a general rule, deeper partnerships have greater potential for impact but also require more management time, effort, and skill. It is important to set up your partnership in a way that suits project goals and matches your organization's investment in building and managing the coalition.

TABLE 3A: COLLABORATION MODELS ON A CONTINUUM

	LESS COLLABORATION	→	MORE COLLABORATION
	Working Alone (with ad hoc support from other organizations)	**Working Together to Implement a Project**	**Forming a Partnership to Address a Complex Issue**
Nature of the Problem	Suited to address problems that are focused and well defined, and the lead organization has the skills and capacity to deliver meaningful results.	Works when problems are focused and well defined but partner skills and resources, or cross-jurisdictional efforts, are needed. Partners must coordinate actions to deliver meaningful results.	Needed when the issue is not well defined or is a set of interrelated cross-jurisdictional problems. Many partners must take complementary actions to deliver meaningful results.
Project Objectives	The project objective is set by the lead organization and it addresses their mission.	The project objective is set by the lead organization but aligns with participating organizations' missions.	The partnership's objectives are determined jointly to address a landscape-level need.
Partners' Obligations	The lead organization requests specific help as needed, and partners provide help as they are willing and able.	Partners commit to making some contribution to the project. These contributions usually involve altering their existing activities to increase impact through coordination.	Partners commit to the objectives established by the partnership and adjust their work to meet them.
Measuring Results	The lead organization tracks results as needed for organizational or grant requirements.	Each organization tracks their own results as needed for organizational or grant requirements. Partners share tracking or summary data with each other as they are able.	The partnership tracks all actions across organizations to assess overall progress and the interactions of different activities. Results are shared with partners to direct future work.
Potential Impact	The impact of the project is limited by the lead organization's jurisdiction and resources.	The impact of the project is limited by the jurisdiction and resources of partnering organizations, with possible efficiencies from coordinated actions.	Efforts by partner organizations interact with and feed into each other, leading to impacts that would not otherwise be possible.
Example	The lead organization supports oak regeneration through landowner workshops and tree giveaways. They make requests to partners to present at events and to use their offices as distribution locations for tree giveaways.	Partners support oak regeneration through cross-boundary management actions that are coordinated to create a larger area of contiguous management. They also coordinate their landowner outreach to focus on this region.	The partnership supports the stabilization of oak habitat by changing how forests are managed in the region across all ownership types. They work to engage all relevant audiences, including landowners, loggers and policymakers, to reach their objectives.

3.3 Choosing Representatives

Once you figure out the level of collaboration you intend to pursue and the organizations you hope will join you, you can think about the management level that will be most appropriate to engage those organizations. The people who know what the issue is, and know what needs to happen on the ground, may not be the people who have the authority to direct an organization's resources or priorities. There are many ways to deal with such a situation, each of which might be more appropriate for different conditions.

FIELD-LEVEL

Sometimes, all you need are more arms and legs (and heads) to implement the program and extend its reach. In that case, it may be simplest to work directly with field staff who can incorporate the program's objectives into their daily work with landowners. These folks also have the best understanding of landowners and other stakeholders in the community, and their input can be crucial for getting the small tactical decisions right—such as where to hold a meeting, what community organizations to approach, or where to place your fliers.

The downside of this approach is that field staff often have little autonomy to set priorities, and they have many competing objectives and metrics to meet. Directly engaging with field staff works best when the partnership support you need is well aligned with their daily work, and/or when they can choose to participate as their time allows. It is also important to secure their supervisors' buy-in for the project and to ensure that these decision-makers understand the project's achievements and their organization's contribution to the effort. Where possible, official support via a memorandum of understanding or similar agreement can give field staff more leeway to make decisions within certain parameters.

EXECUTIVE-LEVEL

In a different case, you may need partner organizations to commit significant concrete resources, provide strategic direction for the partnership, or agree to align their organizational priorities with those of the partnership. In this instance, it may be best to engage senior or executive-level staff who can direct their organization and provide a level of credibility to the partnership. These folks will be interested in large-scale impacts and how their organization can be a leader in addressing the challenge. However, they may not fully understand the details of the issue or particular barriers that field staff may face. Moreover, senior staff are often under pressure to be working on their own organization's core mission and challenges.

When working with this cohort, focus partner meetings on broad, strategic issues and ensure meetings are informative by bringing in speakers to discuss the impacts of the issue or to report on the progress of the partnership. Once the partnership has established a general direction and the partners have committed to supporting the project, institute working groups that engage mid-level staff in the finer details of implementing the work. Keep senior-level staff involved through brief updates on progress, highlighting how their organization is contributing and how their organization's goals are being met through the partnership's efforts. Bring them back to the table when it's time to reassess strategy or priorities.

MID-LEVEL

Finally, you may be working with staff that are somewhere in the middle. These folks are likely to understand the issues on the ground, have close connections with field staff, and may have some autonomy to commit time and resources to the partnership on behalf of their organizations. However, they will need to get buy-in for the partnership up and down their chains of command. They may not be in a position to direct the structure and scope of the partnership and may need to get approval from their organizations regarding issues such as data sharing and branding. While they are likely to have influence over other organizational resources, it is important to ensure these partners have information and arguments to assist them in gaining buy-in, such as benefits and successes of the partnership. You will also need to allow ample time for the making of decisions that may require them to consult with their organizations.

Regardless of who serves as an organization's representative, consistency is key. At the outset, make sure that the individual representative and their organization are committed to their participation in your project. A simple sheet outlining basic partner expectations can help create clarity for everyone. It may include, for example, the goal of the partnership, the estimated time commitment (e.g., four meetings a year, with email communications in between, for the next two years), and a request that they let you know if they are no longer able to participate.

It can sometimes feel as if you have to "take what you can get" when seeking partners, but if you consider all of the time and effort (and sometimes money) that you will be putting into the partnership, it makes sense to be selective and require some level of commitment. It is hard to accomplish much when issues have to be re-explained at each meeting, or you get a rotating cadre of organizational representatives who don't entirely understand the purpose of the partnership or their organization's role. Of course, not everyone will be able to attend every call, but if an issue is actually important to that organization and they see value in the partnership, it is not unreasonable to ask them to attend meetings consistently.

Depending on their expertise and positions, senior, mid-level, and field staff bring different skills and resources to the coalition. When you have a choice, try to ensure that the positions of your points of contact at partner organizations are aligned with the kind of participation and contribution you seek, and be prepared to manage the coalition accordingly. Do your best to make it easy for your partners to participate by providing data and resources that will help them get the buy-in they need.

3.4 Managing the Partnership

Managing a partnership takes time and effort and adds a layer of complexity to the project. This section provides guidance on three crucial aspects of managing a partnership: setting goals and expectations at the start of the project, coordinating ongoing activities, and using evaluation data to promote accountability and shared learning.

A SHARED UNDERSTANDING OF GOALS AND EXPECTATIONS

When building a coalition that expects to work together over a long period, take time at the start of the project to ensure that everyone is on the same page. Don't assume that similar or aligned organizations see conservation challenges in the same way; ask them. Do your partners agree on the main problem and the most effective solutions? Do they agree on what success looks like? And does each organization understand its role and that of the other partners? It is better to seek clarity early on rather than be hampered by confusion or tension later in the game.

For example, suppose your partnership is working to conserve habitat for a threatened bird species. Perhaps your organization believes that the biggest imperative is to preserve habitat corridors through conservation easements and the purchase of land. Another organization may be focused on managing invasive plants that are negatively affecting their nesting sites, while another is working to encourage pet owners to keep their cats indoors and their dogs leashed when young birds are just leaving the nest. Even though each of these organizations may claim the same goal—increasing the number of these birds—the path to get there and the metrics to measure success along the way will be different for each. This doesn't mean these organizations can't work together to achieve this goal. In fact, you are likely to see greater success if you coordinate your efforts to focus on particular geographies. However, each organization must be clear about their goals and contribution to the partnership.

In another example, suppose your partnership is working toward sustainable timber management. You agree that many landowners will need technical and financial assistance to accomplish this. Your organization is able to provide management plans for the landowners, while another provides the financial assistance. However, you will need to agree on what sorts of practices are most important for sustainable timber management. If you are focused on thinning before harvest and replanting after harvest, while your partner is focused on managing invasive species and supporting natural regeneration, the partnership will not be as effective because the opposing messages could confuse the landowners, or the activities you recommend may not be covered by the available financial assistance. The Ladder of Engagement (see Section 2.2: From Project Goals to Landowner Actions) is a great tool to help you and your partners get on the same page about goals and see how your different roles work together to support landowners at different steps.

Early discussions to reach agreement on goals, plans, and expectations are a vital step in forming an effective partnership. Having a facilitated discussion helps ensure that all partners' voices are heard and that everyone is actually in agreement about the path forward. It may be beneficial to use an inhouse or external facilitator who is not involved in the project to neutrally facilitate the discussion and help the partners to be candid. It can take some time to reach agreement, but this investment pays off because there is less confusion about who is doing what and why, and the discussion helps ensure smoother progress.

PROVIDING EFFECTIVE COORDINATION

Coordination and consistent communication are key for any partnership to work. Someone has to be in charge of ensuring everyone is on the same page, everyone's voices have been heard, and the group is in agreement about how to move forward. Someone also needs to nudge groups or individuals to follow through on what they have agreed to do. If you are the one initiating the partnership, then the coordinating person will likely be you.

3 WORKING WITH PARTNERS

The coordinator's role is not simply to "manage" the coalition; it also includes fostering and sustaining relationships. Given that an effort to move landowners toward your desired goal could unfold over months or even years, it's important to build and maintain relationships with partner organizations so they continue to support the project and fulfil their roles. Efforts to keep partners engaged with you and with each other increase their personal and organizational investment in the program's goals and build trust for repeating and deepening collaboration over time. Here are some considerations to keep in mind.

Your partners are busy.

- The easier you make it for your partners to do what you ask, the more likely that task is to get done. Ask your partners what works best for them in terms of scheduling, platforms for sharing resources, or areas where they need support.
- Ask for what you need only from a particular person or organization, rather than giving the same tasks to everyone. When appropriate, form smaller working groups to take on tasks that the whole partnership doesn't need to participate in.
- Give people timely reminders of when items are due. Give yourself extra time to follow up after the deadline, because someone will always be late.
- Make the most of meetings when you have them. Distribute your agenda ahead of time, noting items that will need input or decisions. Take good meeting notes and make them available to everyone. Send out action items with names and deadlines.
- Reacting to something is much easier than creating something from scratch. Do background research, so you can give people a starting point. (E.g.: If we use these five threatened or endangered species to focus our work, this is what the map would look like. Here are three alternative landscape goals we can pursue.)

Your partners have bosses.

- Establish regular meeting times and work schedules, so partners can plan around them.
- Remind people of the purpose of the partnership and what role their organization plays within the larger framework.
- Provide relevant information that your partners can share with their boss and colleagues to help maintain the buy-in they will need to continue to commit time to the partnership (e.g., reach and impact of the partnership, applicable learnings).

Relationships and meaningful work are important.

- If some of the partners don't know each other well, commit time to build relationships, perhaps by organizing a shared meal or field tour for partners, or even by incorporating icebreakers or social time in your meetings. This will help build trust and generate enthusiasm. A bit of fun also sparks more creative solutions to problems and challenges.
- Share successes with the partnership, particularly when you're asking someone to do something that is extra work or that may feel tangential, such as sharing tracking data. Show them clearly how you're using that tracking data to make improvements to the program and create a larger impact.
- Build ownership and investment at meetings by giving partners opportunities to lead particular agenda items and allowing time at the end for everyone to share information about their related work or upcoming programs.
- Share failures with the partnership. Everyone can learn from the lessons of the group, and people will appreciate the transparency.
- Invest in your partners by generating opportunities for professional development that will advance the project.
- Thank your partners frequently and genuinely for their contributions.

Organizing the work of a coalition and sustaining relationships with partners take time and intentionality—having a dedicated person to shepherd this process is important. In addition, consistent communication, clear goals and expectations, and a bit of grace and understanding are all key to making the partnership work smoothly. If you bring in the right partners from the beginning, all of this will be easier, but even the most ideal partnership will have hiccups. Give yourself some grace, too.

EVALUATING SHARED EFFORTS

Discussing benchmarks and indicators at the start of the program is an effective way to ensure that everyone is on the same page regarding what you are trying to accomplish. Indicators bring clarity to vague objectives. For example, the stated goal of your program may be to “increase good stewardship on the ground.” Discussing how progress toward this objective will be measured (e.g., number of stewardship plans written, acres treated against pests, acres of stands improved) helps clarify what practices and behaviors you’re actually trying to promote.

Getting clarity on evaluation indicators, practices, and protocols is also essential for accountability and shared learning, the latter of which being one of the most important benefits of collaborative efforts. If you are tracking and evaluating your project throughout the process, you will be able to assess and modify your methods as you go along. Each stage is a new hypothesis to test or a new pilot that can then inform each future stage. Even if you don’t have the capacity to set up a formal experiment or comparison groups, you can assess each stage of your project and make informed judgements and shifts based on the data you have.

So when you are discussing your program goals and finalizing your communication objective (see 2.2 From Project Goals to Landowner Actions), ask your team: How will we know whether our outreach effort is successful? What indicators will we (and others) use to evaluate this program? What benchmarks do we have to meet?

TRANSLATING BROAD GOALS INTO SPECIFIC INDICATORS OF SUCCESS

Your benchmarks and indicators should follow a clear path to your goals. They should also be reasonable for you and your partners to manage. It's better to set modest tracking goals that everyone can reasonably handle than to use ideal metrics that are not realistic.

Also, pay attention to how you will share and use data. Some organizations are unable or unwilling to share certain data, particularly data related to individual landowners. Are there ways to aggregate the data so it can still inform your processes? Is the organization with the most stringent data-handling policy willing to take on the housing and reporting of the data? Can agreements be put in place that would allow additional data sharing within the partnership? Can all partners participate in training to ensure that data security across the partnership aligns with the highest standards? If you can't integrate and share data across the coalition, it will not be nearly as useful for the group.

For partners to buy in to collecting and sharing data, it's important for them to know that data won't be used to judge or punish any particular individual or group. The purposes of data sharing are to provide insights on how to improve the partnership and its work, and to build on strengths and address weaknesses. Start by helping your partners see how the partnership will use the data to make improvements and move closer to the final goal. Afterward, it's important to share results with the whole partnership and be clear about what changes will be made based on those results.

Chapter 8 (Evaluation and Learning) has more information on planning and preparing for your evaluation and ensuring that the results are useful for all partners. Make sure you read that chapter before you launch your program.

Clear and consistent communication is vital to effective partnerships. Spend time early on to get everyone on the same page about goals and plans, do your best to make it easy and rewarding for your partners to participate, and make sure everyone can benefit from the lessons learned by the partnership.

4

UNDERSTANDING YOUR AUDIENCE

TOOLS FOR
ENGAGING LANDOWNERS
EFFECTIVELY

4 UNDERSTANDING YOUR AUDIENCE

Purnima Chawla

4.1 Why Choose an Audience Segment?

One of the main tenets of the Tools for Engaging Landowners Effectively (TELE) method is to design programs and messages to appeal to a specific audience segment, i.e., a particular type of landowner. Landowners are not monolithic; they have different knowledge levels, needs, resources, attitudes, and values. Focusing your outreach on a specific type of landowner is the key to developing effective programming and messaging.

