WATER WORDS
THAT WORK

Rural Landowner Customer Service Focus Group Report
Prepared for Land Trust Alliance
9/16/2018

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Overview

The Land Trust Alliance, the National Fish and Wildlife Foundation, Whitescarver Natural Resource Management, the Foundation for Pennsylvania Watersheds, and Water Words That Work, LLC are teaming up to bring the "Closing the Deal With Rural Landowners" training to the Chesapeake Bay.

Our goal is to develop a training course to help entry-level and mid career conservation practitioners successfully recruit and negotiate landowners' participation in practices improve water quality in the Chesapeake Bay watershed. Our method is to explore the strategies and tactics most successful conservation field staff, those who have the knack for helping private landowners come around to the idea of putting a conservation practice in place on their property.

At the outset of the project, the steering committee developed a list of 80 conservation staff working in the Chesapeake Bay watershed that they deemed to the leaders in field (pun intended) for working with rural landowners. Water Words That Work, LLC distributed an online survey and led two online focus groups during the research phase of this project.

Focus Group Methodology

In June 2018, we conducted an online focus group with of field conservation "mentors" to discuss their approach to providing a good customer service experience to landowners. Eight individuals registered to participate:

First Name	Last Name	Organization
Kyle	Dingus	VA Dept. of Forestry
Mike	Santucci	Virginia Department of Forestry
Colin	McAllister	Maryland Dept. of Agriculture
Lisa	Blazure	Clinton County Conservation District
Elizabeth	Zucker	The Nature Conservancy
Emily	Warner	Potomac Conservancy, Inc.
Alysha	Trexler	Western Pennsylvania Conservancy
Kevin	Brown	Bradford County Conservation District

Top Findings

Our Mentors develop trusting relationships by listening to landowners and putting their needs first

These are the types of questions our mentors are most likely to seek answers to when visiting a farm or family forest for the first time:

- "What are your goals for this property?"
- "What you most proud of about this property?"
- "What were you hoping to get from our visit today?"

The mentors report that demonstrating interest in the landowners' concerns helps them earn trust. This line of questioning also provides clues about what to emphasize when the conversation turns to conservation practices that might appeal to the landowner.

The mentors advise us that this process takes time:

- "It may take several visits to the farm to build trust."
- " [I try to] Let them know that I'm working for them and I want to use my knowledge about the resource to make it work for them to accomplish their goals."
- "... until they trust you, you will not be able to make recommendations that they will listen to anyway."

Our mentors strive to integrate themselves into the community

Our mentors see the value in organizing formal workshops and educational events for farmers and other landowners. They also understand that they might develop relationships by striking up a casual conversations at a high school football game, civic association meetings, or a local restaurants.

These unscripted conversations around town may result in an invitation to visit the landowner's property, and the mentors meticulously plan these visits, reporting:

- "[Before the meeting,] I ensure I'm up to date on conservation topics or concerns in that area and ensure that I can address them to potential clients… Afterwards, I ensure that I follow up on anything I said I would and think about ways I could better network in the future."

- Review talking points, content, pertinent facts, etc. Make sure I have command of the facts, knowledge of the event, audience, etc. Try to know who other speakers and their topics are to build off them. Have something to "hand" folks. Follow up, always, as appropriate.

- If it's meeting or workshop, I may brush up on whatever the topic of discussion will be so I'm more confident/knowledgeable in talking points or conversations that may occur during the event. I may reach out an personally invite certain people to attend the workshop/event with me. If you have a conversation and make a commitment to follow-up on something it's very important to keep your word and follow-up afterwards.

- “[Before the Meeting, I] think about my audience & ideal outcomes for the event. Refresh my memory on the topics most likely to arise. [After the meeting] I follow-up soon after with anyone who asked something of me. Also, jot down notes about the people I met; their concerns, interests, & questions (to inform my future networking/outreach work; and any follow-up action I may want to take.”
- “Before a site visit I will print out an aerial map of the site. I will have a blank map and one with some possible BMP ideas. Plus have measured acres. Also bring a tape measure to show a distance rather than just talk about the number. After I will make a new map showing the ideas and sizes of areas.”

