

Land Trust Accreditation Impact Evaluation

Appendix D: Accredited Land Trust Survey

April 20, 2018

Overview of Document

- Summary
- Responses
 - Broader impact of the accreditation program
 - Specific impacts on respondent organization
 - Confounding responses
- Appendix: Respondent profile

Summary

Purpose and Approach

To complement an extensive data analysis of changes in accredited land trusts over the decade between 2005 and 2015, ALTs were administered an extensive survey on the impacts of accreditation

While the data showed quantitative changes associated with the period of the accreditation program, the survey was intended to go deeper by obtaining land trust perspectives on “causation,” that is, the role becoming accredited played in the changes their organization made over the last 10 years

Land trusts were asked also for their perspective on the impact of the accreditation program on conservation more broadly

The survey ran between March 13th and March 23rd, with later responses accepted for another week beyond this date. No responses were received after March 26th

In total, 259 accredited land trusts responded to the survey, a response rate of approximately 70%

Key Results

Broader impacts

Overwhelming majorities of respondents saw broad, positive impacts on the field, including:

- 87% say accred motivated their orgs to make the changes they made in the last 10 years

- 85% say accred improved LT community's ability to meet the promise of perpetuity

- 79% say accred helped increase stakeholder confidence in the LT community

- Most (70%) felt their efforts to become accredited contributed to the broad effect on stakeholder confidence

- Most (86%) promote their accred status

Impacts on respondent organization

When looking harder at their orgs, respondents indicated more mixed, though still solid, impacts, including:

- 66% saw mod/subst contribution to improvements in key org functions

- 50%-68% saw contributions to a range of acq procedures and stew systems

- 80% said funders were somewhat to very familiar with accred; funders factoring accred in via preferences rather than requirements

- About half saw benefits for their funding applications

- Only 42% saw mod/subst impacts on the confidence of their stakeholders in their org

Discussion

Most accredited land trusts seem to believe accreditation has had broad and positive impacts on conservation. They are proud of their org's contribution to this impact, and widely promote their accred status. These are happy take-aways from this survey

And yet, as indicated in the responses, accreditation is no elixir for org capacity and development

To think so would be to foolishly underestimate the difficulty of achieving organizational excellence in general, and the enormous role the development, adoption, and implementation of Standards and Practices by land trusts has played over many years

It is likely for this reason that more land trusts saw field-wide benefits from accred than saw overwhelming contributions to the specific changes their orgs made over the last decade

To be sure, for many respondents, the path to accreditation produced dramatic improvement in their organization

But for more, the contribution of accred has to be taken in the context of prior impacts of S&P, and ongoing efforts to implement them

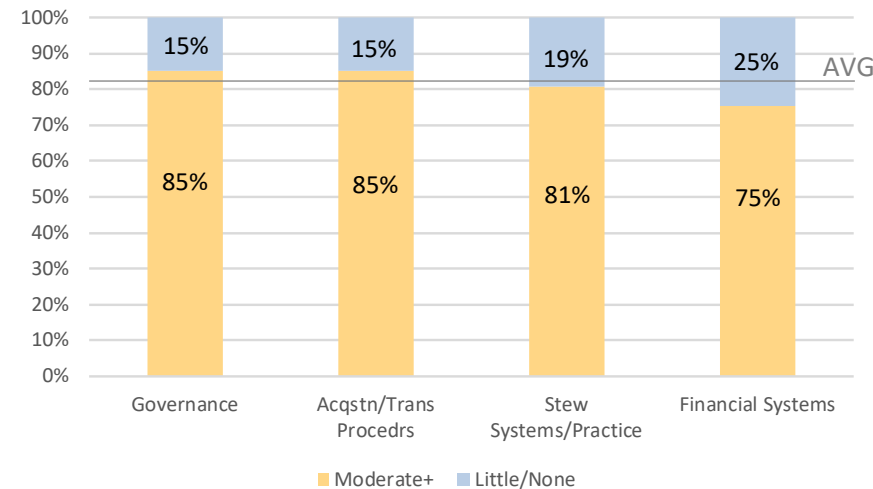
Broader Impact of the Accreditation Program

Overall Organizational Improvement, Last 10 Years

Change Over Last Decade

On average, 82% of respondents said their organization had made moderate-to-substantial improvements in their major organizational functions over the last 10 years

Extent of Improvement in Key Organizational Functions, Last 10 Years

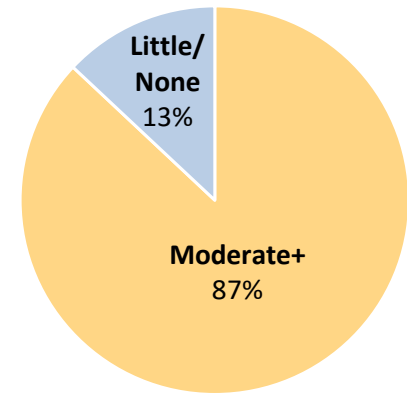


Overall Contribution of Accreditation

General Contribution of Accreditation

87% of respondents – nearly 9 in 10 – said that becoming accredited provided moderate or stronger motivation to make organizational improvements