The logic behind targeting is simple: If you don't know whom you're talking to, how will you know what they need and what you should say?

In practice targeting outreach to specific landowner segments improves your effectiveness and efficiency in three ways:

1. **Better Programs.** It allows you to tailor the desired behavior and program support to landowners' knowledge and readiness levels. For example, knowing whether your landowners are likely to implement a particular management activity themselves or hire vendors is important for determining what kinds of advice and support they'll need through the process.
2. **Better Messages.** It enables you to develop messages that speak more directly to their needs and preferences, thus making it more likely that your message will get their attention and persuade them.
3. **Better Reach.** You can use more focused channels to reach the landowners whom you really want, so the overall return on your outreach investment is higher. Moreover, when you use targeted channels, people know that you are talking especially to them and understand that your message is relevant for them.

For example, let's say you want landowners in your area to help you curb a new invasive species by reporting occurrences and taking early action. The first thing you might determine is that people who already have management plans and want to be local conservation leaders are best suited to take this action and to carry your message to their friends and neighbors. You also decide that this group will be willing to attend a presentation to learn more about this topic.

Consider the following taglines for a flier promoting a presentation on this topic:

Option 1:

> **Your woods are under threat. Come learn how to protect them against invasive species.**

Option 2:

> **You've already got a handle on garlic mustard, but are you on the lookout for this new invader?**

An active and knowledgeable conservationist would probably ignore the first flier, assuming that the presentation would be about general information that they already know. But the second would seem more relevant for them. So even if the two types of fliers were displayed in the same location, the second one would be more likely to bring more active conservationists to your presentation. (Conversely, if your goal was to engage hitherto unengaged landowners, the first tagline would have been a better bet.)

You could further increase the impact of your outreach by using selective channels. Identifying local landowners who have management plans is simple enough, but how do you know if they want to be local leaders in conservation? Perhaps local conservation organizations could help you reach area landowners who are able and willing to lead conservation efforts in the community. Through these groups, you might be able to make a targeted presentation to 20 local conservation leaders, all of whom would be able and ready to take the desired action.

Targeting doesn't have to be perfect for it to work—even small changes can improve the response rates to your messages. Furthermore, these small changes make it more likely that you will be able to attract and engage the people who are ready and able to take actions that will help you achieve your conservation goals.

THE COSTS OF NOT TARGETING

Tailoring programs and messages to a particular audience segment can sometimes be difficult to practice because it appears to exclude landowners who are not part of your target audience. In reality, however, targeting doesn't mean excluding anyone—it means making a special effort to attract a particular kind of landowner.

Also, consider the alternative. When we don't tailor our programs to the needs and preferences of a specific audience segment, we usually end up developing materials for an audience that either looks like us or like the landowners whom we talk with most frequently. It is easy to see how this limits the scope of the project to "insiders"—i.e., people who are already informed about and committed to the issue. Targeting specific audiences is, therefore, essential for bringing new people—those who are not already part of the choir—into the program.

Sometimes, we do understand our audience and recognize the differences in their beliefs and attitudes on the issue. But we try to address the needs of all these audiences in one set of materials. The result is a hodgepodge that speaks a little bit to the needs of all audiences, but not strongly enough to drive action for any one of them. Sometimes, these materials send mixed messages, addressing one audience's needs in one sentence and saying the opposite to another audience in the next.

Consider this postcard text:

> **Save the Gopher Tortoise. Grow the hunt.**
>
> **Meet with your local forester to find out how you can manage your woods for multiple benefits, including creating habitat for endangered tortoises and making your hunt more productive and enjoyable.**

Combining messages about saving the tortoise and improved hunting in a single postcard implies that the recipient cares about an endangered tortoise and wants to hunt other animals. There might be a few such folks out there, but the more likely scenario is that some of the landowners care about saving the gopher tortoise, while others are motivated to maximize hunting on their land. Therefore, developing two different postcards would allow you to make a more compelling argument to each type of landowner.

> Choosing a target audience allows you to focus on their goals and values more sharply and, therefore, develop messages that resonate with them and compel action. Working with a specific landowner segment also helps you to tailor desired actions and supports to landowners' needs, knowledge, and resources.

4.2 How to Pick a Target Audience

The main point of picking a target audience for your outreach effort is to identify a group of landowners who will likely have a similar orientation to your program and will, therefore, react similarly to your materials. There are several ways to identify and define this relatively homogeneous group of people.

1. **Geography.** It can make sense to identify your target audience based on geography. Oftentimes, people who live in a particular area have similar demographic characteristics and land use patterns. However, if the landowners in your chosen geography differ on some relevant factors (e.g., farmers and non-farmers), you may need to narrow your landowner audience further.

2. **Orientation to their land.** The Tools for Engaging Landowners Effectively (TELE) landowner segmentation serves as a good launching point to thinking about different types of landowners, because these segments are based on how landowners orient to their land and to the benefits of owning woodland. (See Section 4.3: The TELE Landowner Types)

3. **Ability to advance your conservation goals.** Not all landowners' actions have an equal impact on the landscape. You might decide to target landowners whose actions will have a greater impact, such as those whose lands abut conserved lands or those who have larger parcels.

4. **Likelihood of taking action.** When starting a new program, it often makes sense to choose an audience that is most likely to take the desired action—i.e., the lowest hanging fruit. Perhaps you can identify a group of landowners who are directly affected by the problem you're addressing. Or perhaps there is a group that is more likely to value the benefits of the desired action. Getting the most likely actors on board first can be good for building momentum and creating a community norm that could persuade others.

5. **Previous activities.** You can choose an audience based on something they have (or have not) done already. Perhaps you want to take folks who already have a management plan to the next level of implementation. Or maybe you want to work with folks you know have not yet created firebreaks around their home.

6. **Ability to act.** If the action you're requesting is relatively difficult, landowners' ability to take that action may be a decisive factor. For example, if you know there aren't enough contractors in the area to remove Japanese barberry, you should choose an audience that has the skills and tools (and time) to remove the invasive plant themselves. Or if the desired action requires a hefty up-front investment, you may need to target landowners who have sufficient disposable income to make that investment.

In many instances, you will need to overlay two or more of the above criteria to get a sufficiently narrowed audience. Depending on the audience characteristics, you can reach members in a targeted way by tailoring your channels and your messages.

4.3 The TELE Landowner Types

Early analyses of NWOS data by the Sustaining Family Forests Initiative (SFFI) showed that how woodland owners orient to the amenities and financial benefits of owning woodland plays an important role in their land use patterns, motivations, and decision-making. Based on this data, and subsequent focus group research, SFFI has identified four types of landowners. People who fall within a particular landowner segment will all tend to have a similar orientation to land ownership and will likely have more similar responses to offers and messages.

The table below describes the four TELE landowner types. Data profiles of the TELE types are also available on the TELE website.[5]

COMPARING THE TELE SEGMENTS

	 **Woodland Retreat Owners**	 **Working the Land**	 **Supplemental Income**	 **Uninvolved**
Orientation to Woodland	Own woodland primarily for its beauty, and conservation and recreational value Many love nature and animals and appreciate ecological benefits of woods	Tend to be pragmatic; value aesthetic and recreational benefits of woodland but also see woods as a financial asset	Tend to own land primarily for timber income and investment	Tend not to care about woods; assign low importance to their financial, recreational, and aesthetic benefits More likely than the other segments to be willing to sell their land and less likely to want to see it stay woodland
Want Information About	Land improvement (trails, ponds, streams, etc.) Keeping the woods healthy, beautiful, and good for wildlife How to find reliable loggers and other service providers Financial assistance for improving or maintaining their land	Timber market trends and rates How to choose reliable loggers and other service providers Protecting woods from natural and human threats Entrepreneurial activities, such as cultivating non-timber forest products to garner extra income How to improve wildlife habitat Financial assistance for improving or maintaining their land	Timber markets Government programs, especially tax incentives and cost-share programs How to protect their legacy; estate transfer issues How to maintain the long-term health and value of the land Emerging threats and invasive species	Ways to minimize land maintenance and management costs Estate planning and land transfer

5. www.engaginglandowners.org/landowner-data/landowner-segments

	Woodland Retreat Owners	Working the Land	Supplemental Income	Uninvolved
Current Stewardship Behaviors	Despite their stewardship orientation, they have some of the lowest rates of active land management behaviors, such as having a management plan, consulting foresters, or using cost-share programs	The most likely segment to participate in a cost-share program (19%) or have a management plan (21%) More likely to have taken active steps to improve wildlife habitat	Second most likely of all segments to participate in cost-share programs and have management plans (but still small proportions) Most likely to have worked with a forester, typically for timber sales	Along with Woodland Retreat Owners, least likely to have a management plan or participate in a cost-share program
Main Motivators of Stewardship Actions	Stewardship ethic Natural beauty and wildlife protection Enjoyment of woods with family members, e.g., walking, hiking, camping, and fishing	Maximizing ongoing returns from woods without damaging the land ecologically or financially Ethic of respectful and judicious land use Enjoyment of recreation on land (including hunting); also enjoyment of tending their woods	Want to maximize financial benefit from woodland Concerned with long-term health of land (mainly to ensure it stays financially productive) Want to keep land intact for heirs	Want to reduce taxes and land management hassles Want to minimize problems on the land (e.g., vandalism, trespassing) Many in holding pattern until they can figure out what to do with the land or pass it on to the next generation Want to keep land intact for heirs
Main Barriers to Good Stewardship	Lack of knowledge about what actions to take Perception that woods manage themselves—many believe minimal human activity and interference is best way to promote woodland health Many have small parcels of land, making some land management activities less practical or more expensive Financial constraints	Fixed ideas about what is good for woods; feel they know best Mistrust of outside authority and expertise (e.g., fearful of getting swindled by loggers and consultants) Wary of any limitations imposed on them (big barrier to participation in conservation easements or even tax relief or cost-share programs)	Skeptical of most programs that impose restrictions on land use; might try to work around program requirements or do the minimum necessary Need to be convinced that stewardship behaviors are cost effective, at least in the long run; altruistic or environmental reasons are a harder sell	Lack interest in improving or managing their woods and/or the knowledge to do so

	Woodland Retreat Owners	Working the Land	Supplemental Income	Uninvolved
How to Reach This Segment	Give them specific, easy, low-cost actions to achieve their objectives (e.g., attracting wildlife) Challenge their belief that woods are best left alone Help them understand the ecological significance of all woods (even small parcels) Appeal to their sense of responsibility and stewardship	Affirm their outdoorsy lifestyle and traditional values Give them information but don't tell them what to do—accept their independence and cautiousness They actively seek information on land management; most like getting information through word of mouth, relevant publications, and direct mail	Emphasize ways to enhance financial gains or maintain land value for future generations Ready to learn more about land management—especially if it yields immediate or long-term financial benefits Most keyed to the forest industry and "forestry" community, including landowner associations, trade publications, and events	Not an easy target for conservation or woodland management campaigns Messages should identify direct financial benefits, preferably without too much effort on their part May be more receptive to incentives and programs that benefit both farms and woods Can be reached by direct mail and traditional channels used to reach farming community
Demographic and Situational Factors	Education level is higher than other segments Most live on their woodland	Most live on their woodland	Many do not live on their woodland Have the largest plot sizes	Many do not live on their woodland Tend to be older than other segments Most likely to have a farm (1 in 3) Most likely to sell their woodland

4.4 What Is an Audience Profile?

An audience profile is a "picture" of your target audience, developed specifically with a view to identifying features and attributes that you can tap to create your messages.

Audience profiles are grounded in data, but they are not simply a compilation of statistics. Think of a profile as a caricature of your landowner population, similar to a composite sketch developed by an artist based on the impressions of different people. When combined, seemingly disparate, incomplete, and biased bits of information can come together to create a pretty realistic image of the whole.

The more clear and concrete this picture is, the better your chance of identifying key motivators and presenting them in a way that is compelling for your target audience. The audience profile will also give you clues on where and how to reach target audience members—what channels to use, what sources or partners could enhance your credibility, where you should hold meetings and forums, etc.

Because each landowner is different (even within an audience), an audience profile is undoubtedly an overgeneralized picture that emphasizes certain dominant and prevalent attributes. The profile doesn't have to be 100 percent accurate to be useful. The idea is to combine what you do know about the people you're trying to influence, so you can understand the target behavior from their perspective—i.e., "get in their heads" for a bit.

Basic audience profiles tend to include information (or educated guesses) that answers the following questions:

- What values and ideas drive landowners' decisions about their land?
- How do landowners spend their time and how does this affect how (and how much) they interact with their woods?
- What do landowners currently know and think about the desired action?
- What knowledge and capacity do landowners have to implement the desired action?

It is also important to remember that woodland owners are simply people who own woods. Your audience profile will be even richer if it includes information about who your audience members are as people (and not just landowners). For example:

- What are the broad values and attitudes that underpin the culture of this community?
- Who lives in this community (demographic attributes) and how do they spend their time (lifestyle, pastimes, etc.)?
- What gets people's attention in this community? What do they talk about?
- Who do people listen to? What channels and sources of information are influential in this community?

A profile is a picture of your audience, which you create from multiple sources of information. It is a description, rather than a collection of data. Audience profiles include knowledge, attitudes, and behaviors relevant to the desired action, but go beyond that to understand what matters to audiences, how they are likely to make relevant decisions, and what will get their attention.

4.5 How to Develop an Audience Profile

An audience profile is prepared by compiling and organizing information about your target audience. The more sources of information, the better the profile. Although each source of information will give you only part of the picture, and perhaps a biased one, combining different sources will bring out the patterns and themes that best describe the audience.

Quantitative Research

Survey data is often a good place to start. It provides a skeleton that you can then flesh out with more qualitative and observational data. But be careful: relying on statistical averages can be misleading. For example, if most landowners in your area are either retirees (65 years old or older) or young families in their thirties, then the average age of the landowners in the area might be 45 years. But developing a program targeted at people entering their middle ages is clearly off target in this community.

A good source for survey data is the National Woodland Owner Survey (NWOS), the most comprehensive national survey of landowners. You can access this data via the NWOS website,[6] or you can download easy-to-use data compilations for selected landowner segments from the TELE website.[7] You should also check with your state universities and extension services to see if they have done surveys or other studies on landowners in your area.

Depending on your objectives, legal or organizational records may also be valuable. For example, if your target audience is landowners who hunt, checking public records of hunting licenses will help you pinpoint your target audience members and give you clues about where (i.e., what towns or districts) you're most likely to find them. Or if your target audience is landowners who are already doing some activities on the land, organizational records such as cost-share applications and permits can give you an idea of what actions they have already implemented.

Demographic data is also important, not in and of itself, but in what it tells us about people's lifestyles, resources, and constraints. For example, knowing income levels in a region tells us the likelihood of families having discretionary income to invest in their woods. Education levels can cue us on the language we should use in our materials. And understanding what age categories landowners fall into gives us some idea of their life stage and accompanying family, parental, and professional commitments.

Collective Brainstorming

You'll be surprised at how much you already know about landowners in your area. One technique that works well is collective brainstorming with your team. Each of you will have met different landowners and have a slightly different perspective of them. Pull your ideas together, and you're likely to come up with a pretty accurate profile of the people you want to reach. See the Stick Person Tool on the next page to guide your brainstorming and come up with a rich, useful landowner profile.