The mentors all manage their workload differently — but they are diligent about it

The longer a conservation field staff person works in a community, the more relationships they develop and the more balls they will have to keep in the air. The mentors in this focus group were most likely to rely on electronic calendars and paper to-do lists to keep track of all this, but reported using a range of other scheduling and task managing techniques, as well.

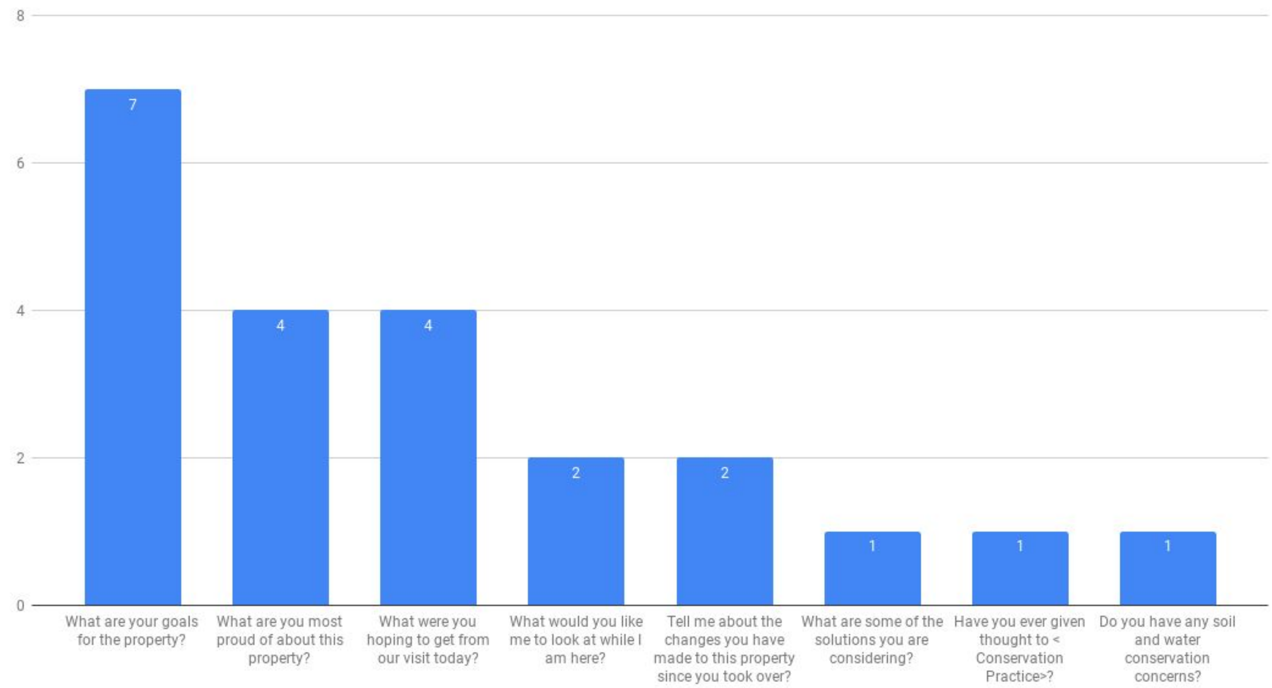
What the mentors had in common, however, was that *each had developed some sort of regular routine for reviewing their workload* on a periodic basis so they can stay on top of it. Here are a few quotes:

- “Every day I look at my weekly calendar along with my daily to do and then plan out what can I get done and if I can't then where can I put that in my calendar for future weeks. Establishing discipline is critical to keeping up on projects and their priorities given you time on the job.”
- “I look ahead to what it due when and what is time sensitive and work out from these items.”
- “Outlook calendar also helps me block off time to do my most important work (so I'm not perpetually distracted by email, etc.), as well as schedule appointments. I often put reminders for appointments in my personal calendar/phone, too.”