Degree to Which Becoming Accredited Motivated Organizational Improvement

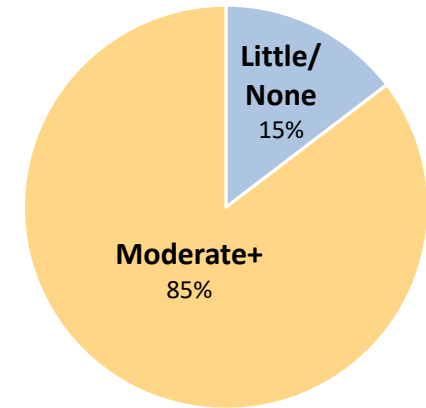


Perpetuity

Stronger Promise of Perpetuity

85% of respondents said they thought that the accreditation program had moderately or substantially improved the land trust community's ability to meet the promise of perpetuity

Degree Accreditation Program has Strengthened Promise of Perpetuity

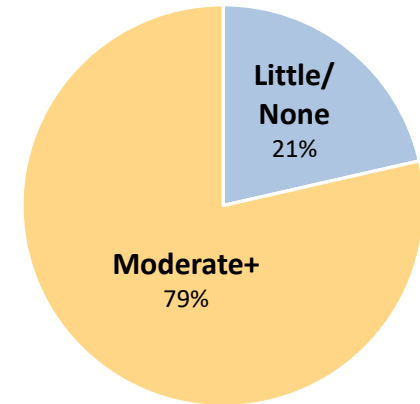


Stakeholder Confidence

In the Conservation Field

Looking outward, nearly four in five respondents (79%) said the accreditation program had moderately or substantially helped increase stakeholder confidence in the land trust community as a whole

Extent Accred Program Increased Stakeholder Confidence In Land Trust Community

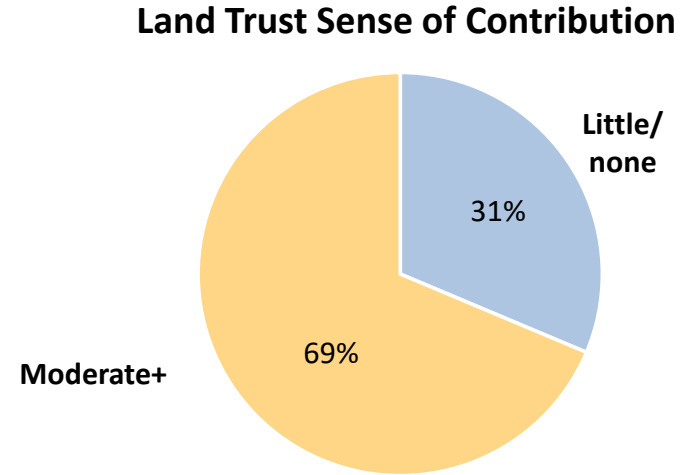


Respondent Org's Contribution to the Field

Land Trust Sense of its Contribution to Stakeholder Confidence

A large majority of respondents felt their individual action had played a role in a broader impact on the field

Nearly 70% said they thought that their organization's being part of the accreditation program contributed moderately or substantially to increased public/stakeholder confidence in land trusts and land conservation generally



Promoting Status as Accredited Land Trust

Extent of Promotion

Promotion of their accreditation status is widespread among accredited land trusts. 86% of respondents said they promote their accreditation status moderately or extensively, with 41% doing so extensively

This would seem to suggest a widely held sense by conservation organizations that their status as an accredited land trust has some value with their stakeholders

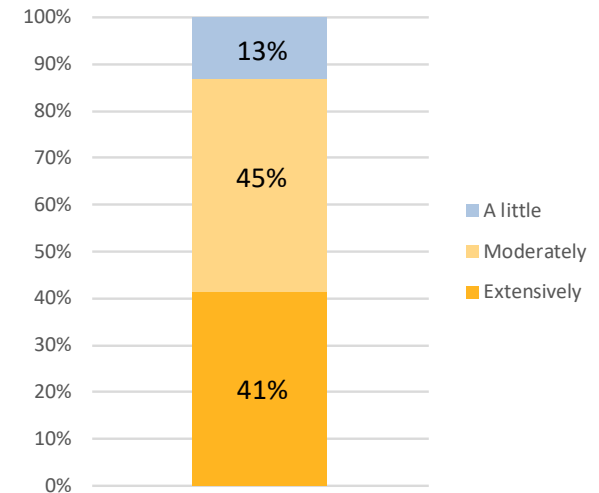
How Promoted

90%+ of respondents promote their status as an accredited land trust broadly, through their website, print materials, to members, and to the public generally

70% to 83% of respondents promote their status as an accredited land trust to funders and partners

Only about half of respondents promote their status as an accredited land trust to the media

Extent to Which Respondent Org Promotes Status as Accred Land Trust*



How Accredited Status is Promoted

How promoted	% Resp
Website	95%
Print materials	93%
Members	91%
Public generally	89%
Foundation funders	83%
Gov't funders/ptnrs	81%
Major donors	80%
Nonprofit partners	74%
Gen'l fin supporters	73%
Fundraising solicitations	69%
News organizations	55%
Local news story	49%