When brainstorming, it is important to think about the qualities and attributes of a typical member of your audience. Of course, there are some well-informed and super-motivated landowners who are constantly seeking better ways to improve their woods. These are probably the people you meet most often and those you know best. However, unless your program is specifically targeting these "model owners," be careful not to let them dominate your understanding of your target audience.

Key Informant Interviews

Talk to people who are familiar with landowners in that area (e.g., service foresters, extension folks, etc.). If you feel that you're one step removed from your audience members, ask people who interact frequently with them to help flesh out and "ground truth" your profile. Use the questions in the Stick Person Tool to guide those conversations. And, once again, be careful to collect information about the people you want to attract and not those who are already motivated and engaged with the conservation community.

6. https://www.fia.fs.fed.us/nwos/
7. www.engaginglandowners.org/landowner-data

Conversations with Landowners

It's not difficult to invite a few landowners who fit your target audience for coffee and a chat, or to talk to them informally at a community event. But remember that talking with landowners is most useful when you want to fill gaps in your knowledge or test specific ideas. People are generally not good at giving accurate responses to very broad, open questions (such as "What's important to you?"). Another useful strategy is to observe audience members "in their natural habitat." Careful observation can give you important cues about the culture and lifestyle of the communities that you want to target.

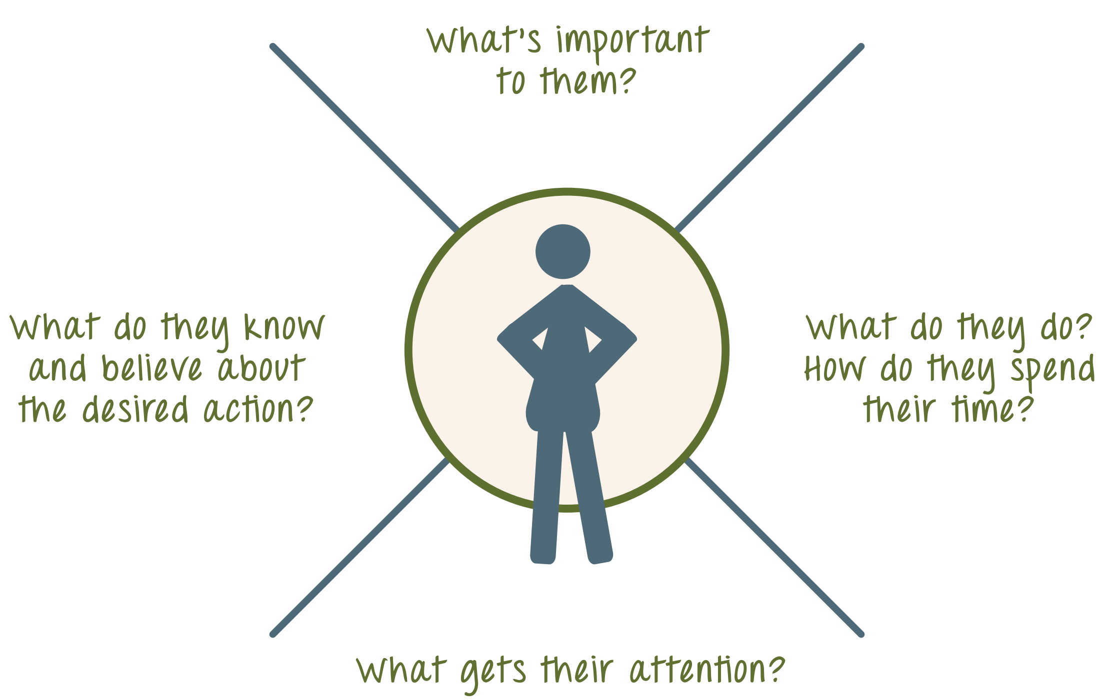
Finally, remember that landowners are simply people who own land. As such, they are likely to be fairly similar to other people who live in the same community. Market research surveys and datasets about the community in general can also give you good information about the values and lifestyles of landowners in that area. Also, if you or your colleagues live and work in the same communities, you probably have a pretty good sense of landowners' broad values, attitudes, and lifestyles.

THE STICK PERSON TOOL AND PAIN/GAIN CHART

Collecting quantitative data or using a TELE profile provides a good framework for identifying the chief characteristics of your target audience. But your team's knowledge of local landowners who fit these profiles adds the necessary color and texture to bring these audience profiles to life. The Stick Person Tool is a useful aid for collective brainstorming about local landowners who are in your target audience.

Draw the figure below on a board and work with your team to list audience attributes in response to the questions in each of the four areas.

FIGURE 4A: A BLANK STICK PERSON TOOL



What's important to them?
Include core cultural values and ideas that frame your audience's worldview, as well as values that influence their relationships with their woods.

What do they do?
Use this area to list how audience members spend their time, including their work, hobbies, and pastimes. Look especially at behaviors that might be relevant, similar, or contrary to the desired action. For example, if you are asking landowners to come to a community picnic, consider whether they are accustomed to this kind of event and what they might expect of it.

What do they know and believe about the desired action?
Note current knowledge levels and attitudes relevant to the desired action. What are they hearing from others? Does it support or work against you? If it works against you, how will you counteract this opposing message?

What gets their attention?
Use this area to list channels and sources of information that audience members pay attention to, as well as topics that tend to get their attention.

As someone calls out an attribute, write it down. Don't worry too much about writing each bit of information in the right area—the goal is simply to list everything you know about your target audience members. Also, don't worry about getting everything exactly right. If there is some disagreement in your group regarding a particular attribute, just put a question mark next to it.

After you've listed everything, collectively evaluate all the information. Then circle the things you all think are most important for designing your outreach messages. These could include key cultural attributes, motivators or barriers. If any of these important attributes were marked as questionable, you will need to do some research before using them in your messaging.

As a final step, go through the audience attributes to identify the main reasons why your audience would or would not take the desired action. A good tool to use for this is the Pain/Gain Chart. Simply draw two columns marked "Pain" and "Gain." In the Pain column, list all the reasons why audience members wouldn't take the desired action. In the Gain column, list motives and incentives that would lead them to take the action. (See the sample Stick Person Tool and Pain/Gain Chart on the next page.)

The Stick Person Tool helps you understand your audience and evaluate the desired action in the context of their lives and values. The richer your description of their lives and values, the better your chances of identifying compelling motivators and finding ways to overcome barriers.

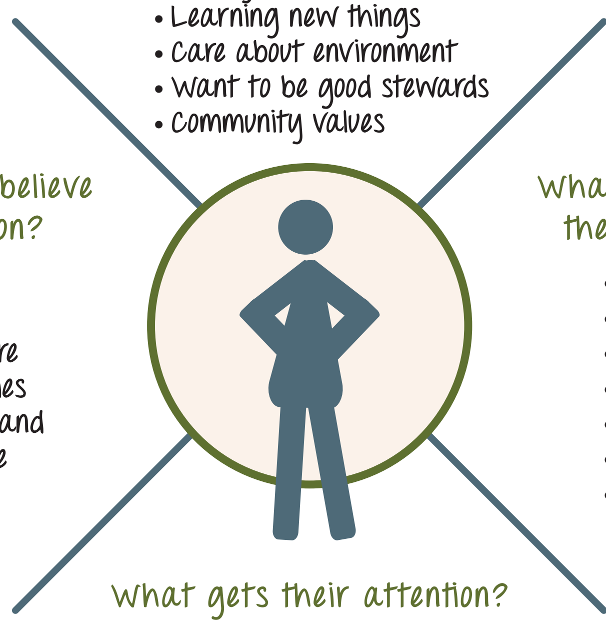
FIGURE 4B: SAMPLE STICK PERSON TOOL AND PAIN/GAIN CHART FOR A PROJECT THAT AIMS TO GET WOODLAND RETREAT OWNERS TO ATTEND A WOODS WALK TO LEARN ABOUT FOREST MANAGEMENT PRACTICES

What's important to them?

- Family
- Learning new things
- Care about environment
- Want to be good stewards
- Community values

What do they know and believe about the desired action?

- Cut trees = bad
- Mgmt is ugly
- Don't know who we are
- Know some plant names
- Know where on their land their favorite birds are



What do they do? How do they spend their time?

- Retired professionals
- Involved in civic orgs.
- Well educated
- Hiking
- Bird watching
- Travel-cosmopolitan
- Disposable income

What gets their attention?

- New things / technology
- Invasives
- Climate change
- What the neighbors are doing

ACTION: ATTEND WOODS WALK / FIELD DAY ABOUT FOREST MANAGEMENT PRACTICES

PAIN ▼	GAIN ▲
• Time/distance to meeting • Not interested in forest management • Don't want to listen to government "expert" • Don't want to feel like they don't know something • Management is ugly/bad • Implementing practices is complicated/ scary	• Learn new things • Wildlife improvement • See what other folks do • Pride • Feel like doing something good for the environment • Contributing to community • Be a good steward

5

DESIGNING MESSAGES

TOOLS FOR
ENGAGING LANDOWNERS
EFFECTIVELY

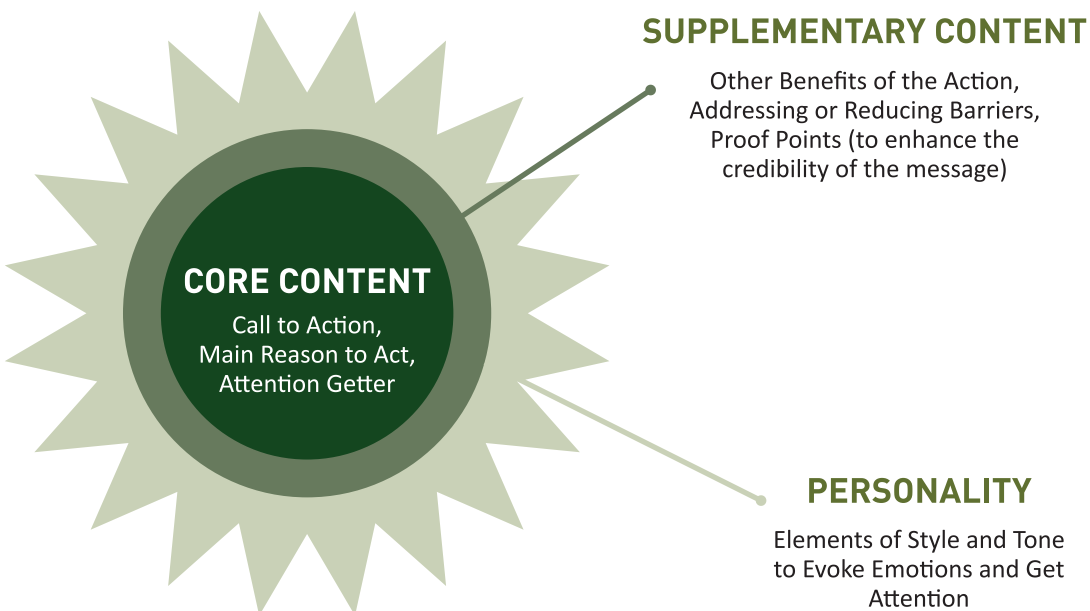
5 DESIGNING MESSAGES

Purnima Chawla

5.1 Components of an Effective Message

Before you can develop any materials, you must have a good sense of the main ideas you want to communicate and how you'll do so. The figure below shows the key components of an effective message.

THE MAIN COMPONENTS OF AN EFFECTIVE MESSAGE



All communications must have a clear and specific call to action and one strong compelling reason for audiences to take that action (see Section 5.2: The Reason to Act). Other benefits and arguments can be used as supporting elements, as can ideas that directly address or undermine barriers to action.

Effective messages also have something that attracts the target audience's attention (see Section 5.3: Messages with Personality). This attention-getter can be an element of the text (such as a shocking statistic or unexpected endorsement), a visual or graphic, or the style and tone of your message. The style and tone of your materials also contribute to the impact of the message by evoking the right emotion to drive action. Just like a picture frame can greatly enhance or detract from the art, the personality of your materials can enhance or undermine your message.

Whether you're designing a postcard or an entire presentation, your communication should be organized around two or three strong, interrelated ideas to drive home a single, compelling reason to take the desired action.

5.2 The Reason to Act

A good message is organized around a central theme—the main reason why landowners will take the desired action. All the visual and verbal elements of your message should be pulling in the same direction to reinforce the ideas and emotions associated with the main reason to take action.

The Tools for Engaging Landowners Effectively (TELE) process uses a tool called the Because Statement to help identify and clarify the essential elements of the message. The format for the statement is as follows:

[Landowner Audience X] will take [Action Y] because [Compelling Reason to Act].

If you used the Stick Person Tool and Pain/Gain Chart (see Section 4.5: How to Develop an Audience Profile), you already have the raw material to identify the main reason landowners will take action. Take another look at the benefits you identified in the Gain column. Can you identify one or two important themes in those benefits? Can any of those be developed into a compelling reason to take action?

Once you've written a Because Statement, evaluate it from the landowners' perspective. Does the reason to act outweigh the costs of and barriers to taking action? If yes, you have a compelling reason for landowners to take action. If not, try again. Sometimes, the main reason why landowners will take the desired action is easy to find, but often it takes a few tries to get it right. If you still can't find a strong reason for landowners to take the desired action, you may need to change the action itself or reduce key barriers to make the decision dynamic work in favor of taking action.

A clear, compelling reason to take action is fundamental to effective marketing messages. From the landowners' perspective, the motivation to act needs to be powerful enough to overcome costs and barriers, including inertia and other demands on their time and resources.

BECAUSE THEY WANT TO LEARN

What is the main reason that landowners go to workshops, trainings, and other educational events? If you answered, "Because they want to learn about ... [insert topic]," you're not alone. But you are only half right. Yes, the people who come to the workshop want to learn about the content you'll present, but they usually have deeper reasons for wanting that information. They have an idea about how they'll use that information and how it'll advance their goals. This deeper motive is what you need to highlight in marketing materials directed at motivating more landowners to come to your workshop.

For example, if you're offering a workshop on making woods more resilient to fire, ask yourself why this matters to landowners. Is it because they don't like looking out at dry, dead trees? Do they fear for their lives and homes? Or is it because they are concerned about loss of timber income? Although the educational content of your workshop might be fairly similar in all these situations, your marketing materials should focus on why that information matters in the first place.

5.3 Messages with Personality

Giving your message a strong personality serves two purposes: (1) it helps draw and keep the audience's attention, and (2) it helps take the audience from intention to action.

Every day, your audience members are bombarded with thousands of "messages" asking them to do something. Whether the desired action is buying a particular brand of soap or adopting a healthier lifestyle, all these messages compete for your audience's time, attention, and resources. In this context, your messages have to work hard to draw and keep landowners' attention. One way to do this is to give your materials a personality that encourages people to interact with them. This personality—whether it is scary, humorous, homey, distinguished, smart, or sad—touches the audience before they have read the first word. And it can make them more likely to attend to the rest of the message.

The same things that give your message personality work double time to evoke emotions. Research shows that our actions are primarily motivated by emotions. True, rational thought guides what we will do. But whether or not we act at all is driven by emotions—either pleasant emotions that we seek to engage or unpleasant ones that we seek to avoid. (The similarity of those two words—"motivation" and "emotion"—is not accidental. They share the same root.)