Focus Group Questions

Topic #1: Cultivating Relationships

Question #1: Which three of these questions are you most likely to ask when on your first appointment with a rural landowner?



Question #2: In your own words, how do you help rural landowners get comfortable sharing their concerns with you so you can offer solutions?

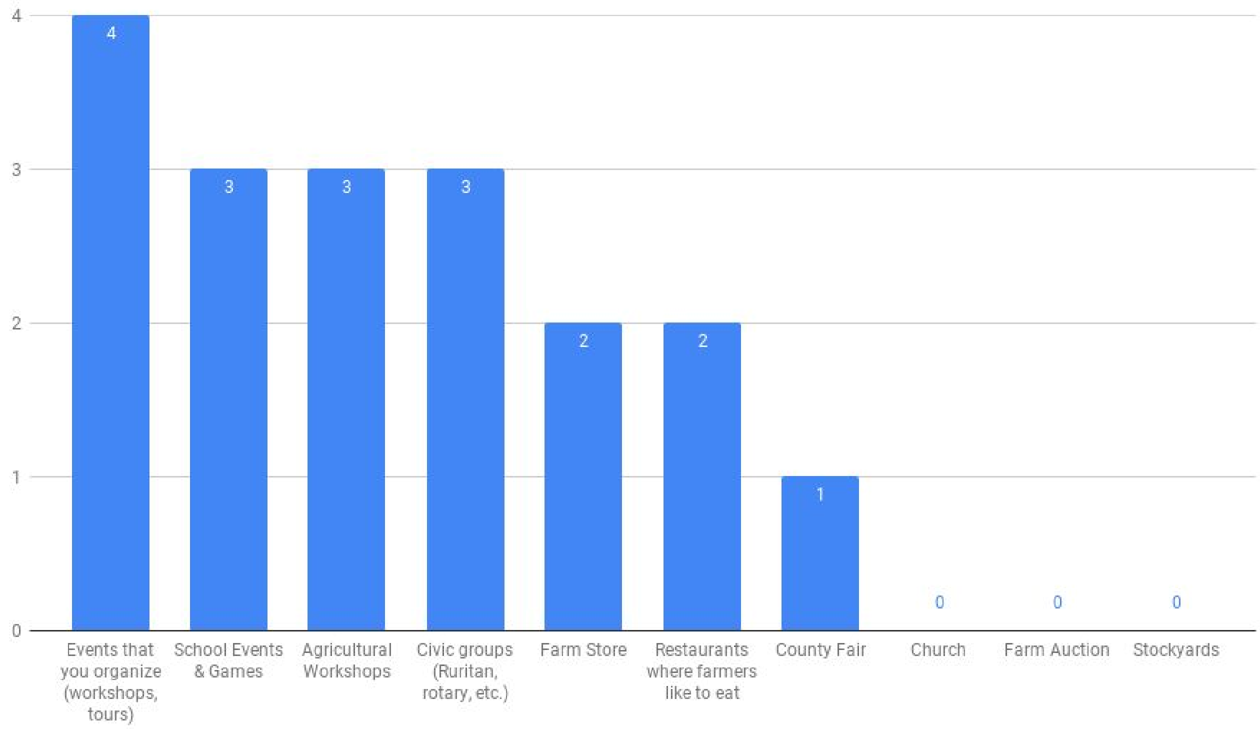
Here are their verbatim answers to this question:

- First off, it is all about them. period. it is not about what we know or what we can provide. second, it is about trust. until they trust you, you will not be able to make recommendations that they will listen to anyway
- Let them know that I'm working for them and I want to use my knowledge about the resource to make it work for them to accomplish their goals. They need to know I'm listening to them and on the same page with what they are interested in and comfortable with. Also, I want to let them know I'm not pushing them to do anything just share my expertise so they can make an informed decision on their own.
- Generally, I try to ask open-ended questions about their property, their experience, aspirations, etc. Just try to get them talking. I look for shared experiences.

