2

SETTING GOALS AND OBJECTIVES

TOOLS FOR ENGAGING LANDOWNERS EFFECTIVELY
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.

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.

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.
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.

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.