The strong role emotion plays points to an important truth: to evoke action, your messages must evoke a motivating emotion. Furthermore, if you can be clear about the emotion you wish to evoke—i.e., how you want landowners to feel when they read, view or hear your message—you can create communications that pack a stronger motivational punch.

So ask yourself: How do you want audience members to feel after they receive your message?

Once you know that, virtually all components of your message can be used to elicit emotions—the language, the images, the design and layout, the color scheme, and even the font you use. If you have the luxury of working with a good designer, just specify the emotion you're seeking and see how the elements of design come together to convey it.

Even if you're not working with a designer, you can use the two most important emotional cues: language and images. For example, if your message is to arouse fear, you might use images of destruction and harsh words such as "ravaged" or "destroyed." If you're trying to get people interested in a rather boring topic or trying to allay fears, some humor could lighten the mood and help get their attention. If you're getting people to act for future generations, then words and images that convey family or community ties could invoke feelings of pride and affection.

Just like people, messages that have personality are more likely to get and keep people's attention than those that are bland and dull. Moreover, messages that evoke emotions (like anger, pride, fear or love) are more likely to move people to take action.

SAME MESSAGE, DIFFERENT PERSONALITY

Consider the two fliers on the next page. Both have the same message strategy, which we can summarize using the Because Statement format (see Section 5.2: The Reason to Act):

Woodland Retreat owners, especially relatively new woodland owners, will call a forester to request a woods walk because they want to protect their woods from harm.

Despite the similarity in message content, the two fliers have very different personalities and emotional charges due to simple language differences. The first communicates the message in relatively neutral, scientific language. The second one uses emotionally charged language to get attention and make landowners feel more vulnerable and anxious, thereby creating a greater motivation to act.

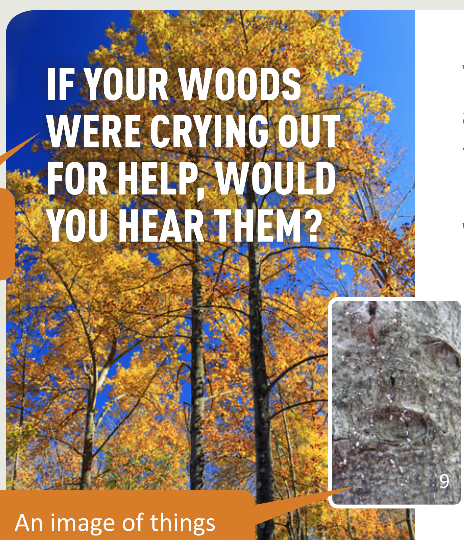
Flier 1: Less Emotional

Woodland habitats are vulnerable to a broad range of threats, from climate change and pollution to pests and diseases. It is really imortant to watch for potential problems so you can address them early on and keep your woods healthy.

Call 1800WDS4EVER to request a visit from your local forester. He/She will walk with you through your woods and show you what to look for. You will also come away with a better understanding of the flora and fauna in your woodland ecosystem.

Flier 2: More Emotional

Captures what they think now and then contradicts it



"Crying out" evokes emotion

An image of things they may see in their woods (and not know whether it's OK or not)

Your trees may look strong and indestructible. But they are actually very vulnerable to a broad range of threats, from climate change and pollution to pests and diseases. Fortunately, you can take simple action to keep your woods healthy and beautiful. Provided you act in time.

Creates time urgency

Creates anxiety

Don't get blind-sided by changes in your woods. **Call 1800WDS4EVER** to request a visit from your local forester. He/She will walk with you through your woods and show you what to look for. You will also come away with a better understanding of the plants and critters that live on your land and give it its unique character.

8. Northern hardwood forest, Monroe County, PA—Nicholas A. Tonelli, 2015. Retrieved from: https://www.flickr.com/photos/nicholas_t/21914597020/sizes/l
9. Beech bark disease—Kent McFarland, 2009. Retrieved from: https://www.flickr.com/photos/vtebird/4123151400/sizes/s/

6

DEVELOPING MATERIALS

6 DEVELOPING MATERIALS

Purnima Chawla, Cassidy Dellorto-Blackwell, and Ravi Singh

6.1 Writing for Impact

The purpose of your marketing materials is to get your audience's attention and touch them in a way that persuades them to take action. You can make your writing more impactful by using language that is (1) focused, (2) understandable, and (3) relatable.

1. Focused. Be economical in your writing. Remember, your audience's time is valuable, and they are impatient. Respect their time and attention by getting to the point quickly and including just enough information to deliver the message. Make every word count. Avoid introductory text, fluff, long-winded sentences, and extraneous details. Use active voice whenever you can. Use bullets, tables, or graphs to communicate complex information.

The trick to succinct and focused writing is to be clear about your main message, and include just enough text to drive that message through. That is a lot easier when you target a particular kind of landowner (see Section 4.1: Why Choose an Audience Segment?) and develop a clear message strategy based on what will be salient to that group.

Consider the following letter designed to get landowners to talk to a service forester before harvesting trees.

FIGURE 6A: AN UNFOCUSED, UNTARGETED LETTER LEAVES LANDOWNERS CONFUSED

Dear Woodland Owner,

Our state's woods are an important natural resource, providing homes for wildlife and clean drinking water for the community, and storing carbon for the future. Your forested land is an important piece of the overall landscape and can provide you with timber income.

The Department of Natural Resources protects and manages public lands and works with you and other landowners to help conserve our state's forests. We can connect you to the financial and technical resources you need to:

- prepare for a timber harvest
- improve wildlife habitat
- reduce risks from forest pests
- protect streams and reduce sedimentation
- enhance ecosystem services

Timber harvesting is a complicated process and involves many steps, including marking trees to be cut, hiring the right logger, understanding the market, and ensuring that the woods are left in good shape. Your local forester can help you make informed decisions about how to earn income from timber sales while maintaining the health and beauty of your woods.

Contact Tim, your local service forester, at 1800FORWOOD, to get more information about harvesting your woods sustainably and getting a good price for your timber. This service is offered at no cost to landowners.

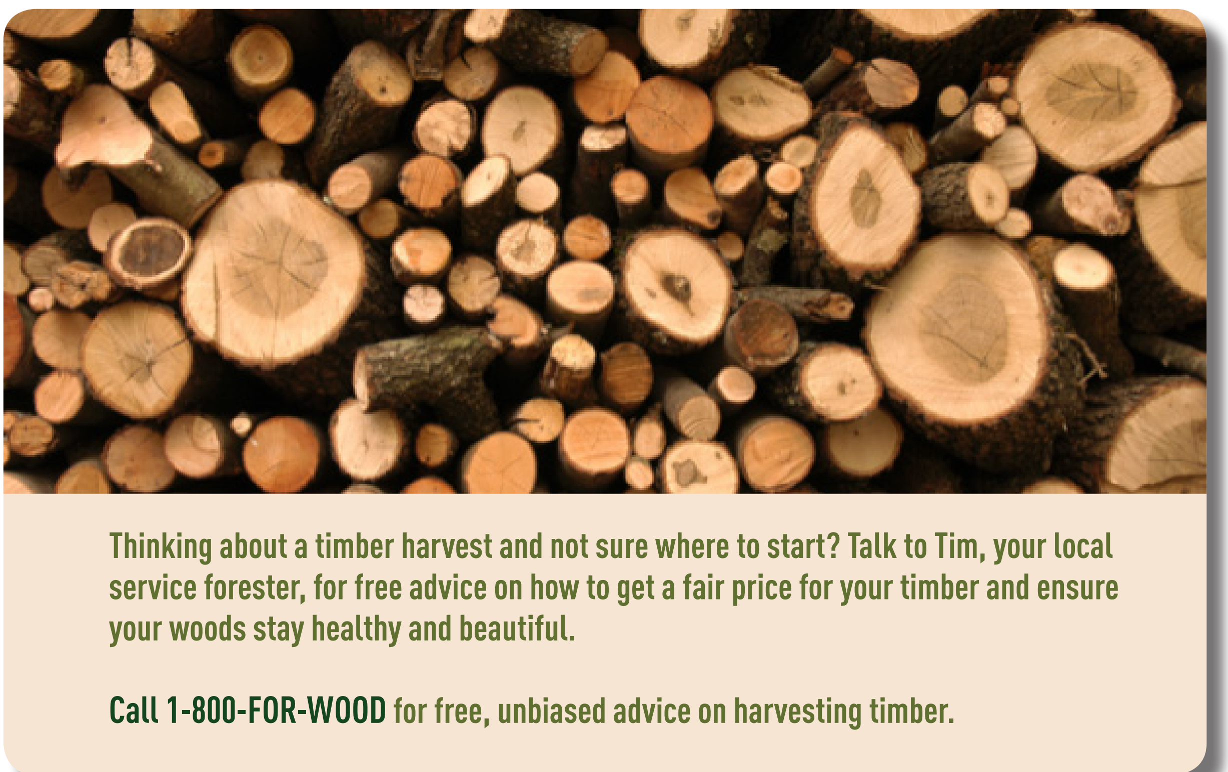
What's wrong with this letter? It's trying to do too much. It is mixing conservation and financial values, trying to build the Department of Natural Resource's brand, and offering too many service options. Sure, the landowner is supposed to call for more information, but about what exactly? Landowners need to search the text to find a reason to call Tim and, unfortunately, many of them won't take the time to do so.

Now, suppose that you targeted this outreach to Working the Land owners (see Section 4.3: The TELE Landowner Types), a generally well-informed and savvy segment that wants to maximize financial gain while preserving long-term value and ecological amenities. You and your colleagues work through the TELE process and develop the following Because Statement (see section 5.2: The Reason to Act) to express your message strategy for this communication:

Working the Land owners will talk to a forester before harvesting, because they want to maximize their income while protecting their woods.

With this level of focus and clarity, your message can be communicated with much fewer words, as captured in the postcard below.

FIGURE 6B: A TARGETED, SUCCINCT POSTCARD GETS THE JOB DONE



The postcard text above omits things that this type of landowner already knows and gets to the point quickly. It speaks directly to Working the Land owners' motivation to get the best income while protecting their woods and not get taken advantage of. It assures the landowner that the advice you're offering is free and unbiased, which helps them feel more comfortable about approaching you.

WRITING FOR THE WEB

Being concise is especially important when writing for the web. Your site should convey information in a way that is easy to scan. Keep it short and sweet—both paragraphs and sentences should be small chunks of information. A good rule of thumb is paragraphs of 3-4 sentences with each sentence comprising around 10-15 words.

2. **Understandable.** Make sure that what you are saying is written in a way that your audience can understand. Simple language signals inclusion and builds trust. On the other hand, if folks don't know what you're talking about, they won't want to talk to you. Most marketing materials should be written at about an eighth-grade reading level. You can check the readability of your materials or website using free online tools (such as readabilityformulas.com and readability calculator). Most of these websites also offer suggestions for making the text simpler and more readable.

Many words and phrases that are commonly used by natural resource professionals are not understood or are misunderstood by landowners. These words also signal a condescending, top-down attitude that can intimidate or annoy your target audience. Avoid jargon and overly technical language, except in rare cases when you are speaking to an audience that wants to feel as though they are "in" with the experts—in that situation, using a few technical terms (with explanations) can help.

3. Relatable. Use language that resonates with your target audience and signals that you are talking directly to them. Not surprisingly, this is much easier when you are, indeed, talking to a specific audience segment. Then you can use language that is likely to appeal to them (even though it may be less effective for other landowner types).

Consider this text for a flier tailored to Woodland Retreat Owners.

Your woods are home to all kinds of wildlife. Join us Saturday, September 15, to see what local woodland owner Jane Wilson has done to provide homes for a variety of woodland creatures. Jane will walk us through her property, showing us the different ways she's enhanced her woods to benefit a variety of wildlife. After the walk, we will enjoy a picnic lunch from Claire's Kitchen. We will be joined by local wildlife specialists and foresters there to answer your questions. Call 555-555-5555 to reserve your spot today.

This message uses words like woodland creatures and woods to relate to Woodland Retreat Owners. Instead of talking about management practices, it talks about the "ways" that Jane cares for her land. The event itself—a walk in the woods with a local landowner, followed by a picnic lunch—is likely to appeal to folks who enjoy being in the woods but who may feel bored or intimidated by a lecture about creating early successional habitat.

Good writing communicates the main points of your message in the clearest, most compelling terms, and in a style suited to your audience. All the words in your communication materials should be carefully considered. They should either contribute to landowners' motivation to act or increase their ability to do so.

6.2 Imagery to Support Your Message

We live in a visual world and smart use of images and graphics can greatly increase the impact of your materials. Images are not simply for decoration. A picture can increase the impact of your message in many ways, and thinking carefully about what purpose you want an image to serve can help you select the best image for the job.

1. Pictures can be great attention-getters. Generally speaking, images that are relevant and specific to your audience and their environment work better than generic landscape pictures or clip art. Similarly, close-up pictures that show people's faces get the audience's attention better than wide-angle shots of groups or scenery. Images that are somewhat unexpected or surprising also cause people to look twice and attend to your message, if only out of curiosity. And it goes without saying that vivid, high-quality images have a positive impact on the attractiveness and credibility of your message, while blurry or distorted images do the opposite.

LESS ATTENTION-GETTING

10

MORE ATTENTION-GETTING

11

10. Willamette National Forest, Trapper Creek Outdoor School, US Forest Service, Pacific Northwest Region, 2011. Retrieved from: https://www.flickr.com/photos/forestservicenw/34726967562/sizes/l

11. Free Fish Day, Deschutes National Forest, US Forest Service, Pacific Northwest Region, 2011. Retrieved from: https://www.flickr.com/photos/forestservicenw/36275562444/sizes/l

2. Pictures and graphics can help communicate your message or support your argument. Sometimes, a picture or a smart graphic can really drive home a point faster and more powerfully than a thousand words. For example, this picture of a controlled burn is a nice contrast to the news images of massive wildfires, and can help landowners who are afraid of prescribed fires to see that they aren't so scary.

12

3. Pictures can also help to evoke a mood that enhances your argument. Consider the two images below. The first one would be a good candidate for a flier that seeks to tap into landowners' community spirit. The second would be better for a flier that seeks to motivate landowners by evoking pride in their individual landholding.

13

14

12. RxCADRE research plot, US Forest Service, Pacific Northwest Research Station, 2012.
Retrieved from: https://www.flickr.com/photos/usfs_pnwrs/36449810445/sizes/l
13. Green River clean-up with Lindsey Wilson College cross-country team, Louisville, US Army Corps of Engineers, 2012.
Retrieved from: https://www.flickr.com/photos/louisvilleusace/8071976003/sizes/l
14. Jim Chew, Forever Grateful Ranch, US Department of Agriculture, 2018.
Retrieved from: https://www.flickr.com/photos/usdagov/39968670233/sizes/l

4. Pictures can help you connect with your target audience by demonstrating that you understand their needs and their lives, and that you're speaking directly to them. The easiest way to do this is to use visuals that feature something that you know audience members value, something that makes them go: "I want that." Another option is to feature people or environments that look familiar, so landowners can see themselves and their lives reflected in your materials.

15

Images are not just for decoration—they can help you get attention, bolster your arguments, evoke emotions, and help your audience know that you understand them and their lives, thereby making them more likely to listen to you. Make sure to think carefully about each image you include and how it is contributing to the effectiveness of your materials.