*Note: Does not total 100% due to rounding and that the one respondent organization that did not promote their status was not included in this figure

Source: Accredited Land Trust Survey, 2018; Consultant analysis

More Specific Impacts on the Respondent's Organization

Contribution to Organizational Functions

Contribution by Function

In response to more detailed questions about specific functional areas, on average, two-thirds of respondents (66%) said that becoming accredited had made a moderate or stronger contribution to improvements

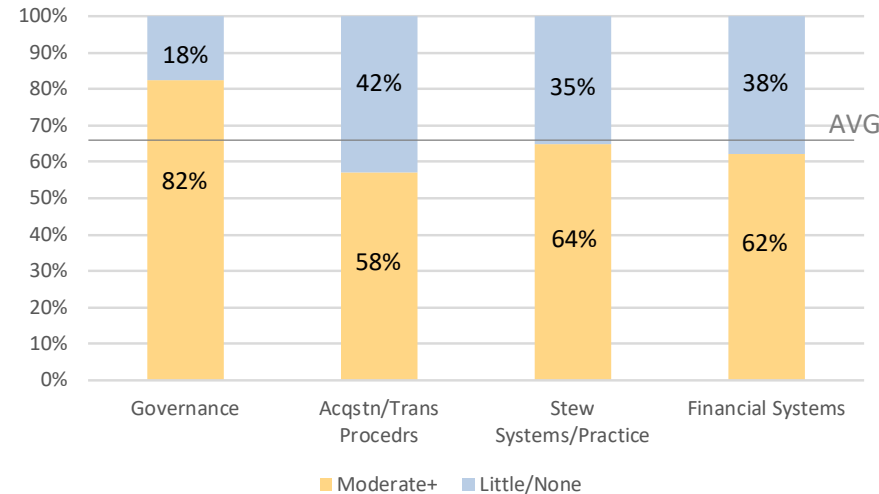
According to respondents, becoming accredited made the greatest contribution to governance. Four in five respondents said it had contributed moderately or stronger to improvements in this function

For the other areas, roughly 60% of respondents said becoming accredited contributed moderately or more, while around 40% said it had made little or no contribution

The average by function is lower than the broader response that participants offered (recall that 87% said accreditation had helped motivate them to make change). It may be that respondents believe there was less impact the more they reflected on specifics about their organizations

Or it may be that respondents drew a distinction between “motivation” to make change and actual contribution to change

Extent Becoming Accredited Contributed to Improvement in Key Organizational Functions



Notes: For contribution of accreditation, 1) Figures for Acquisition/Transaction Procedures are an average of detailed questions (see slide X); 2) Figures for Stewardship Systems/Practice taken from question that had N/A as an option. In this case N/A = 1% and is not included here
Source: Accredited Land Trust Survey, 2018; Consultant analysis

Contribution to Acquisition and Stewardship

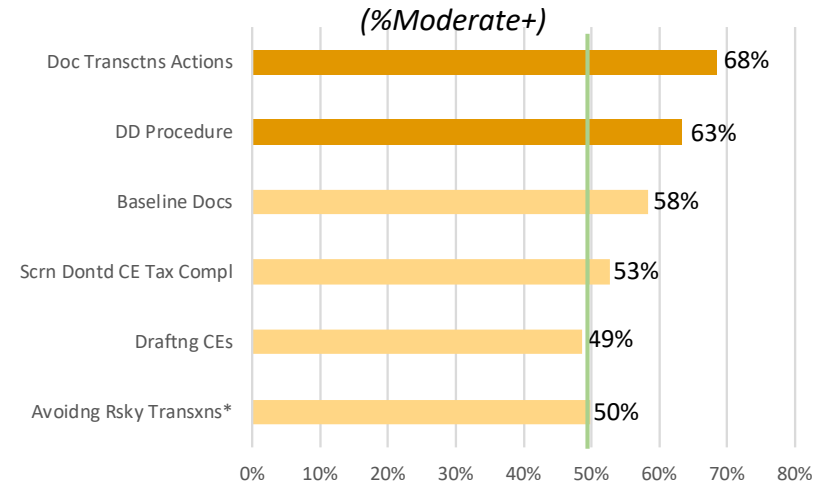
Acquisition Procedures

A majority of respondents felt that becoming accredited had contributed at least moderately to improvements in:

- Documenting transaction actions
- Due diligence procedure
- Baseline documents
- Screening donated CEs for tax compliance
- Avoiding risky transactions

With the strongest impacts on due diligence procedures and documenting transaction actions

