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EVALUATION AND LEARNING

TOOLS FOR
ENGAGING LANDOWNERS
EFFECTIVELY

8 EVALUATION AND LEARNING

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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.