FREE STOCK PHOTOS

As much as possible, try to use real photographs from your landscape and community in your materials. They are much more likely to ring true and signal inclusion and relevance to your audience. Until you build up a nice photo library, online stock photo libraries can meet your needs. Websites such as Flickr, SCX, Pixabay, and Shutterstock are good sources for images of people and landscapes. For more forestry-specific images, try Bugwood.org, ForestryImages.org, and the Forest History Society's photo database. Always check licenses to see how you can use an image and how the source should be cited. Images licensed through Creative Commons are usually available for use without a charge, and their website provides detailed information about what is required to use the image—restrictions often require that credit is given to the photographer or organization posting the image. There are also plenty of no-restriction public domain images, covered under the Creative Commons Zero (CC0) license.

15. Wounded Warriors Turkey Shoot, Lancaster, Tennessee, U.S. Army Corps of Engineers, 2011. Retrieved from: https://www.flickr.com/photos/usacehq/5658143051/sizes/l

6.3 Useful Design Tools

There are a lot of free, easy-to-use online software packages for developing professional-looking fliers, posters, and presentations. Examples include Canva, Vectr, Venngage, and Piktochart. Most of these websites offer a good selection of templates for the beginner and an ever-growing collection of tools to customize these templates or develop your own formats.

Most of us are familiar with Microsoft PowerPoint for presentations, but this program can also be an effective tool for creating materials. You can change the size and aspect ratio of the slide to match the type of material you are creating (e.g., 4X3 postcard or 8X11 trifold). From there, it's a simple matter of inserting text boxes, charts, and pictures to bring your postcard, flier, or poster to life.

Microsoft Publisher is a bit more sophisticated than PowerPoint but still has the relatively familiar user interface of all Microsoft offerings. If it's your first time using it, you may want to play around a bit or check out some YouTube tutorials, but you'll soon get the hang of it. You can do a lot with Publisher when you get used to it, and it plays nice with other Microsoft applications. This makes it easy to import and manipulate data from Excel or polish up materials originally created in Word.

Adobe's Creative Suite of products is versatile and powerful and is the go-to software for many designers. The cost of these products could have been prohibitive for small shops in the past, but the new line is fully accessible online through a subscription model called Creative Cloud. These tools can do a lot, but they also take a solid time investment to learn. Luckily, Creative Cloud has great tutorials and many community colleges have reasonably priced introductory classes for the software.

Building a website has gotten a lot more straightforward than it used to be. There are now a wide variety of do-it-yourself options that don't require you to be a wiz at coding. Options including Wix, WordPress, and Squarespace allow you to populate existing templates with your content. If you take some time to go through tutorials and instructions, you will soon be able to customize these templates to reflect your vision for your materials and/or the direction provided in your style guide.

A STYLE GUIDE FOR CONSISTENCY

Brands become recognizable and meaningful through repeated exposure. But exposure works only if there is sufficient consistency across all materials, events, and activities, so people link them to each other and to your program or organization.

A style guide can be a useful tool to help you and your partners communicate consistently, thereby raising awareness and recognition of your work over time. A style guide is a set of standards for the writing and design of your organization's publications. Depending on your program and materials, a style guide could include:

- Key language (dos and don'ts) for describing your program and the coalition.
- Visual rules for maintaining your organization's image and imparting a consistent tone and style to your materials. These include rules about the colors that communicate your organization's identity and how to use your logo. You might start with the dominant colors from your logo and, if needed, add a few accents (keeping to five or fewer).
- A selection of fonts and typography, and other graphical elements that are repeated across materials to drive home familiarity and improve recognizability.

Large companies can have style guides that are the size of small novels, but for smaller organizations, that isn't necessary. A simple page or two that outlines the visual guidelines and tone for your organization's brand can be a helpful reference for keeping materials consistent.

6.4 Working with Professionals

TYPES OF CONSULTANTS AND VENDORS

If this all seems overwhelming, there are consultants and vendors that can help you establish the look and feel of your materials and help you get the word out to your target audience. Here are some options to consider:

Your in-house communications team. This is a good place to start, because you may be able to get their expertise for free. Be aware, however, that the communications staff of many organizations is focused on brand development and public relations, which is very different from writing targeted, audience-centered marketing materials to inspire action. If you work with them, you will need to be very clear (and very firm) about your goals, target audience, and message strategy. Furthermore, since these professionals serve the whole organization, you may need to adjust your timeline to accommodate their availability.

Advertising agencies and strategic marketing firms. These types of companies usually deliver complete campaigns. You will likely work with an account representative, who will pull in researchers, strategists, and creative and media teams as needed. These firms are expensive but may be worth using if you have little or no in-house capacity to plan, design, and implement the campaign. Although the distinction is not always clear-cut, marketing and communication firms tend to pay more attention to delivering behavioral outcomes, while advertising agencies are better at designing clever, attention-getting campaigns that raise awareness of an issue.

Graphic designers. Graphic designers offer services ranging from developing a graphical illustration of your process to the complete design and layout of your poster, postcard, flier, or other materials. They will usually look to you for guidance on the desired look and feel of the materials and then deliver two to three design options. Once you choose a direction, they will implement it coherently across all campaign materials. You can negotiate a lump sum payment for materials or pay them by the hour.

Writers and editors. Everyone can write, right? But can you write in different styles, for different audiences, at different reading levels, using language that evokes different emotions? Can you communicate your ideas clearly and concisely? And can you ensure that your material has no grammatical or typographical errors? Enough said. If your budget allows, work with a writer, or at least an editor, to finalize content for important materials. Even if you have no budget, ask another person, preferably someone unfamiliar with your program, to review your materials for clarity and brevity.

Web designers. Web design requires two kinds of skills. The first is being able to design and implement the back-end functionality, informational flow, and usability of the site. The second involves the look and feel of the site—i.e., the presentation of the material. Many software developers or web hosts offer simple templates at little or no cost, and these may offer all the functionality you need. You can also pay a web designer a small amount to customize an available template, so it looks more professional. However, it is best to work with a full-service designer if you envision a multi-layered site with more complex functionality and interactivity.

You can also write your web content yourself, but it is useful to work with a writer or editor who specializes in writing for the web. Similarly, several graphic designers specialize in designing websites and/or web-friendly documents and graphics that integrate features such as scalability across formats, interactivity, and easy updates.

Media specialists. These are professionals and firms that specialize in getting messages out to specific audiences or via specific channels. Examples include social media and online marketing firms, traditional public relations firms, event organizers, youth marketing firms, minority marketing firms, and more. It makes sense to consult one of these firms if you are committed to getting the word out via a specific channel. There are also a few companies that have expertise in all these techniques and can help you determine the right mix of channels for your audience and message.

Printers. Often, the type of materials being created can dictate the investment needed for printing. Sending out individual letters to landowners? You'll be fine using the office inkjet. Want to send out a glossy, high-quality postcard? You'll want to explore the printing landscape. Office supply and shipping stores usually offer online printing services at low prices. Online options have also greatly expanded—you can simply upload your materials and receive the printed copies in the mail. Online print shops are quite inexpensive and usually provide materials of good quality, but you may not have the option to look at a test print for quality control.

Local print shops are disappearing, but if you have one in your community, it's definitely worth inquiring about available services. Small shops may cost more but offer more personalized service and experienced servicepeople. If you print frequently, it is worth developing a relationship with your local printer, so they understand your needs and preferences.

GETTING THE BEST FROM CONSULTANTS

Regardless of which type of consulting service you use, your collaboration with them will be much more successful if you get your house in order first.

1. **Be clear about the scope of work, budget, timeline, and mutual expectations.** If you have a limited budget, it makes sense to use consultants strategically, on tasks where you need the most help. However, be realistic about your capacity. If you set up the project as a collaboration, then make sure you have the means to get your part of the project done.

2. **Clearly communicate your overall goals and priorities for the project.** Most projects have multiple objectives, and that is fine, as long as you're able to prioritize these objectives. Also, tell the consultant about any design or technical parameters (e.g., compatibility with your organizational website, consistency with your organization's style guide, etc.).

3. **Be clear about the audience and message strategy.** Professionals such as writers, designers, and graphic artists are trained to bring your ideas to life, but you'll need to have your message strategy worked out so you can give them useful direction. At the very least, you need to be clear about your target audience, what motivators and barriers you anticipate, and the desired emotional tone of the message. You might also want to include ideas for other elements of the message, such as the attention-getter, proof points, images, etc. It's a good idea to write these down for the consultant. In fact, many consultants will ask you to fill out a creative brief, which explores many of these ideas.

4. **Get multiple quotes,** but make sure that they are for a comparable level of service. The cost of professional services does not vary widely in the same area, so if you have very disparate quotes, it may be that the consultants have understood the scope of work differently. Once you have identified two or three potential vendors (e.g., online or through referrals), explain what you need, and ask them to write up a short bid. Then have a conversation with potential consultants to determine how well they address your questions, what questions they ask, and how they respond to new information. Good consultants should be able to adapt their ideas and suggestions based on your feedback. They should also be able to give you several references. For larger projects, it may be useful to write up a formal RFP, which pushes you to think through what you need and present that to bidders in a standardized way.

6.5 Testing Materials

Testing messages and materials before dissemination is one of the most important things you can do to improve your outreach materials and avoid expensive mistakes. No matter how diligent and conscientious you've been about developing your messages, you can't know how audience members will interpret them until you ask. A message test is a systematic way of getting that information.

- It lets you test and validate key assumptions about your target audience. It helps guard against assuming that you know what your audience wants to hear.
- It helps you focus and improve your materials.
- If you've generated a few ideas, message testing helps to identify the message (or combination of messages) that is likely to be most effective with your target audience.

Even for experienced communications professionals who know their audience well, message testing is a common and valued practice, because it helps to refine messages and generates confidence in the final product.

WHAT TO TEST

It's always a balancing act to figure out how "finished" your materials should be before you test them. On the one hand, you want to know how your audience will respond to your final materials. On the other hand, you don't want to spend too much time and money developing materials if you're not on the right track. And while it's great to test different options, you might not have the resources to develop and test two to three different materials.

One way to address this is to test one finished message but have some alternative key elements of the message. Let's say you are planning to use a postcard for your outreach. You would first test your best version of the postcard and then focus on testing some options for key elements such as headlines, logos, and visuals.

Make sure the materials you test are brief enough for the landowner to digest in real time, so they can give you a meaningful response. If you're testing something more detailed (like a website or a book), then either give landowners time to read the materials (perhaps at home) or direct their attention to specific elements on which you want feedback (such as the cover page, title, format, etc.).

HOW TO TEST

The right method to test your messages depends on what you're testing. Generally speaking, it is better to conduct message tests in person or online, especially if you're testing images. Phone conversations can work for testing short, pithy headlines that can be easily read out.

You'll also have to decide whether to test messages with individual landowners or in a group setting. Generally speaking, it is easier to get people's honest reactions when talking to them individually. Group conversations can be very interesting and revealing but are also subject to peer influences and require greater facilitation and research skills.

Luckily, you don't have to test materials with a lot of people. Eight to 12 are usually enough. This is not an adequate representative sample in statistical terms, but based on experience, we know that responses from eight to 12 well-selected landowners will likely give you good information to validate your approach and refine your materials.

To have confidence in your findings, you must test your messages with landowners who are representative of your target audience for the program. This means reaching out to landowners beyond your immediate professional and personal circles. You can do this in many ways:

- Ask your colleagues or landowners you know to put you in touch with landowners they know. Just make sure that these aren't "model" landowners who are already converted to your point of view.
- Look at institutional records to identify land-owners in the area and call them.
- Go to community events where you're likely to find members of your target audience and ask people if they'd be willing to talk with you for 10 minutes. Maybe you could offer them a small gift, like a pen or hat, to thank them for their help.

To make sure that you're hearing from landowners that fit your audience, think of a few indicators of good fit. For examples, if you're targeting hunters, you can either recruit landowners who have hunting licenses or simply ask landowners whether they like to hunt before asking them to look at your materials. You can also include a few questions in the message test itself that help you determine whether these landowners are indeed the type of landowner that you're hoping to reach and influence.

WHAT TO ASK

A good questionnaire is precise and efficient. Resist the urge to cram in questions concerning everything you want to know about the landowners. Stay focused on testing the effectiveness of your message and the key elements that will drive landowner action.

Keep in mind:

- The most important thing in a message test is to learn why landowners said or think something. "Why/why not?" is a great follow-up question!
- Don't ask leading questions—i.e., questions that put words in the respondents' mouths. For example, instead of asking, "Does this make you feel confident?" ask, "How does this make you feel?" Make sure your questions are phrased neutrally.
- Don't explain, argue, or correct respondents, or encourage "good" feedback over "bad" feedback. Remember, it is their perceptions that you're looking for. Always be professional and neutral.
- Respondents should be asked to respond on their own behalf and not to speak for other landowners. It's up to you to make generalizations and draw conclusions.
- Avoid double-barreled questions. Double-barreled questions are two questions crammed into one statement. An example would be: "Would this be of interest to you and other landowners?"

SAMPLE QUESTIONS FOR A MESSAGE TEST

These sample questions are worded for testing a postcard, but you can adapt them to different kinds of materials.

Overall

Give respondents a copy of your postcard. Give them some time to look it over and then ask:

- On a scale of 1 to 5, where 1 means you "don't like it at all" and 5 means you "love it," how would you rate this postcard? (Follow-up question: Why do you say that?)

Text

- Please read the postcard carefully. Circle the parts that you like and strike out those that you don't like or find confusing. (Follow-up questions: Why did you circle "X"? Why did you strike out "Y"?)
- If you got this postcard in the mail, would you read it? Why/why not? (Possible follow-up question: What could we change that would get your attention so you would read it?)
- After reading this postcard, would you do anything? (Possible follow-up questions: What would you do? Why would you/why would you not [insert call to action]?)

Images

- On a scale of 1 to 5, where 1 means you "don't like it at all" and 5 means you "love it," how would you rate this picture? (Possible follow-up question: Why do you say that?)
- What do you feel when you see this? (Ask needed follow-up questions to understand their response.)

Testing Options

- If it had this [other headline/other image], would that be better or worse? (Follow-up question: Why?)
- If we added X logo, would that change your response?

7

GETTING THE WORD OUT

7 GETTING THE WORD OUT

Purnima Chawla and Steve Swenson

7.1 Achieving Multiple Touches

It is rare that a landowner will take a recommended action simply on the basis of one postcard, conversation, poster, or email. Behavior change usually occurs when a person hears about an issue and recommended actions a few times and, preferably, from different sources.

On average, it takes four to six interactions with your message to persuade someone to take an action. These “touches” can be a conversation or interaction, communication materials, or mentions in online or offline media. Some of these touches can be planned and delivered by you or your partners, and some could be fortuitous. The source, medium, and format of each touch; when it is received; and how it relates to previous touches all influence how your landowners respond to the message.

Consider, for example, landowner Jane, who has never encountered a service forester. One day, she gets a postcard in her mailbox inviting her to an event in her community where a service forester will answer basic questions about timber harvesting. She reads the postcard, considers attending the meeting, but tells herself she will decide later. A few days later, she reads an article in the local paper about how landowners in her area have rich timber resources but are often cheated of current and future earnings. The article mentions how foresters can help optimize timber earnings while preserving forest health. The next evening, she mentions the article and the event to her neighbor, who expresses an interest in going with her. When she goes back home, however, she realizes she’s misplaced the original postcard. Luckily, the next day, she receives another postcard urging her to attend the event and offering a phone number to learn more. This time, she makes the call and reserves seats for herself and her neighbor.