Extent Becoming Accredited Contributed to Improvements in Acquisition Procedures



Stewardship Systems

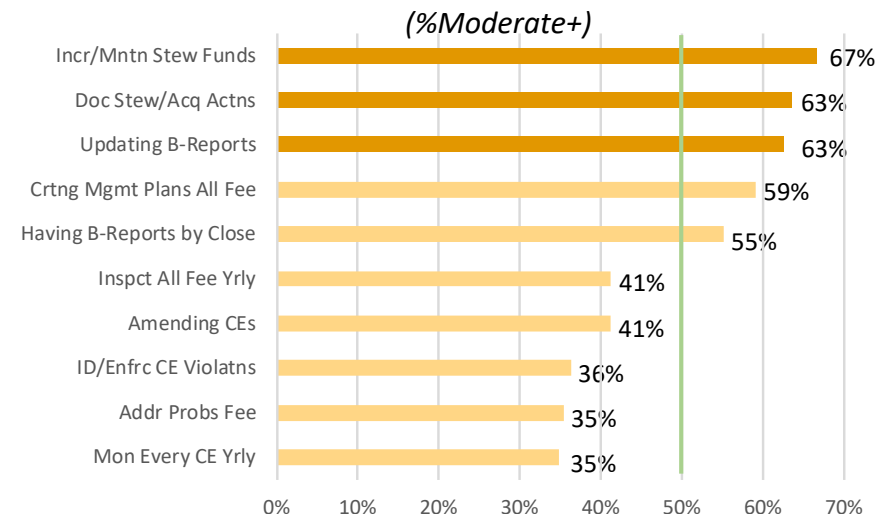
A majority of respondents felt that becoming accredited had contributed at least moderately to improvements in:

- Increasing/Maintaining stew funds
- Documenting stew/Acq actions
- Updating baseline reports
- Creating mgmt plans for all fee properties
- Having baseline reports by closing

With the strongest impacts on stewardship funds, documenting actions, and updating baseline reports

The weakest impacts were on monitoring every CE yearly, addressing problems on fee properties, and identifying and enforcing CE violations

Extent Becoming Accredited Contributed to Improvements in Stewardship Systems



Role of Accred Seal in Acquisition

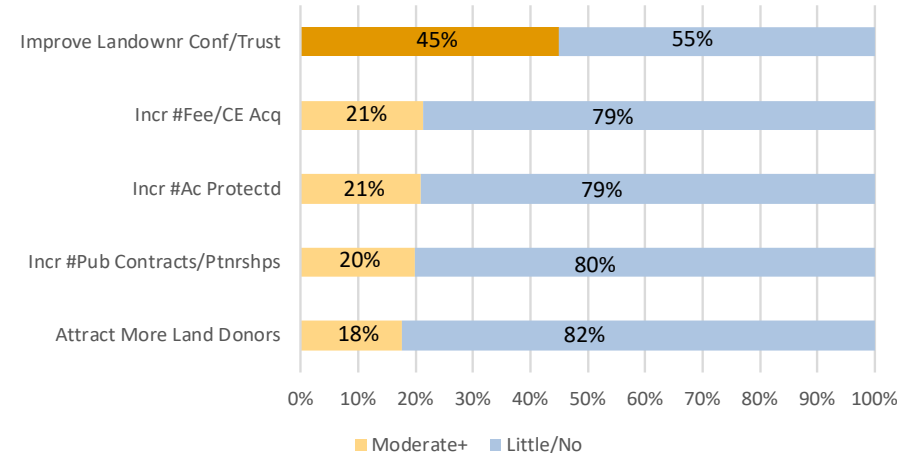
Acquisition

Respondents said that having the seal made relatively little contribution to acquisition. On average, 75% of respondents saw little or no impact on more outward facing aspects of acquisition

The exception to the overall average was landowner confidence, which was 20 percentage points above the average for moderate or greater impact

As seen in the landowner survey, this connects with the strong increase in landowner confidence that their land will be conserved permanently

Extent to Which Having the Accreditation Seal Helped Acquisition



Help With Easement and Fee Issues

Challenges, Violations, Fee Management Issues

In general, the changes made to become accredited contributed more to addressing challenges, violations, and fee management issues than to litigation (61% mod/subst v. 35% mod/subst)

60% of respondents said that their organization had experienced easement challenges or violations, or fee management issues, since becoming accredited

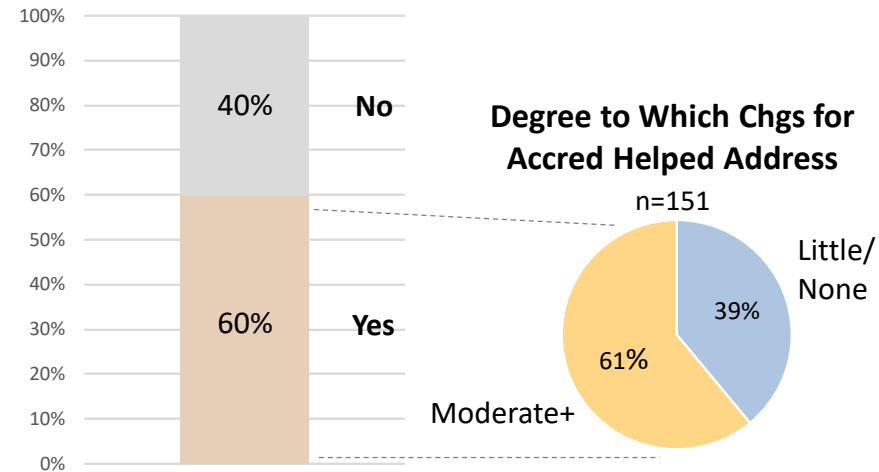
Among these respondents, 61% indicated that the changes they made to become accredited made a moderate or stronger contribution to helping them address these issues

