



The Leading Edge

STEWARDSHIP & CONSERVATION IN CANADA 2003

**Commissioned Research**

# **Successful Stewardship and Conservation Organizations – Case Studies and Best Practices**

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# What makes a Successful Stewardship and Conservation Organization?

*Prepared by Heather Millar for the Land Trust Alliance of BC, June 2003*

## Executive Summary

This report presents the findings of a qualitative research project conducted by the Land Trust Alliance of BC during May – June 2003. The report addresses the question “what makes a successful stewardship and conservation organization” by establishing key indicators of success and identifying corresponding best practices exemplified by six Canadian non-profit stewardship and conservation organizations. The research aims to assist organizations in identifying their own best practices, thus enabling them in achieving their goals in an increasingly competitive environment. This report also includes a simple benchmarking tool to enable stewardship and conservation non-profits to evaluate and reflect on their current practices.

## Key Findings

The results of the research confirmed the following six key indicators of success:

- 1) *Vision and Values* – successful organizations have a clear vision, mission, and goals that are reflected in the organizations’ activities and values.
- 2) *Community Engagement* – successful organizations understand the needs of their communities and adapt their conservation priorities accordingly
- 3) *Sustainability* – successful organizations demonstrate long-lasting impact by soliciting funds from a variety of sources.
- 4) *Partnership-Building* – successful organizations value and nurture collaboration with a variety of partners.
- 5) *Leadership and Commitment* – successful organizations have diverse boards and effectively recruit and retain both staff and volunteers.
- 6) *Risk Management and Evaluation* – successful organizations are able to demonstrate measurable outcomes to their constituents and are able to identify and deal with risk in a strategic way.

Two other indicators of success arising from the research are:

- *Technology* – successful organizations adapt new technologies to develop systems that support and reflect their mandate;
- *Diversity* – stewardship and conservation organizations are uniquely positioned to appeal to a broad cross-section of constituents while at the same time maintaining a local focus.

Barriers identified in the research support the earlier findings of national studies that identify lack of financial resources, lack of public awareness, inability to retain staff & volunteers and the need for increased networking between groups as key areas of concern in the Canadian stewardship and conservation movement.

## Introduction

In recent years, the number of stewardship and conservation organizations in Canada has increased substantially.<sup>1</sup> As the number of such organizations has grown, so has the level of competition between organizations to secure funds, contact landowners, and develop key partnerships. In this climate, organizational success is especially crucial to ensure long-term, substantive stewardship and conservation. This research project examines what makes a successful stewardship and conservation non-profit organization in Canada.”

This paper contributes to the discussion of successful practices by applying a methodology of benchmarking to the concept of success within a stewardship and conservation framework. In doing so, this research bridges a gap between quantitative studies that have identified current practices and barriers in the stewardship and conservation movement in Canada (Evergreen, 2002) and more generalized studies that address organizational capacity and success in the non-profit sector. This research is being done simultaneously with larger national research pieces such as Dovetail Consulting’s project identifying the value of stewardship and conservation (forthcoming, 2003) and Melissa Watkins’ research on the land management capacities of Canadian land trusts (forthcoming, 2003).

Benchmarking best practices is a way of measuring quality in processes and practices. Models such as the Drucker Criteria of Innovation (Drucker, 2003) and the Capacity Framework (McKinsey, 2001) identify specific principles, or indicators, which can then be used to identify and evaluate successful practices and strategies undertaken by non-profit organizations. This study consolidates some of the above approaches with *Standards and Practices* specific to the conservation movement (LTABC 1999) so that the approaches can be applied by stewardship and conservation organizations to identify their own best practices and strategies.

## Methodology

This study involved a literature review of current capacity measurement tools, organizational development, and stewardship and conservation standards and practices. The researcher then consulted with five key “experts” in the stewardship and conservation field to develop definitions for the project and six key indicators of success. Based on the project definitions, the researcher then solicited nominations of “successful” stewardship and conservation organizations from a variety of non-profit, academic, and government professionals within the field. This process was not initiated to identify quantitatively the “most successful” organizations in Canada, but rather to identify six organizations that are highly regarded by stewardship and conservation professionals for their practices. Telephone interviews with project participants followed, using interview questions based on the key indicators of success. Responses were analysed for common practices and themes and compared to the indicators of success from the literature review.