As this example illustrates, each exposure to campaign messages works cumulatively to increase the likelihood of action. This means that you should plan to deliver multiple “touches” to target audience members in a relatively short time frame (if touch #1 is forgotten by the time touch #2 happens, then you’re starting the process from the beginning).

To many natural resource professionals, delivering multiple touches sounds impossibly difficult. The solution is to think of landowner outreach as a series of discrete efforts designed to accomplish small goals. Imagine that your job is to encourage better stewardship by enrolling landowners in your state’s stewardship program. At that scale, planning to organize multiple touches for every landowner and then following up with interested landowners to deliver needed services probably requires more resources than you have. However, you can make the task manageable by setting targets for different locations and for different steps of your outreach.

For example, you might start with the goal of enrolling 30 people in a particular county. This allows you to focus your outreach efforts on a particular geography and target audience with enough specificity, intensity, and persistence to start engaging with 30 people in that county. Once that goal is met, you can move on to a different part of the state or focus on a different audience in the same area. Or you may decide that your outreach has generated enough qualified leads and you can spend the rest of the year deepening your relationship with these landowners and helping them implement good practices on their land.

It is more efficient to be goal-directed and focused in your outreach, so you can achieve the 4 to 6 touches needed to motivate landowners to take action. When the goal is broad or complex, it makes sense to break it up into several related outreach efforts, each targeting a specific audience, subgoal, or geography.

THINKING IN CAMPAIGNS

A campaign is a series of coordinated outreach activities designed to accomplish a specific outcome. An election candidate might conduct a campaign to achieve his or her election, an advocacy organization might conduct a campaign to promote desired laws or policies, and a company might conduct a marketing campaign to promote sales of its product. Your organization might conduct a campaign to increase riparian buffers along a local river, get landowners to put in firebreaks, get conservation easements on high-value lands, or simply get landowners to meet with their local foresters.

Campaigns are always goal-directed—i.e., they are implemented to bring about a specific outcome. In addition, they also have the following attributes:

- They involve more than one activity or event. Sending out one mailing or hosting one workshop doesn't usually qualify as a campaign. In part, this is because it is extremely rare that a single activity or event will get any audience to take the desired action. A campaign seeks to accomplish desired outcomes via multiple audience touches.

- Campaign events and activities are intentional, planned, and coordinated. Different elements of the campaign—e.g., materials, events, activities—are designed to play different roles in motivating action. For example, you may use a postcard and some media coverage to raise awareness of an issue; then host a meeting to discuss possible solutions with landowners; then schedule "how to" workshops and demonstrations to empower interested landowners to take the desired action.

- Campaigns are usually time bound. They have a start date and an end date. They may also have different checkpoints along the way, with different milestones to be accomplished by specific dates.

The scale and scope of campaigns can vary. They may be fairly circumscribed (e.g., getting landowners to plant buffers along a small stream), or they may be long and complex with several subgoals and planned subcampaigns to accomplish them (e.g., improving water quality in the Chesapeake Bay). The key is to have a planned set of activities that build on each other, to move toward the goal in an intentional way.

Organizing your outreach activities into discrete campaigns offers many advantages:

- It allows you to be more targeted and, therefore, more effective and efficient. Knowing what you have planned in the future reduces pressure to try and include all needed information and all audience interests in a single postcard, email or presentation.
- It encourages you to devote sufficient time to all the steps of your Ladder of Engagement and ensure that you're moving landowners toward the actions needed to accomplish your goals. You can first focus on bringing people into the program, and, once you have enough interested landowners, shift the focus to servicing them and supporting action.
- Thinking of ongoing outreach as a series of goal-directed efforts is also more rewarding for the team and encourages more learning and innovation. Each milestone that is met is cause to celebrate, and each new subcampaign is an opportunity to incorporate learnings from previous efforts to do a better job.
- Finally, this iterative process of accomplishing a goal, learning from the process, and then moving on to the next target is more motivating to staff than simply "doing landowner outreach" in an ongoing and repetitive way.

7.2 Planning Your Outreach Effort

Once you have decided what you want to say to your audience, you must decide how you expose your audience to your message with sufficient intensity to motivate them to take action. Here are a few considerations for planning how to get your message to landowners.

WHAT MATERIALS AND CHANNELS TO USE

Common media to deliver messages to landowners include brochures, postcards, letters, posters, presentations, websites, and social media. Each of these has its own pros and cons. In choosing among them, consider the following:

- How much information can the medium carry? A postcard, for example, can hold very little content. It is an excellent way to introduce an idea and get people interested in learning more. On the flip side, a website can be very content rich, but it may be useless unless you have good ways to drive your audience to it. Different media serve different purposes in your outreach. In general, consider using simpler materials, such as postcards, as "hooks" to engage people in content-rich materials, such as workshops or websites.
- How targeted is the medium? Some media—such as letters and phone calls—can be finely targeted to specific landowners. Others—such as newspaper articles and billboards—are more general and will likely reach many people beyond your target audience. In general, combining the two types of media delivers the best results. Getting your program, organization, or issue mentioned in local media raises its profile and creates an environment where personalized messages such as emails or letters are more likely to be opened, read, and believed. Using a gardening analogy, think of media coverage as fertilizing the soil to increase the chances that the seeds you plant will germinate and thrive.

WHO SHOULD DELIVER THE MESSAGE

When people get the same advice from more than one person or organization, they are more likely to consider it seriously. Enlisting influential individuals and partner organizations to promote, endorse, or reinforce your message helps achieve more repetition. It also increases the perceived acceptance and credibility of your program and its message. Recruiting more unusual or surprising messengers (e.g., a church leader supporting a stewardship practice) can also add to the salience and impact of your message.

Of course, the credibility of these messengers makes a difference, and it is important to realize that different types of landowners may consider different messengers more or less credible. We know, for example, that Woodland Retreat Owners assign high value to a professional's training and expertise, while Working the Land owners are more likely to trust people who live in the community and work the land as they do (see Section 4.3: The TELE Landowner Types). Think carefully about your audience's preferences, and use and cite sources who are credible for your target audience.

THE BEST TIME TO CONDUCT OUTREACH

How well people attend to your message and how persuaded they are depends, in part, on when people see and hear your message and what is on their minds at the time. Some of the contextual factors that affect how a message is processed are outside your control. But there are many things you can do to get your message to people when they are most likely to attend to it. For example:

- Send information about specific practices just prior to the time of year when people should be doing them.
- Use postcards and letters mainly as hooks to encourage people to seek more information. That way, they can access the more detailed information when they're ready to attend to it.
- Tie your information to local events or news items that are on people's minds.

WHAT MY WISCONSIN WOODS LEARNED FROM ITS DIRECT MAIL CAMPAIGN

My Wisconsin Woods (MWW) is a public-private partnership that has successfully reached thousands of unengaged woodland owners who have subsequently taken action to become more engaged with the management of their woodlands. MWW's relationship with these woodland owners was initiated through direct mail, sustained through e-communications and periodic mailings, and supported by a website. Thanks to the large number of landowners on its mailing list (140,000), MWW was able to try different approaches and sequences of mailings for subsets of landowners in its database. This strategy included sending different messages (such as those with a financial versus a wildlife focus), sending different offers (information versus forester visit), varying the timing (seasonal), and concentrating on different geographic areas. The key to MWW's learning, and its ability to incorporate the learning into subsequent outreach efforts, is a landowner database that it rigorously maintains.

Through diligent tracking of direct-mail efforts and landowner responses, MWW was able to learn a lot about its materials, offers, and timing, and thus was able to gather many useful insights about different aspects of direct mail. It used four waves of mailings to engage landowners who were new to the organization and its programs. The first was an introductory postcard designed to build awareness and familiarity. The following three included offers (either for information or a site visit) that required a response. The offers that required a response included a postcard with a business reply envelope, an enveloped letter with a reply mailer, and another quad-fold postcard with an additional promotion. All these materials were of high quality and similarly branded to promote awareness and credibility.

Overall response rates to offers of a free publication were around 20 percent, and for a free property visit, response rates were around 5 to 10 percent. When the landowner publication was included in the first mailing, the response to the second mailing offering a free property visit was higher. Overall, these response rates are quite high compared to the usual rates for direct mail campaigns (0.5 to 2.5 percent).

In MWW's campaign, across all offers and messages, it found that the highest response rates were achieved the second time an offer was presented. In addition, it found that a good rule of thumb for sending the next wave of mailers is to wait until the response from the previous piece has dropped. MWW determined that the first mailing—i.e., the introductory postcard—was helpful but not essential. Similarly, the last mailing (presenting the offer for the third time) increased the response rate by a very small amount, about 1 percent. MWW suggests that these can be dropped if your budget is limited.

7.3 Reaching Landowners via Direct Mail

Direct mail includes a broad range of printed pieces—enveloped letters, folded mailers, and large- and small-format postcards—that are mailed directly to target audience members.

WHEN TO USE DIRECT MAIL

Direct mail is an excellent tool to reach specific members of your target audience and track their responses. However, response rates to unsolicited mail from relatively unknown organizations are fairly low, and you should plan to send multiple mailings with consistency of offer, message, and branding to build recognition, trust, and conversion.

PROS ▲	CONS ▼
• You can target individual recipients (e.g., woodland owners on tax rolls, forestry program participants). • You can easily track the response rate. • If you send multiple mailings, you can generally assume that landowners are aware of your offer and lack of response signals lack of interest. • The mailout can be scaled to match your budget or response capacity. • If designed well, multiple waves of direct mail can increase brand awareness and credibility, even among non-respondents.	• Can be expensive, especially if you have to pay for a custom mailing list and are planning multiple mailings. • Mailing lists may need to be cleaned up and filtered before use. • Response rates on mail campaigns are typically low, about 1 to 4 percent. • Unsolicited communications are considered junk mail and almost half are never opened.

HOW TO GET GOOD RESULTS

- Direct mail works best when you have a good mailing list of people who are capable of acting on your offer and (hopefully) interested in doing so. Using existing contacts is easiest but doesn't reach new audiences.
- If possible, use first and last names of the recipients both in the address and in the salutation.
- While more expensive, first-class postage reaches more people, with address correction and forwarding, and is more likely to be opened. Because undelivered mail is returned to the sender, first-class postage will also help you track your response rate more accurately and update your mailing list.
- Direct mail pieces typically have a few seconds ("between the mailbox and the trash can") to get and hold the audience's attention. Therefore, they need to be well designed. Moreover, the quality of the mail piece often influences the audience's opinion of the quality of the program or service that you're offering.
- People give mail pieces only a quick read. So keep your offer simple and singular, and focus on the benefits rather than the details. Complex or multiple offers cloud the recipient's decision-making. Complicated response methods create unnecessary barriers to act.
- Response rates grow substantially when people receive your messages multiple times within a finite time frame. Mailings should be spaced close enough together to evoke memory of the prior mailing, but far enough apart to provide a needed reminder. Two weeks is often a good interval between mailings. Three or four mailings in succession usually evoke the best response, especially if they are timed well, similarly branded, and reaffirm the offer. Multiple mailings can heighten the importance of an impending deadline.
- Time your mailing to match the audience's interest and receptivity. For example, a good time to offer a forester walk-through might be in either spring or fall, when landowners are excited to be on their land. Likewise, avoid heavy mail periods, such as the holidays or election times, unless you can relate your offer to the mood or activities of those occasions.

METRICS TO ASSESS DIRECT MAIL CAMPAIGNS

- Responses received in total and as a percentage of pieces mailed
- Cost of mailing campaign in total and per individual exposed to the message
- Cost per respondent (i.e., total cost of mailings divided by the number of people who take the desired action)
- Variation in response rates per mailing within a multiple-wave mailing campaign

7.4 Reaching Landowners via Local Media

Local media refers to placement of campaign messages or related stories in newspapers, radio channels, or TV programs associated with specific geographic communities (local, regional, or statewide). This placement can be free, or you can purchase media spots. Placement can also be customized to reach specific audiences.

WHEN TO USE LOCAL MEDIA

Local media works well to promote a one-time event, such as a local meeting—perhaps to kick-start your program or campaign. It is also ideal for creating broad awareness of an issue or your program. Consequently, it works well in conjunction with other channels designed to directly communicate with your desired audience (e.g., direct mail, phone calls, etc.). Local media can create familiarity, credibility, and a positive orientation, which increase the response rate to direct asks (e.g., by mail or in person). It also helps by creating a social norm—even the people who don't take action may have learned something from the media coverage, and they may encourage others to take action.

By itself, local media is not a very good mechanism to inspire behavior change, in part, because it is not suited for reaching people in a targeted way. As your target audience or target behavior gets more specific, local media will be more appropriate as a supplement to more targeted marketing.

Finally, note that broad publicity about your program is not always a good thing. In some (albeit rare) cases, raising awareness about an issue or program can solidify opposition and result in more competing or contradictory messages. If that backlash is possible, you should not use local media. Instead, stay under the radar and work in more targeted ways to influence your landowners.

PROS ▲	CONS ▼
• Local media are widely available in most areas. • They are not hard to access. Editors like developing storylines about programs that benefit their readers or the community at large. • They are a good way to create broad visibility and brand awareness. Media coverage adds to the credibility of your organization and program. • Local media coverage increases audience receptivity to more specific channels, such as door-to-door or direct mail.	• Paid media spots can be expensive. • Unless you're purchasing media spots, you have limited control over when and where your message will appear. • There is no guarantee that members of your target audience will see the message. • Many people who are not in your target audience may also see the message. They may then contact you for unrelated information or services. • It is difficult to connect broadcast media to individual requests or behavior change. You can ask people how they heard about you, but that is often not accurate, especially if you've used multiple channels.

HOW TO GET GOOD RESULTS

- Local media works well when you can tie your project and desired landowner actions to broad issues that concern the general public. This makes the story more attractive to media publishers and more relevant to readers and viewers.
- Rather than sending out a press release, take some time to work with your local media staff to shape and develop a story that is relevant to their readers and makes the key points that you want to convey. One well-written story that places your program in context and describes its benefits is more impactful than several announcements in local papers.
- Response rates to a media call to attend a meeting will be much higher if the meeting is about a timely or controversial issue.
- Local media is a more efficient channel when there is a lot of overlap between your target audience and the viewers and readers of that specific channel. If most of the media viewers and readers are not members of your target audience, not only is this outreach channel inefficient, but it can also lead to irrelevant calls from unqualified prospects.

METRICS TO ASSESS LOCAL MEDIA CAMPAIGNS

- Number of media impressions (i.e., number of readers or viewers reached)
- Proportion of media impressions that are target audience members (this information may be available from the media outlet, depending on how your audience is defined)
- Cost per individual reached
- Cost per respondent

7.5 Reaching Landowners via Phone

Phones calls include calling people who are already acquainted with your organization and have given you permission to call them. The method also includes calling people who don't know your organization (and whose contact information you may have purchased or acquired from a partner organization).