Litigation

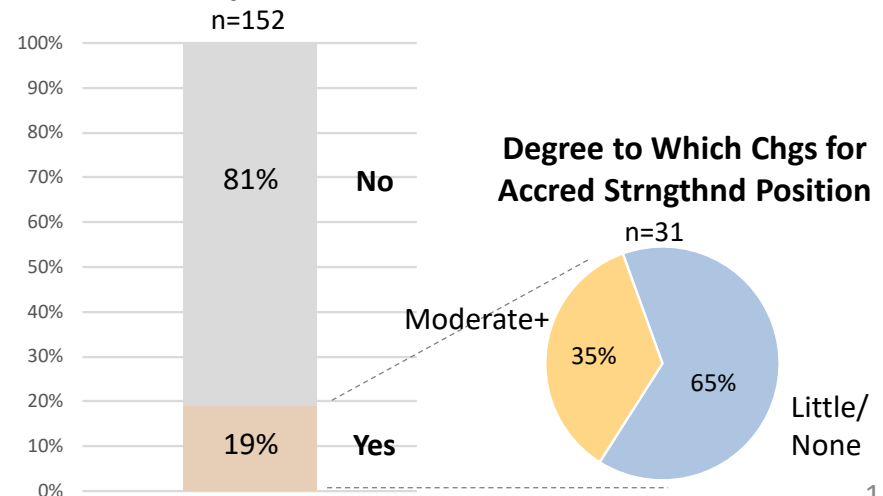
About one-fifth of respondents said they had a challenge or violation end up in court

Of these, only about one-third (35%) said that the changes they made to become accredited had moderately or substantially strengthened their position in court

Experienced Challenges, Violations, Mgmt Issues Since Accredited



Ended Up In Court?



Acquisition and Stewardship: Discussion

Further Discussion

The impact of becoming accredited on stewardship systems seems somewhat weak, especially on monitoring every CE yearly, addressing problems on fee properties, and identifying and enforcing CE violations

It is possible, however, that organizations had already made substantial changes in these systems over the years as they implemented Standards and Practices, and that becoming accredited did not lead to large change in practice

However, it is notable that for a half to two thirds of respondents, becoming accredited made a moderate to substantial contribution to improvements in many stewardship practices and acquisition procedures

Having the acquisition seal made little or no contribution to respondent protection programs, beyond a noticeable impact on landowner confidence

As noted on a previous slide, in general, the changes made to become accredited contributed more to addressing challenges, violations, and fee management issues than to strength in the courtroom (61% mod/subst v. 35% mod/subst). This is probably indicative of the fact that many more factors come into play once a conflict becomes litigious

Attracting and Transitioning-In Key Players

Attracting, Retaining, Transitioning People to the Org

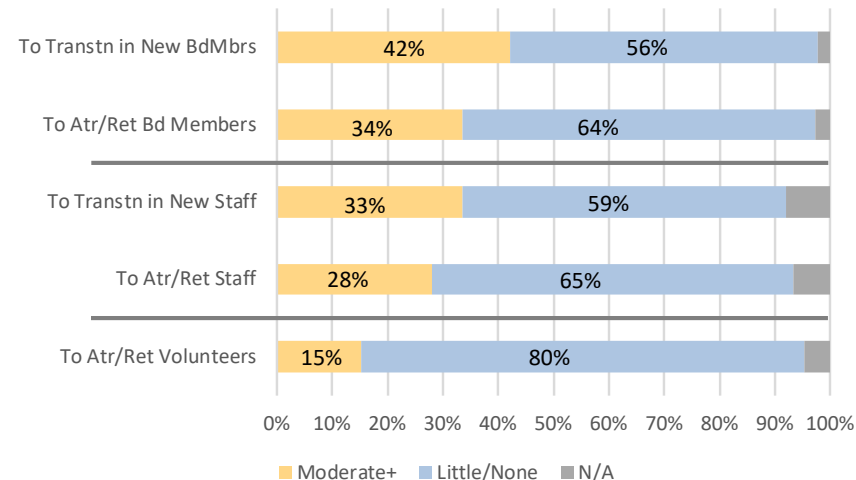
In general, a large majority of respondents indicated that the changes to become accredited had had little or no effect on attracting, retaining, or transitioning in board, staff, or volunteers

Respondents who said accreditation had a moderate or stronger effect indicated somewhat more benefit to transitioning in new board and staff than to attracting and retaining them

And they said the effects were somewhat greater in relation to the board than to staff. 42% said the changes to become accredited had helped with transitioning-in new board members

By far the smallest contribution reported by respondents was in attracting and retaining volunteers