## Defining Success: Identifying Key Indicators and Project Definitions.

As the conservation movement, and by extension, the number of stewardship & conservation organizations, increases in Canada, there is a growing need for sector-specific resources aimed at strengthening organizational practices in the long-term. Over the past few years, US-based organizations such as the Land Trust Alliance, Training Resources for the Environmental Community ([www.trecnw.org](http://www.trecnw.org)), and the Institute for Conservation Leadership have worked to develop a variety of organizational resources focusing on leadership and performance, board development and volunteer recruitment and management (Bonar, 2001; Jones, 2001; Smiley 2000). In Canada, the Land Trust

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<sup>1</sup> There are currently some 180 land trusts active across the country (Evergreen, 2002).

Alliance of BC has developed guidelines for operations of land trusts, outlining 15 key standards for “responsible operation of a land trust, which is run legally, ethically, and in the public interest, which conducts a sound program of land transactions and stewardship” (LTABC, 1999)

While these resources outline specific practices such as enhancing board recruitment, streamlining committee structures, and developing effective internal policies, studies such as the McKinsey report (2001) place these practices within the context of a “Capacity Framework.” This framework outlines seven measures of organizational capacity in an interrelated pyramid structure:

- At the top of the pyramid are “aspirations”, a measure of the organization’s visioning process and development of its mission and goals.
- Supporting aspirations is the measure of “strategy,” the organization’s strategic actions in achieving its goals.
- Also supporting aspiration is the measure of “organizational skills”, an organization’s capacity to plan, execute, and evaluate programs effectively.
- These three main capacities are then supported by “lower-level” capacity measures of “human resources”, “systems & infrastructure” and “organizational structure”.

Thus, while organizations often conceptualize capacity-building as directly related to the strengthening of governance structures, technical training for staff, or the implementation of new technologies, the McKinsey report suggests that the development of these practices must correlate to the development of an organization’s goals, the strategies used to achieve those goals, and its methods for evaluating performance. In this model, these capacities are interrelated and joined by the concept of an organization’s culture, in terms of both its “core values, beliefs, and behavior norms” and its performance culture.

Comparatively, within a Canadian context, the Drucker Foundation has identified six key “Criteria of Innovation” developed from reviewing the practices of over 600 Canadian nonprofits (2003). In this model, innovation can be identified through the following criteria:

1. Innovative Practices - the extent to which the organization has had to adopt new work practices, new methods and new thinking to make the program happen.
2. Organization-Wide Impact - some activities relate to a small part of the work of the organization, while others have a broader impact on all aspects of the organization's work.
3. Outcome - the impact of the program as expressed by measurable outcome measures that compare performance under previous operational methods with performance of new, more innovative methods. These measures will help improve the way the organization achieves its vision and meets the needs of those the organization serves: its employees, the funders and their partners.
4. Sustainability - refers to programs which have a strong likelihood of continuing to have an impact over time. Those that create a continuing momentum for change are more valued on this dimension than those innovative projects that are "one off", with an immediate, short term impact that is not sustainable.
5. Replicability - a key criterion for this criterion is the degree to which a program conducted in one organization could be and is likely to be transferred to another - 'replicability' indicates the degree of replication possible.

6. Partnership Building - the extent to which the program has created and strengthened alliances and partnerships between two or more organizations in the non-profit sector, or between the non-profit sector and government (Drucker, 2003).

Thus the Drucker model echoes some of the key aspects of the Capacity Framework. Similar to the focus on measuring aspirations, strategy, and organizational skills, the Drucker model stresses the importance of “new thinking” and “new practices” which are aligned with strategic program design and which can be evaluated through concrete outcomes. However, the Drucker model introduces an external component to the exploration of organizational success: successful organizations not only demonstrate a high level of internal capacity, but their success can also be measured externally through how well their practices can be adapted to other organizations as well as through the depth of their ties and working relationships with other partners.