WHEN TO USE PHONE CALLS

Phone calls are a one-on-one personal interaction capable of deepening relationships and commitments to act. Calling people who are already engaged with your organization is a great way to demonstrate customer service and care in an ongoing relationship. But expectations for phone calls should be checked against the depth of the relationship. Cold-calling contacts can be effective for introducing a program, informing people about an event or resource, and getting permission for more detailed interactions (e.g., sending more information or setting up a meeting). Phone calls rarely result in real action commitments. In any case, given people's wariness of phone solicitations, persistence may be necessary to get people on the phone and overcome their skepticism sufficiently to advance the relationship.

PROS ▲	CONS ▼
• Cold-calling can be a good channel for delivering personalized information and persuading people to take action. • The method is also good for forging and improving relationships with landowners. This is a great way to follow up with existing customers, learn more about them, strengthen the relationship, and increase their interest in what you offer. • If you are buying a telemarketing list, you can customize it to get people who more closely resemble your target audience. • This is a great first step to soliciting buy-in and assistance from a few "high-value" landowners who can help jumpstart your program.	• Cold-call telemarketing has a negative perception and can elicit a negative response from audience members. • Telemarketing lists can be expensive and may not be up to date. • Many people do not answer phone calls from numbers that they don't know. • This channel does not reach people with unlisted phone numbers.

HOW TO GET GOOD RESULTS

- A personal phone call is best placed after at least one high-quality interaction, preferably a face-to-face meeting. If the recipient has provided you their phone number, a call may even be expected and appreciated. A timely follow-up call can reinforce and advance your previous conversation and increase the landowner's commitment to working with you.
- Cold calling can be effective if your offer is well tailored to the needs of the people you're calling. For example, if you are offering landowners a management plan that qualifies them for tax benefits, you will have a higher success rate by calling landowners who have recently requested information about tax programs than if you're just calling landowners in general.
- The success of a phone conversation, especially a cold call, depends on the quality of your script. Your script should include, for example, a greeting and introduction, what qualified them as a contact for you or some reference point, the benefits of your services, and a transition to a question to engage the landowner in dialogue. The script should also anticipate and accommodate different landowners' needs and the different directions the conversation might take, including addressing landowners' questions and concerns. The script should be well rehearsed so that the caller can work it into a casual and comfortable conversation.
- It is very important to be realistic about what can be accomplished in the first phone call. Phone calls, especially cold calls, are for starting the relationship and perhaps securing an expression of interest. They are not sufficient to accomplish behavior change. Getting a landowner to agree to a meeting or take a first step, such as accept materials from your organization, is a great result. Be prepared to offer these specific action steps to interested landowners.
- While this differs by audience, phone calls are generally more successful on Thursdays, Wednesdays, and Tuesdays—in that order—with Mondays and Fridays best avoided. Early morning and evening are often the best times to reach people at home.
- Understand that the vast majority of people will either not answer their phones or not want to speak with you. Be prepared for that and don't take it personally. It is important to stay positive and enthusiastic, because those emotions are communicated to landowners in your voice.

METRICS TO ASSESS PHONE CAMPAIGNS

- Response rates as a total number and percentage of calls placed
- Percentage of calls that lead to qualified respondents (i.e., people who fit your target audience)
- Percentage of calls that lead to favorable responses
- Cost per respondent (i.e., total cost of phone campaign divided by the number of respondents who take the desired action)

7.6 Reaching Landowners via Email

This category includes a broad range of messages delivered by electronic means, including personal emails, group messages, e-newsletters, and e-magazines. In addition, emails offer the option to link to other electronic media, such as websites and event sign-ups. The audience for these communications could be one person or many.

WHEN TO USE EMAIL

Email is one of the most efficient communication channels in terms of return on dollars invested. Provided your audience is connected to the Internet and is comfortable with online media, email is a great way to reach people quickly and drive them to your website or make specific offers. It can be used to grow brand awareness, generate leads, and broadcast information in a timely way. It is also a great way to test different offers, because it can be tracked and results are available fairly quickly.

Because email is inexpensive, it tends to be overused. As a result, people are directing more and more email to their trash or spam folders.

PROS ▲	CONS ▼
• Email is an inexpensive and scalable mechanism; it's good for maintaining contact with large audiences. It's also good for building brand awareness and/or demonstrating expertise (even if the email is seen and not acted upon). • Email offers the opportunity for immediate, timely, and ongoing communication. Events and deadlines are easily promoted. • Electronic communications can be seamlessly integrated across all electronic devices, phones, tablets, and computers. • Emails can carry a decent amount of content. More importantly, they can be used to drive traffic to more detailed information, e.g., on your website. • Content of electronic communications is easily shared through peer networks. • Tracking use and patterns is easy (through opens, clicks, and unsubscribes). • Because emails are inexpensive and immediate, it is very easy to test responses to different messages.	• Emails are not a reliable way to reach audiences. It is common to see open rates of only 10 to 20 percent. • It is time consuming to generate consistent, quality content that will enable your emails to stand out from the deluge of emails that most people now receive daily. • Email needs to be handled skillfully. Too much electronic communication can damage customers' perceptions of your organization or agency. On the other hand, if communication is too sporadic, the audience might view the organization as inconsistent. • This is not a good channel to find new customers. You need to build your own list of people expecting your content. Buying lists and sending unsolicited emails will increase the chances of your emails being blacklisted and sent to the spam folder.

HOW TO GET GOOD RESULTS

- The success of email as a channel depends on a foundation of contacts who have opted in to receiving emails from your organization. Be committed to building those contacts honestly and over time. Do not try to short-circuit this process by purchasing email lists, many of which are compiled fraudulently. Although anti-spam laws technically apply to commercial activity, there is no specific exemption for nonprofits. Sending unsolicited emails damages your organization's credibility and may even earn you a hefty fine.
- Maintenance of the email list over time is also an important consideration. On average, 25 percent of your email list expires each year. It is good practice to provide an unsubscribe option to readers. If a lot of people mark your emails as spam, it damages your credibility score, a factor that spam filters use to identity spam. If your credibility score falls low enough to trigger common spam filters, even people who want to read your emails may never see them.
- It is good practice to have a series of emails that are sent out automatically when new customers sign up to receive communications. These emails should carry some of your more compelling information or offers to demonstrate value to them immediately.
- Research shows personalization increases email effectiveness. Emails can be personalized even with large distribution lists, pulling names from a database for the greeting. Likewise, the sender can be personalized for a given list of contacts to increase likelihood of opens and clicks through e-newsletter software.
- Subject lines should be 15 words or fewer and should not contain words that may trigger spam filters (e.g., "free," "amazing," "this isn't a scam," etc.) or are purposely deceptive (e.g., "you have won").
- Although email seems to be a less formal medium, take care to develop meaningful content and present it in an attractive format. Simple mistakes that otherwise would have been eliminated through proofreading reflect poorly on the quality of your content and offers.
- Your emails will be much better received if you are able to tailor them to be relevant to audience members. As an example, if you're sending a second email to ask people to take some action (e.g., fill out a survey), send that reminder to people who have not yet taken that action. And send a "thank you" email to those who have.
- Consistency in the format, sender, and other elements makes your emails instantly recognizable and works to build your brand among list recipients. Every email should allow readers to click through to your website and should have brief subject headers that follow a similar format. E-newsletters should directly link to relevant information on your website. Any call to action should be clear and should be prominently placed near the top of the email.
- It is important to test your emails on a variety of devices (computers, laptops, tablets, and phones) and operating systems to make sure your messages are clear and attractive in different formats.

BALANCING LIST QUALITY AND SIZE

Email lists are compiled slowly, by harvesting emails from every online, phone, or in-person contact with members of your target audience. You can also post offers on forums, newsletters, or social media sites where audience members are likely to be; the idea is to get them to contact you and give you permission to email them.

How you collect, manage, and use email addresses influences the quality of your list. For example, a pop-up on your website that promotes your e-newsletter is a great way to actively acquire email addresses from potential customers. However, you might choose for a "double opt-in" by sending an email to everyone who signs up on the website, asking them to confirm receipt. This additional opt-in lowers the number of contacts acquired by about 20 to 30 percent, but it builds a higher quality list of contacts by weeding out bogus email addresses.

METRICS TO ASSESS EFFECTIVENESS OF EMAIL CAMPAIGNS

Indicators of the quality of your list

- Your bounce rate is the total percentage of your emails that were unsuccessfully delivered. When your bounce rate is more than 5 to 10 percent, it's time to update your list.
- Delivery rate is the inverse of bounce rate. It is total emails sent minus those that bounced, divided by the total emails sent. This should be around 95 percent.
- Your spam complaint rate reflects the number of email recipients who marked your email as spam. This rate should be very, very low; corrective measures should be taken if it is 1 percent or higher.
- Your list growth rate is the number of new email addresses acquired per time period. You will need at least a 25 percent growth rate just to counter attrition due to opt outs and abandoned email addresses.

Indicators of audience engagement and response

- Your open rate (the percentage of the total emails opened by recipients) and click-through rate (the percentage of people who clicked a link in your email) are important indicators of how well your audience is engaging using the email content.
- Your share rate is the percentage of people who forward the email to a friend.
- Conversion rate is the percentage of email recipients who take desired actions. If the desired action was a donation or a purchase, you can also compute revenue per email.
- Your unsubscribe rate is the percentage of people who opt out of receiving your emails in the future.

7.7 Reaching Landowners via Social Media

Social media refers to a broad collection of interactive technologies and platforms that allow people to share ideas, photos, information, games, or assessments with peers. It includes blogs, social networks, platforms such as Facebook and Instagram, online gaming, and sites that support collaboration and information sharing. Social media platforms allow for user-generated content and interactivity and facilitate connections and networks among users.

WHEN TO USE SOCIAL MEDIA

The use of social media in forestry is relatively new, but catching on fast. With more and more people—including rural and older people—now on social media platforms, this channel can be a useful way to keep your community connected and sustain attention on your issue. Social media is more suited to sustaining existing affiliations than creating new ones. However, if you have a truly compelling offer, advertising on social media platforms can help you reach a new audience. Similarly, truly extraordinary content may be shared by audience members, thereby expanding your reach.

PROS ▲	CONS ▼
• Social media is an inexpensive and scalable mechanism; it is good for maintaining contact with a community of interested and engaged people. • Social media offers the opportunity for immediate, timely, and ongoing communication. • It fosters peer connections, which can be an important factor in keeping people engaged and active in your program. • In rare cases, advertising a compelling offer on social media or placing “shareable” compelling content can attract a host of new constituents to your network. But you will need to work hard to translate these “clicks” into sustained interest.	• Creating a steady stream of attention-getting content that stands out from the competition is time consuming and requires specialized expertise. • Constantly rolling, transient “feeds” make this a relatively unreliable way to reach an audience—people may or may not see your post, depending on when they check their feed. • Social media is most effective when it generates interaction among users. This is very difficult to initiate and sustain. • Social media elicits fragmented and momentary attention. It is not a good medium for in-depth conversations or education. • Social media platforms are not a very targeted medium. Your social media ads and posts will probably reach many people who are not in your target audience. Conversely, it is hard to know which platforms audience members frequent or how many of them will follow you on a particular platform.

HOW TO GET GOOD RESULTS

- Social media commands shallow, fragmented attention. So keep your message short. Be clear about what you want to convey, and do that in a direct and immediate manner.
- Visually rich information is better. On social media, pictures (and videos) speak a lot louder than words.
- Use this medium as part of an integrated mix of channels in a way that plays on its strengths. For example, social media is good for inviting people to events or conveying a quick, eye-catching factoid or video that keeps people connected to your organization or issue. People who are browsing their Facebook or Twitter feeds are usually not in a frame of mind to click through to a detailed, substantive article on a particular issue.
- Meet people on the channels and platforms where they are. It is very difficult to persuade audience members to sign up to a new platform, even if that provides customized functionality or a better user experience.

METRICS TO ASSESS EFFECTIVENESS OF SOCIAL MEDIA CAMPAIGNS

- Number of followers—i.e., people who have given you permission to speak to them
- Cost per respondent for social media campaigns—i.e., the total cost of your ad campaign divided by the number of people who contacted you as a result of that campaign
- Overlap between your social media audience and participation in your programs—e.g., proportion of people who “follow” you online and attend workshops, request informational materials, or take other suggested actions

8

EVALUATION AND LEARNING

TOOLS FOR
ENGAGING LANDOWNERS
EFFECTIVELY

8 EVALUATION AND LEARNING

Alanna Koshollek and Katherine Hollins

8.1 Approaching Evaluation with a Learning Mindset

Evaluation and learning are integral to audience-focused communication. These processes provide insights for better decision-making, and ultimately enable you to be more efficient and effective in your work.

Rather than treating evaluation as something that happens after the outreach, think of it as an ongoing feedback mechanism that lets you check your assumptions about landowners' preferences (see Section 4.5: How to Develop an Audience Profile) and gives you information about what's working well and what isn't. When you incorporate this intelligence into your outreach efforts, you will be more successful. Of course, evaluation is also essential for establishing when you meet project goals and milestones, and enables you to communicate the value and impact of your work.

ESTABLISHING LEARNING QUESTIONS

Incorporating evaluation into your work is often more a matter of mindset than money or time. To successfully integrate evaluation into your project, it helps to clearly define what you want to know and what you will do with that information.

Start by asking: What do we need to know to be more effective, efficient or impactful?

This line of thought might yield specific learning questions, such as:

- Are "town hall" style meetings the right way to get our message to landowners? Would smaller meetings at a coffee shop work better?
- Should we continue to invest in radio ads?
- Is our message working just for the target audience segment or does it have broader appeal?
- Did we anticipate and address the main barriers to action?
- Are we achieving the desired landscape changes?

If you're working in collaboration with other organizations, make sure that your project team discusses these questions and agrees on them, because they are important in shaping your evaluation effort. They will guide your data collection (see Section 8.2: Selecting Metrics and Collecting Data) and determine how the data is analyzed, reported and used (see Section 8.3: Harvesting Learnings and Adapting Your Work). They may even influence how you conduct your outreach. For example, if you want to compare different motivators, you could gain some insight from sending one mailer with a hunting focus and another with a money-saving focus, to see which one garners more responses.

Because your time and budget are limited, consider what information will influence your work the most. Perhaps you're pretty sure about the channels you will use but are less sure about what drives landowner actions. In that case, you can put minimal effort into tracking and checking your channels, and more time and money into understanding why landowners did or didn't respond to your materials. In addition to helping you focus your limited resources, establishing your learning questions can help the whole evaluation process feel less overwhelming.

> Identifying learning questions will help you keep your evaluation work manageable and ensure the results are useful. Spend some time early on thinking about what information will help you do better in the future.

8.2 Selecting Metrics and Collecting Data

Your evaluation methodology—i.e., the metrics and indicators you collect and how you collect them—is determined by what you want to know (see Section 8.1: Approaching Evaluation with a Learning Mindset), the channels and materials you're using to get the word out (see Section 7.2: Planning Your Outreach Effort), and what you are asking your audience to do (see Section 2.2: From Project Goals to Landowner Actions).

EVALUATING LANDOWNER ACTIONS (AND REASONS FOR ACTING)

Your learning questions help direct your focus. In the most basic evaluations, learning questions are often concentrated on your outreach process and initial outcomes. In these cases, you would probably want to track what you did (e.g., How many mailers did you send out?) and how the landowners reacted to that (e.g., Did landowners call you in response to your mailer?).