Extent Changes to Become Accredited Helped Build Board, Staff, and Volunteers



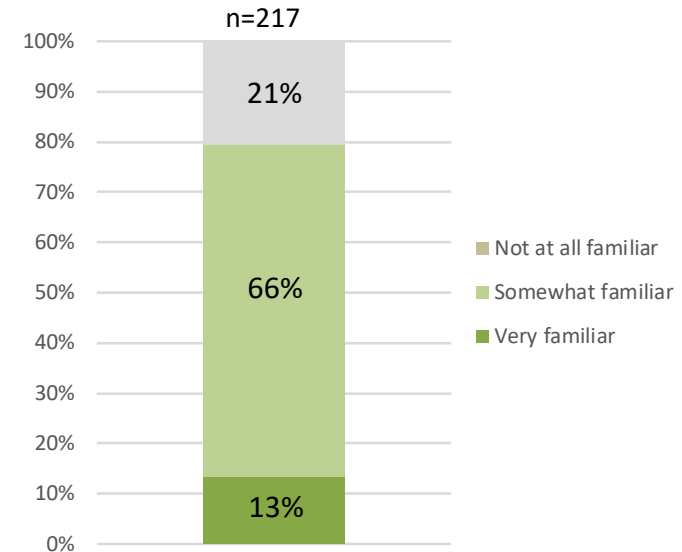
Funder Familiarity With and Use of Accreditation

Familiarity

Nearly 80% of respondents said the public agency and foundation funders that their organization deals with are somewhat or very familiar with the accreditation program

Two-thirds said funders were somewhat familiar. (Along with a range of other indicators from this evaluation, this suggests room to increase funder familiarity with the accreditation program)

Funder Familiarity With Accreditation Program

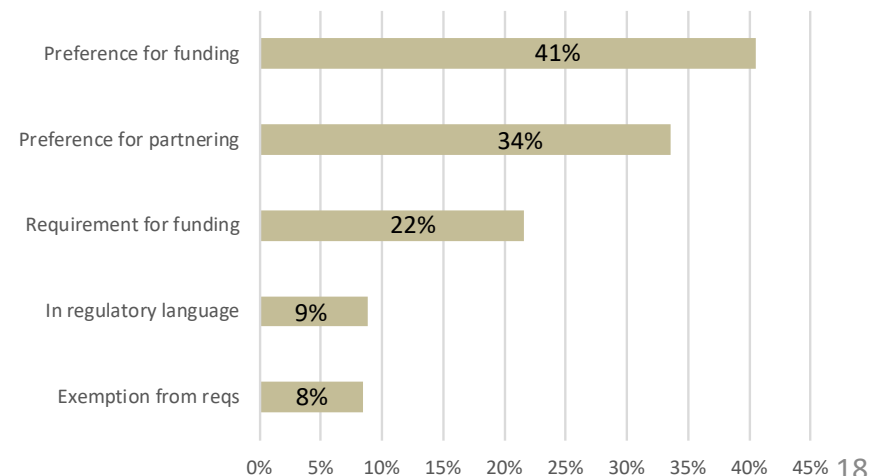


How Funders Factor-in Accreditation

Among those who indicated specific ways in which they were seeing funders factor accreditation into their decisions, the largest number (41%) said there were funding preferences for accredited land trusts, while many others (34%) said funders choose to partner with accredited land trusts

More stringent steps such as requirements and exemptions were less frequently cited

How Funders Factor-in Accreditation



Role of Accredited Seal in Fundraising

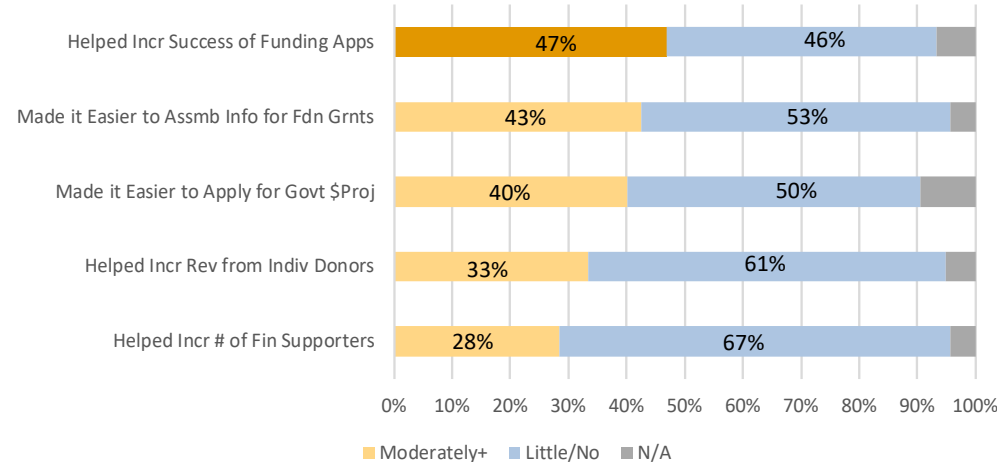
Fundraising

In general, having the accreditation seal seemed to make a modest contribution to fundraising.