- Honestly, most landowners and farmers ask for my assistance with regulatory issues and permitting problems. I complete an assessment and give them direction on the best path for compliance
- It may take several visits to the farm to build trust. It's important not to come across as judgemental to their management choices but also be willing to bring to their attention what may be viewed as resource concerns on the farm and talk about solutions.
- I talk to them about what I have done on my farm. The things that worked and the things that didn't. I let them ask personal questions about my farm and my choices. I offer them a chance to come and see things at my place or I tell them where they could see a BMP I don't have. I have pictures to show them too.
- Walk the land with them, ask about history of property and family and get to know them a little personally and then talk about options for meeting goals for their property via conservation easements.
- First, build rapport/trust in the relationship by showing you are "on the same team" with the landowner. Show interest (pay attention, ask questions); acknowledge that some problems are hard to fix (wider riparian buffer can mean less pasture); acknowledge/sympathize with landowner's concerns; etc. Complimenting a view, practice, etc, can help, too, provided the compliment is genuine and spontaneous (not forced).

Topic #2: Networking

Question #3: In your opinion, which THREE of these are the best places to rub shoulders with rural landowners?



Question #4: In your own words, what do you do to prepare for networking opportunities? And what do you do afterwards?

Here are their verbatim answers to this question:

- I ensure I'm up to date on conservation topics or concerns in that area and ensure that I can address them to potential clients. Additionally, I make sure I'm relaxed and excited to meet new people and represent my agency and its services positively. Afterwards, I ensure that I follow up on anything I said I would and think about ways I could better network in the future.

- Review talking points, content, pertinent facts, etc. Make sure I have command of the facts, knowledge of the event, audience, etc. Try to know who other speakers and their topics are to build off them. Have something to "hand" folks. Follow up, always, as appropriate.

- I'm like Trump (can I say that?), I don't really prepare a lot. I think you go where the conversation leads you. Yes, you know where you want to end game to come out, but I don't go in with a specific agenda. Maybe you should to be super successful, but you can also end up being "that guy" that no one wants to talk to because it is always the same thing, Afterwards, critique what happened and what you need to do better. Post-call debrief

- If it's meeting or workshop, I may brush up on whatever the topic of discussion will be so I'm more confident/knowledgeable in talking points or conversations that may occur during the event. I may reach out an personally invite certain people to attend the workshop/event with me. If you have a conversation and make a commitment to follow-up on something it's very important to keep your word and follow-up afterwards.

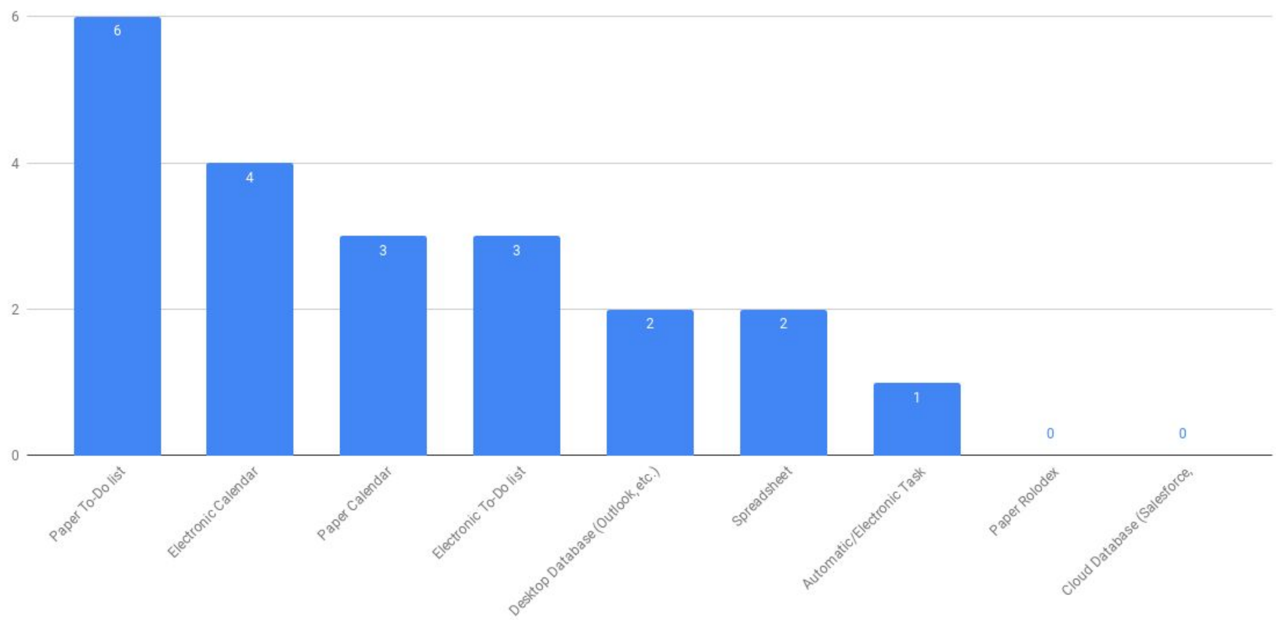
- Before: Think about my audience & ideal outcomes for the event. Refresh my memory on the topics most likely to arise. After: Most importantly, follow-up soon after with anyone who asked something of me. Also, jot down notes about the people I met; their concerns, interests, & questions (to inform my future networking/outreach work; and any follow-up action I may want to take.