Further along in your process, your learning questions may be more focused on landowners' progress along the Ladder of Engagement. Conservation and stewardship behaviors often involve a series of preparatory steps that can be tracked. For example, if your landscape goal is "healthy forests through active forest management," you can track interim landowner actions such as: landowners' requests for more information about active management, attendance at "how to" events, or signing up for cost-share in anticipation of taking action. If you did a good job of ensuring the desired landowner actions were specific, measurable, and time bound (see Section 2.3: Choosing SMART Objectives), it will be easier for you to track them.

If you are working through a partnership in which someone else is responsible for engaging with landowners at the next step of the Ladder of Engagement, you will need to coordinate with them to make assessments or be satisfied with collecting data that is publicly available (see Section 3.4: Managing the Partnership, subsection: Evaluating Shared Efforts). For example, in some states, you can access public information related to the number of people enrolled in cost-share programs, stewardship plans written, or thinning harvests completed.

At the next level of complexity, you may want to know more about what is behind landowners' decisions and responses, so you can improve your outreach the next time around. This requires going beyond counting response rates and instead, connecting with responders and non-responders through surveys, one-on-one interviews, or focus groups. Through any of these methods, you can gain more information about why someone responded (or did not), including their main motivations or barriers to taking action.

GETTING INSIGHTS FROM YOUR AUDIENCE

Surveys are good for collecting quantitative data about what people have done or what they know, and answering questions such as: How many acres are being managed for invasive plants? How many people know about cost-share opportunities? etc.

One-on-one interviews provide richer stories and insights that help you understand why people think or act in certain ways. They can answer questions such as: Why do people own forested land? How do landowners feel about prescribed fire? Why did landowners not attend a meeting to which they were invited? etc.

Focus groups allow you to understand people's thoughts and actions, but they also capture the discourse between landowners. While this can influence an individual landowners' perspective, the discussion can be useful when you want to understand how the exchange of information will shape the collective opinion on an issue.

With any method, the more people you capture data from, the greater certainty you have that the findings are representative. However, collecting large quantities of data isn't always practical, and there are still benefits from asking a few landowners to share their perspectives, as long as you understand the limitations of the data. Your evaluation doesn't have to be perfect or totally comprehensive to be informative and useful.

EVALUATING DISSEMINATION CHANNELS

Many important learning questions revolve around the effectiveness of different channels to get the word out to landowners. Targeted channels with direct response mechanisms provide the simplest opportunity to evaluate channel effectiveness. You can easily track who you send mailers to and who sends back your reply card, or who attends your talk and who comes up afterward to request additional information. Broadcast channels, such as billboards or newspaper ads, with unknown direct impressions are more difficult to assess, particularly if your channels overlap in time and geographic reach.

If you used multiple channels or messages for your outreach, it is often useful to vary their use over time or geography, so that differences in response rates can be tied back to a channel's reach and effectiveness. To get clearer data, you can also directly ask the respondents how they heard about you, or what made them reach out to you. By combining this information with the cost of using a particular channel, you can assess your return on investment and decide whether you think it would be a good idea to use particular channels or messages again.

EVALUATING PROJECT IMPACT

When thinking about measuring the landscape impact of your work, it's important to remember that changing people's behavior takes time, and it takes even longer for human actions to translate into measurable environmental impacts. The complete impact of your outreach may not be apparent for several years, or it may be subsumed by factors beyond your control. However, if you truly believe in the work you are doing and the landscape goals you are working to achieve, you must find ways to assess the impact of your work. Here are some that others have found useful:

- Partner with other organizations to gather landscape data or identify proxy measures that help you see the bigger picture. For example, in some regions, the Audubon Society enlists volunteers to do annual bird counts, which allows it to compare populations before and after management actions.
- Use GIS imagery to review information about land cover and previous management activities. Are you able to assess any trends over time or compare between regions that did and didn't receive your intervention?
- Use data collected by other organizations, including government agencies or your local colleges and universities. In some cases, you might even be able to work with your local educational institution to track relevant ecosystem impacts.

If you aren't seeing the landscape impacts that you expected, you will need to figure out what is causing the gap between the landowner actions you are pursuing and the landscape outcome. These are big, complicated questions, and you may not always have good information to answer them decisively. But it is important to use available data to have these discussions, because they have important implications for your program. Here are some examples of ways to think about closing the gap between actions and landscape outcomes:

- You may determine that you're not yet seeing an impact on the landscape because not enough landowners have taken the desired actions. That means you need to push harder to reach and convince more (and different) landowners.
- You may realize that landowners are not taking meaningful actions or aren't doing them in the most impactful way. You then have to change the focus of your outreach to get landowners to the "right" actions.
- You may determine that the actions aren't being done in the right places. This may mean that you need a different outreach strategy to target the appropriate geography and ensure the message is clear about where the actions should take place.
- Finally, maybe you are having an impact on the landscape, but that impact is being negated by a new and different threat. For example, you may be successfully preventing agricultural runoff, but the water quality in the stream may be affected by a new streamside factory. That determination affirms the value of your work, but also points to the need for a new effort to directly target industrial or zoning practices in the region.

8.3 Harvesting Learnings and Adapting Your Work

The main purpose of evaluation is to inform future work. However, that rarely happens on its own. Like most learning, it helps to be intentional.

SHARING INFORMATION WITH COLLEAGUES AND PARTNERS

Often, one person or a small team is in charge of collecting and analyzing data, but a larger group is tasked with making decisions based on the results. In such cases, it's important to be thoughtful about what data is shared and how that is done. Presenting too little can leave your partners questioning the value of the evaluation effort or lacking enough context to make decisions. Too much information can leave partners feeling overwhelmed and unsure about what is truly important.

To get started, it can be helpful to think back to your original learning questions that guided your data collection (see Section 8.1: Approaching Evaluation with a Learning Mindset). Consider what data will help answer those questions, and pull that specific information from your qualitative and quantitative studies. For example, if your learning question was about barriers to action and you have action rates and a handful of landowner interviews, consider looking at action rates related to each intervention and pulling one or two quotes from landowners who did and did not take the action. These quotes should be illustrative of the reasons that most felt they could or couldn't take the action. Similarly, If your learning question was about the effectiveness of a how-to workshop, the number of attendees is less important than their post-workshop evaluations of the workshop, your six-month follow-up with them checking in about how things are going, and any new questions they have.

See the box below for more tips on how to organize and present evaluation data so that your colleagues can absorb it and use it to make good decisions.

REPORTING EVALUATION RESULTS TO COLLEAGUES AND PARTNERS

- Use a format that aids in learning and decision-making; consider a webinar, one-page executive summary, or a PowerPoint presentation. Consider creating tailored reports for different stakeholder groups, if their roles (administrator, leadership, investor) and the data they need are different.
- Front-load the report with information most relevant to inform decision-making.
- Include enough data and background to be transparent about your methods and limitations, but remember that an evaluation report is not a scientific report and does not need to include all the data you collected.
- Ensure ideas and decisions are recorded and referenced when planning future projects.
- Include questions that lead your partners to reflect on the data and arrive at their own conclusions and recommendations. Allow time for the group to discuss questions such as the following:
  - What findings surprise you?
  - What findings will be most useful as you make decisions? (This will also give you insights into what information is valuable to collect in the future.)
  - What new questions do the findings raise for you?
  - With this information, how might we do our work differently?
- Encourage your partners to ask their own "what if" questions and challenge assumptions.

USING EVALUATION DATA

One of the biggest benefits of evaluation is that it helps you prioritize where to invest resources in future interventions or supports for landowners. For example, if indicators show that not enough people are receiving your message, you'll know to change or step up your outreach activities. If enough people are being reached but they are not taking the desired actions, then you should revisit your message strategy or the action you're asking people to take. And finally, if people are taking the recommended actions but you're not seeing the expected impacts on the land, then it is time to take a hard look at the desirability of the recommended action or explore other factors that might be affecting your conservation goals.

In particular, tracking landowners as they progress along the Ladder of Engagement (see Section 2.2: From Project Goals to Landowner Actions) allows you to identify barriers and bottlenecks along the way. When you identify a step that landowners often aren't taking, you can focus additional evaluation efforts there to understand barriers to action and possible solutions to these barriers. For example, if you know that you are reaching plenty of landowners with your outreach message, and getting a sufficient number to invite you for a consultation on their land, but you see that few of them are completing the work you recommend, you could put some of your evaluation effort into figuring out why not. Is it that they don't believe your recommendations are tailored for them? Is it that they don't have the skills to do the work themselves? Are they unsure of how to hire someone to do the work? Or did they simply forget?

With this additional information, you can adapt your programming to focus on the supports that are most needed—e.g., building trust, hosting how-to workshops, providing guidelines on choosing qualified contractors, or sending email reminders that say, "October is the perfect time to cut and treat your honeysuckle." You don't have to remove every barrier for every landowner, but you can conduct a survey or several interviews to find the one or two supports that will facilitate action by more landowners.

Use your learning questions to think about how to analyze evaluation data to yield useful, usable information. And remember to make the time and space for your partners to reflect on this information and what it means for your work.

TRACKING LANDOWNER RESPONSE ACROSS CAMPAIGNS

The usefulness of evaluation data is multiplied many times over when you combine your tracking across different outreach efforts and programs over time. Collecting data on the landowners in your project area over time can help you see cumulative progress across different outreach efforts, and understand how to approach different landowners more effectively in the future.

For example, let's say your goal is to increase the number of acres being sustainably managed within a given landscape. This will require multiple touches over time, with different campaigns to different landowner types who are at different stages of readiness for action. Knowing that a postcard about improving turkey hunting got a 15 percent response rate, or that a workshop about how to hire a forester resulted in 25 follow-up phone calls, helps you evaluate each of these efforts individually but doesn't say much about the progress you're making on your landscape goal.

The solution is to use a database or tracking system that includes all the landowners touched by your various campaigns and then monitor their engagement over time. With this, you can see how landowners are progressing along the Ladder of Engagement (see Section 2.2: From Project Goals to Landowner Actions) and calculate useful metrics, such as:

- Across all outreach mechanisms (e.g., direct mail, workshops, and fair booths), we have contacted 500 unique landowners in the region, accounting for 20,000 acres.
- 40% of these landowners have been contacted two or more times.
- 30% have requested management plans.
- 10% have conducted some management activity on their land, cumulatively affecting 2,500 acres.

The information in your database gives you valuable information about actions landowners are taking, how engaged they are with you, and who might be prepared to take the next step. It can also help you to get a sense for a trajectory of action that you can then compare with the Ladder of Engagement that you thought was most typical. Armed with this data, you can make informed decisions about where to focus your efforts next (e.g., should you try to reach an entirely new audience, reach non-responders with a different message or action, or continue to follow up with responders and move them to the next step?).

It also tells you which landowners responded to which campaigns and messages. This allows you to reference the same landowner or family to see how you have reached out to them in the past, and what sort of outreach or programming engaged them. It also helps you to see patterns—for example, families with young kids tend to like weekend events over week-day; or landowners with smaller acreages tend to respond well to do-it-yourself programming. If you have any landowner data (such as acreage size, education level, age, memberships in partner organizations, or absenteeism), you can compare responders and non-responders to see if there are any factors that seem to make a difference. This information can help you tailor future efforts. If you're getting data that doesn't quite make sense to you, it may be time to conduct a few informational interviews or small focus groups to understand what's going on.

Over time, this kind of database-level information can help you establish benchmarks for your work. As an example, let's say that you know from past efforts that 25 percent of the people who request additional information take the next step of hiring a contractor. This year, if 100 people request additional information, you have a good indication of how many will take action. Moreover, if your expectations don't match with what you see, you can look into the reasons why you got an exceptionally high or low follow-through.

Finally, a database can also help you maintain communication with your audience (e.g., through a newsletter or website), to keep a relationship with them even if you aren't asking them to take any immediate steps.

8.4 Creating a Culture of Learning

Fostering change in your organization or partnership begins with creating a culture that is fueled by learning and continuous improvement. Small changes may occur organically due to motivated individuals who take initiative to modify their approach. However, bigger changes may involve altering the way your organization or partnership does its work —perhaps moving away from familiar landowner engagement strategies or even shifting staff duties or landscape priorities. This requires investment and buy-in from many people and a willingness to change the existing systems and processes.

Developing this buy-in takes time and trust, but involving partners in the exploration of findings and brainstorming ways to integrate the findings often result in a deeper level of commitment to apply these learnings to future work. Understanding how the findings are relevant to the individual organization and the partnership also helps contribute to buy-in.

Here are a few strategies to consider to help build this buy-in in your own organization or partnership.

- Infuse evaluative thinking into your workflow. Involve partners in determining the learning questions for a given project, share relevant findings promptly and in a format that is useful to partners, and involve them in the interpretation of the findings and decisions about what should be done differently in the future (see Section 8.3: Harvesting Learnings and Adapting Your Work). Ensure planning timelines allow evaluation efforts and data to inform next steps.
- Establish open communication processes and be transparent about how decisions are made. Trust is a key element for change. Encourage partners to discuss roadblocks and lessons learned, and to share the challenges they face. This allows all partners to learn from each other and support each other, and helps the partnership ensure forward movement.
- Identify people in the group who encourage trial and error and challenge a business-as-usual environment. Nurture them to become champions for improvement and innovation, pushing the group to have a greater impact. Their ideas may be risky or challenging, but they can also deepen and broaden the discussion to yield new insights and strategies. Even if their ideas are not adopted, these individuals can help other people feel more comfortable with uncertainty and more open to new approaches.
- Accept that innovation carries the risk of failure. Help everyone in the partnership to understand that it is acceptable to try new things, some of which will not create the anticipated results. As long as those ideas are incorporating the best knowledge you have, and you are able to gather learnings from any failures, you can continue to improve.
- Ensure the ideas and decisions of the group are captured and shared with the group. This could be done as informally as posting a list for everyone to see at the end of a meeting. At future planning meetings, the decisions can be revisited and incorporated. It is often helpful to have the person responsible for the evaluation present at planning meetings to provide any needed context around the decisions and remind everyone why they were made.

With an attitude of continuous learning, you will find many opportunities to identify questions, collect information, and incorporate lessons. As you track your effort and interactions with landowners over time, each campaign becomes an opportunity to hone future work. When something does work, when you find a new shortcut on the Ladder of Engagement, or a landowner resource that really boosts adoption of a stewardship practice, share it. Also share your results when you try something that doesn't work—that is also helpful for others. We're all working toward better conservation and stewardship, and the more we can share lessons and inspiration with each other, the more efficient we all can be, and the faster we will reach those big landscape goals.

IN CLOSING

Private landowners are essential to accomplishing any landscape-scale conservation or stewardship objectives. Yet, traditional program offerings are out of step, both with the needs and preferences of landowners and with current ecological challenges and resource constraints. We hope that this guide will equip you to put landowners at the heart of your outreach efforts, and to use social marketing tools and ideas to inspire more landowners to take actions that will have a meaningful impact on the landscape. Moreover, we hope that the evaluation techniques described in this guide will help you track your progress, address gaps and bottlenecks, and yield learning that will enrich future outreach efforts.

We wish you luck in your work and invite you to be a part of the growing cohort of natural resource professionals who are committed to finding better ways to engage landowners in conservation and stewardship. Please reach out to us at info@engaginglandowners.org with questions, ideas, or just to chat. And visit engaginglandowners.org to find more resources and join our community of change-makers.

TOOLS FOR ENGAGING LANDOWNERS EFFECTIVELY

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