Respondents said that the accreditation seal had more impact (moderate+) on grant funding (foundation, government) than on fundraising with individual donors

Nearly half of respondents said that having the accreditation seal helped increase the success of funding applications

Extent to Which Having the Accreditation Seal Helped Fundraising



Stakeholder Confidence In Respondent Land Trust

Stakeholder Confidence in the Respondent Land Trust

On average, 42% of respondents said that becoming accredited had had a moderate or stronger impact on stakeholder confidence in their land trust, while 58% said it had had little or no impact on stakeholders

This highlights a potential distinction between the positive impacts on stakeholder views of the field at large (recall that 79% of respondents said the accreditation program had moderately or substantially helped increase stakeholder confidence in the land trust community as a whole), and the views of the stakeholders of a particular land trust about that land trust – or at least a distinction that respondents are drawing

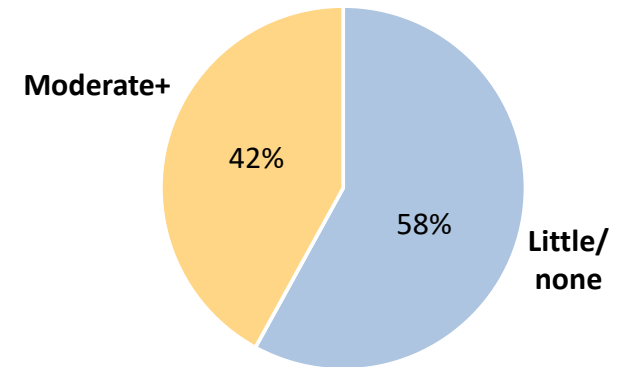
Detail by Stakeholder

In general, respondents said that the confidence of core funders and partners was most impacted by their becoming accredited (48%-58% mod/subst)

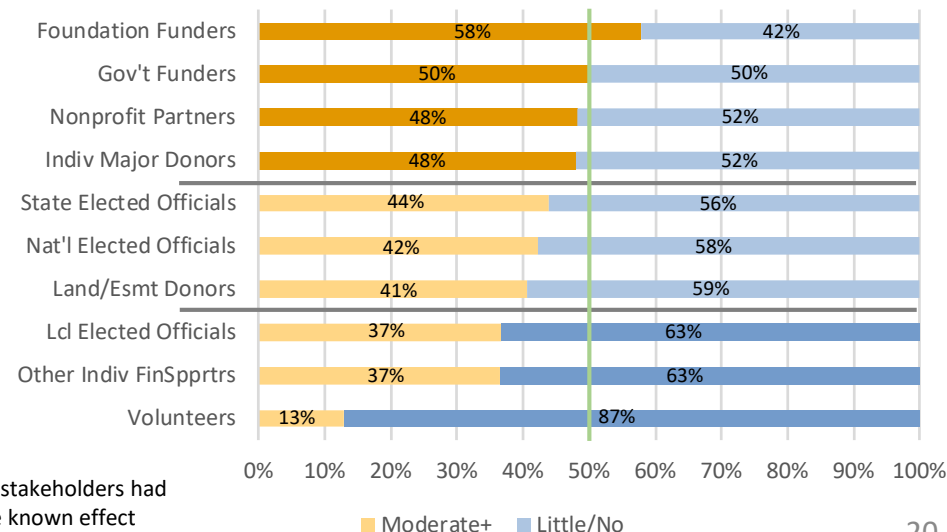
They indicated that the weakest effects were on volunteers, smaller individual supporters, and local officials

Only foundation and government funders were cited by 50% or more of respondents as having been moderately or substantially impacted

Extent Accredited Impacted Stakeholder Confidence In Respondent Land Trust



Detail by Stakeholder Group



Other Responses

On Motivations

Confounding Responses on Motivation

While 87% of respondents indicated that becoming accredited provided moderate-to-substantial motivations and contributions to the improvements their organization made, later in the survey they offered a more mixed response

About a quarter of respondents said they would have been substantially motivated to make organizational improvements without the goal of accreditation, or were certain they would have made them regardless

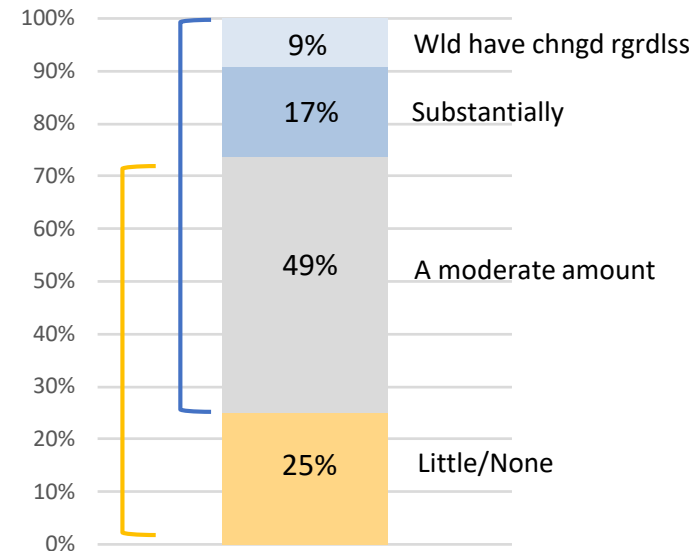
And just about half said they would have been motivated a moderate amount to make the changes anyway

Only a quarter said they would have had little or no motivation to make change without accreditation

This may simply be a reflection of the fact that S&P has had the field on a path of improvement for many years, and that most respondents believe their organizations would have continued on that path without the goal of becoming accredited/the accreditation program

It may also be a reflection of differing strength of meaning invested in the word “moderate”

Extent Org Would Have Been Motivated to Make Improvements w/o Accredited Goal



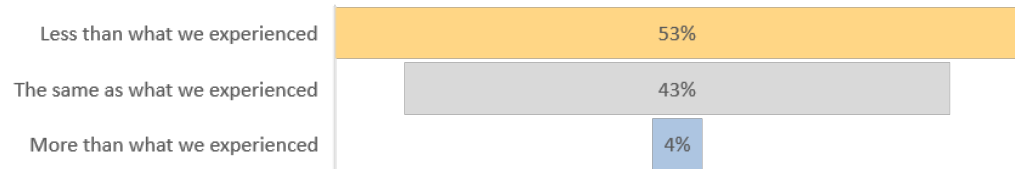
If Respondent Had Not Pursued Accreditation...