### **Six Indicators of a Successful Stewardship and Conservation Organization:**

Drawing upon the above models, the researcher consulted with several key “experts”<sup>2</sup> to develop six indicators of success specific to the stewardship and conservation movement. While far from comprehensive, these indicators should be understood as an attempt to develop a measurement framework that reflects not only key factors in organizational capacity and development, but also key values in the stewardship and conservation field. For example, in a conservation context, sustainability indicates not only the continued presence of an organization and its programs, but also the achievement “on the ground,” namely the sustained protection of significant natural or cultural features. The following framework identifies principles of measurement by which the practices of the project respondents were analyzed. A thorough discussion of these practices will be discussed below under Project Findings.

#### **Vision & Values**

Demonstrates a clear vision, mission, and goals that are consistent with and reflected in the organization’s activities and values.

*e.g. staff can easily articulate how their daily activities are reflective of the organization’s vision & purpose; outcomes achieved by the organization are directly related to the organization’s vision & values.*

#### **Community Engagement**

Has a keen understanding of the needs of its community and adapts its approaches and programs accordingly. This awareness is reciprocated in a high level of community support, whether through financial support, demonstrated awareness and sensitivity to the vision and values of the organization, membership, or peer recognition.

*e.g. Has developed conservation method that best suits the community; has a high level of membership and community involvement at the board level.*

#### **Sustainability**

Demonstrates long-lasting impact and achievement, whether the continued presence of the organization and/or the furthering of the protection of significant natural or cultural features.

*e.g. length of time of the organization has existed or has achieved protection of a particular feature in perpetuity, demonstrates a diversity of funding from various sources.*

#### **Partnership-Building**

Supports collaboration between the organization and its constituents, landowners, members, other

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<sup>2</sup> I am indebted to the assistance of Melissa Watkins, Bill Turner, John Scull, Sheila Harrington, Stew Hilts, and Peter Mitchell for the development of these criteria and the project definitions (see below).

stewardship & conservation organizations, contractors, and the general public. Demonstrates appreciation and recognition of other stewardship & conservation efforts; values and nurtures connections with potential partners.

*e.g. has strong connections with legal experts; involved in joint ventures.*

### **Leadership and Commitment**

Has an informed, diverse board that is actively involved in the organization. Effectively recruits and retains staff and volunteers so that there is a continuity of support for the organization, including a growing pool of potential board members.

*e.g. uses dynamic methods to target youth volunteer involvement.*

### **Risk Management and Evaluation**

Identifies and deals with risk in a strategic way. Evaluates activities and structures with the organization's vision & values; is able to demonstrate measurable outcomes to its constituents and community.

*e.g. effective strategic planning; demonstrates efficiency in expenses (i.e. reasonable proportion of administrative costs to fundraising costs, to program costs.)*

### **Definition of Success**

In keeping with these indicators, the project defined "a successful stewardship & conservation organization" as follows: *an organization that demonstrates a high level of achievement proportionate to its vision and mandate. This success can be measure internally by the satisfaction of those involved as well as externally by the level of community support and public recognition.*

### **Other Project Definitions**

Beyond pinpointing the project's definition of success, the research team also limited the scope of the research through the following set of definitions.<sup>3</sup> These definitions were provided to all project participants prior to the interview in order to provide the respondents with some shared vocabulary for the project.

**Stewardship:** Individual or collective actions or commitments to manage or protect features of land, air and water directly within the care or responsibility of the steward, respecting and using natural processes.

**Conservation:** the preservation of identified natural or cultural features in perpetuity.

### **Stewardship & Conservation Organization**

A registered not-for-profit organization or group that includes stewardship, protection, or furthering the preservation of cultural or natural features as a part of its mission and or mandate.

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<sup>3</sup> In developing these definitions, it was deemed important to allow the project to encompass a variety of conservation and stewardship approaches while at the same time limiting the discussion to stewardship and conservation non-profit organizations. Thus the exploration of private/public coalitions was deliberately excluded from the research.