- Before a site visit I will print out an aerial map of the site. I will have a blank map and one with some possible BMP ideas. Plus have measured acres. Also bring a tape measure to show a distance rater than just talk about the number. After I will make a new map showing the ideas and sizes of areas.

- Talk to landowners I already know in the area who can give me background on new contacts. Look at aerial maps of the property or area, have written materials handy, if appropriate to use. Afterwards, if it feels appropriate I write a note or call a landowner that may have expressed interest in an easement if they don't call me first. But I try not to be pushy!

Topic #3: Managing the Workload

Question #5: In your opinion, which three of these TOOLS are most helpful in keeping track of your workload (contact information, appointments, and to-dos)?



Question #6: In your own words, how do you keep track of your workload (contacts, appointments, to-dos)?

Here are their verbatim answers to this question:

- notes and calendars everywhere. the one book suggestion sounds good to me. This is where I fail the most probably, or at least get behind on, and then I end up doing what HAS to be done right then. I have no choice. it is a deadline and needs to be done now. fortunately I have not gotten behind to the point of being in trouble

- Record priorities and tasks both in a written to do that is very specific and an electronic to do that is very broad. Every day I look at my weekly calendar along with my daily to do and then plan out what can I get done and if I can't then where can I put that in my calendar for future weeks. Establishing discipline is critical to keeping up on projects and their priorities given you time on the job.

- I have two calendars and a weekly to-do list. I look ahead to what it due when and what is time sensitive and work out from these items. I also plan around the weather and seasons. A rainy day makes for a good day to make phone calls, etc.

- I initially start with a journal - track important discussions, information, to-do's, etc. in there. I transfer to-do's to a paper list, although I am starting to track that on an e-calendar as appointments. Appointments/invites on an e-calendar with reminders. Create a landowner file to track contact and property info. Robust filing system with email.

- I'm old fashioned and still prefer paper calendars and to-do lists. I also have a white board on my wall to keep track of tasks. It's important to acknowledge the need for flexibility, because sometimes you have a workload plan for the day and then you get pulled into something else that distracts you from the original to-do list.
- paper list, regular communication with partners working on projects with me, written list for partners (usually funding requests), phone contact list,
- make sure my boss knows what i am doing for performance review
- I (try) to keep detailed to-do lists for each project (and record of what has been completed when), as well as a to-do list for the near future that contains immediate tasks from my other lists. It feels crazy, but it works.
- Outlook calendar also helps me block off time to do my most important work (so I'm not perpetually distracted by email, etc.), as well as schedule appointments. I often put reminders for appointments in my personal calendar/phone, too.
- Contacts are kept in a database & in individual project files.