Discussion

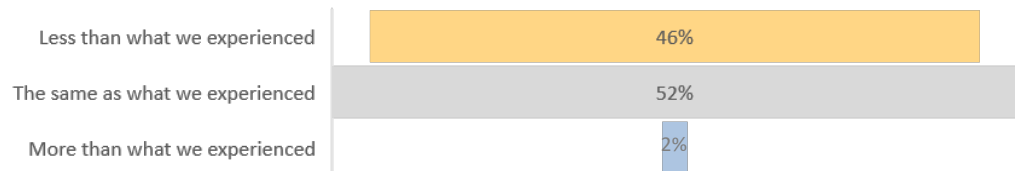
Generally speaking, almost no respondent said that their organizational sustainability, conservation impact, and ability to protect and steward land would have been greater had they not pursued accreditation

Beyond this, respondents were (very) roughly split between saying that they would have been in the same position, or they would have been in a weaker position

Their Organizational Sustainability and Conservation Impact Would Have Been...



Their Ability to Protect and Steward Land Would Have Been...



On The Assistance Received to Pursue Accredited

Views on Assistance Received

A solid majority of respondents (58%) received financial support or assistance to make the changes their organization needed to make to become accredited

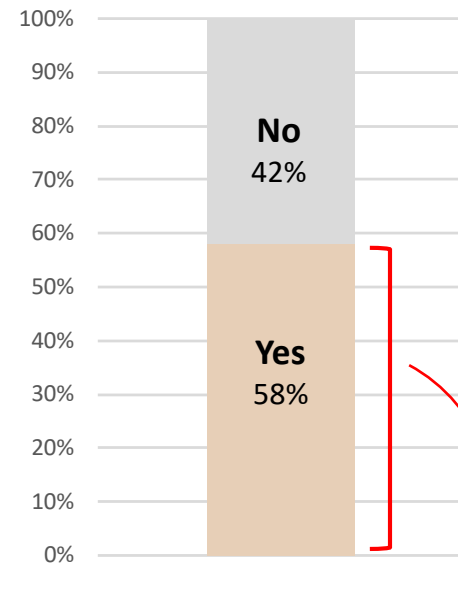
Surprisingly, approximately three-quarters of those organizations that received support/assistance said that they would have pursued accreditation even if they had not received it

As with the responses to the question of whether they would have made the organizational improvements to key systems that they made over the last decade without the goal of becoming accredited, it is unclear how much this is a kind of “spun” response, intended to play up the determination of the organization beyond what, in fact, it may have been

If taken at face value, this has implications for the status of future Land Trust Alliance fundraising and staff-time allocation as it relates to accreditation preparation, and/or its targeting

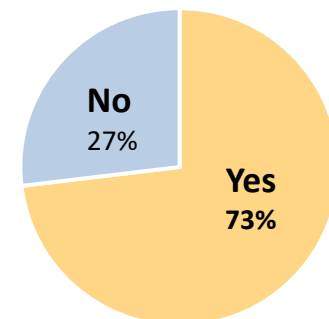
Though it is worth noting that 57% ($.42 \cdot 259 + .27 \cdot 145$) of respondents either received no assistance to become accredited or say they would have pursued it even without the assistance they received

Rec'd \$Support or Assistance to Make Changes Needed to Become Accredited



Would Have Pursued Accreditation Without This \$Support or Assistance

n=145



Appendix: Profile of Respondents

Profile of Respondents

Discussion

There are relatively few smaller organizations in the pool of respondents to the survey. As compared to the data analysis, the set of organizations in the survey is more weighted toward larger land trusts:

	ALT	Data
Size Seg	Survey	Analysis
A+B	44%	72%
C+D	56%	28%

There is a roughly even distribution across B, C, and D-size and tenure segments

Profile of Respondents to Accreditation Impact Evaluation Survey

Size Segment	Tenure Segment				Total	%Tot
	A	B	C	D		
A	2	5	9	7	23	9%
B	17	25	32	16	90	35%
C	6	31	31	11	79	31%
D	4	13	20	30	67	26%
Total	29	74	92	64	259	100%
%Tot	11%	29%	36%	25%	100%	

Note on segment definitions:

Segment	Size	Tenure
A	0	0-2
B	1-4	3-7
C	5-9	8-15
D	10+	15+

Size is defined by the number of Full-Time Equivalent staff

Tenure is defined by the number of years the respondent reported having worked or volunteered for their organization