## **Project Findings – Identifying Best Practices**

Interviews were conducted with six stewardship and conservation organizations over a two week period. The organizations interviewed were Ducks Unlimited Canada, The Federation of Ontario Naturalists, Evergreen, The Land Conservancy of BC, The Nature Conservancy of Canada, and The Nova Scotia Nature Trust.<sup>4</sup> What follows is an analysis of the interview responses in comparison to the project definitions and the six indicators of a successful stewardship and conservation organization as identified above.

### **Defining Stewardship and Conservation**

Prior to examining their current practices, the interviewees were asked to elaborate on their own definitions of stewardship and conservation activities. Overall, interviewees tended to define stewardship in terms of the process in which people manage or protect the natural and cultural features of land, air, water, and species at risk. For some of the interviewees, stewardship activities are a sub-set of conservation – or a “tool in the conservation suite.” From this perspective, conservation can be understood more broadly as the conservation of natural resources, using a variety of tools such as restoration, conservation covenants, extension, and education. Other interviewees identified conservation as more closely tied with the protection and preservation of natural features on private and public land. Interestingly, the definitions used by the interviewees tended to reflect their organization’s focus and mandate. For example, while one of the land trusts viewed stewardship activities as the “monitoring and maintaining the land after we have preserved it,” another organization, involved more extensively in environmental education, defined stewardship activities to include programs that “teach people how to become caretakers of public land.” Thus, these findings reflect not only the broad range of activities currently undertaken by stewardship and conservation organizations in Canada, but also the impact of strong vision, mission, and goals on an organization’s practices.

### **Vision and Values**

As the McKinsey Report states:

*Aspirations [vision, mission, goals] define what an organization will do – and won't do. They help define an overall approach and set priorities for action ... According to our findings, organizations that made the greatest gains in social impact were those which tackled high-level questions of mission, vision, and goals (McKinsey, 2001).*

The findings of this research support this assertion, as all the organizations involved in the survey spoke to the need for focus, goal setting, and planning. As Acting Executive Director Doris Cameron of the Nova Scotia Nature Trust noted, “...it is important to understand what you are doing, and how you are going to go about it – to have a good, solid plan.” Cameron’s comments are echoed by Jim Faught, Executive Director of the Federation of Ontario Naturalists. He commented “one of the most important things [for the development of stewardship and conservation organizations] would be goal setting and priority setting: once you write them down, it is amazing how they come about.” Of the six interviewees, five were able to clearly articulate the organization’s vision and mission statement, while the sixth was very aware of the need to further define the vision and mission in accessible, easy to remember language.

The engagement of the staff with the organization’s vision and mission is reflected in the effective messaging displayed by several of the organizations. Evergreen uses the metaphors of “Learning Grounds” and “Common Grounds” to market its two programs of naturalization of school grounds and of

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<sup>4</sup> Please see Appendix A for organizational outlines.

community stewardship initiatives. The Nature Conservancy of Canada has distilled its focus into the tagline of “science, securement, and stewardship.” These key messages not only make it possible for staff and volunteers to understand the vision of the organization but also create an image or a brand to increase recognition in the general public.

Despite their national scale, both Ducks Unlimited and The Nature Conservancy of Canada (NCC) also stressed the importance of maintaining a strong conservation focus from which all program activities stem. As Ian Barnett notes, “One of the most important things about Ducks Unlimited’s success has been our singleness of purpose – our focus on wetland conservation, which has been a successful formula for us.” Similarly, NCC outlines its stewardship priorities in the Stewardship Blueprint, a comprehensive document that establishes the NCC’s goals, framework, principles, activities, and measures. The Conservancy has also developed a similar Blueprint for its conservation activities. These “Blueprints” are supported by both the “Stewardship Framework,” which identifies NCC’s general approach to stewardship for partners and staff, and the “Stewardship Procedures” that identify specific procedures and standards (such as sample wording for conservation easements) for NCC staff and volunteers (NCC, 2000). As John Riley, the National Director of NCC notes, “there is the notion that we are trying to express the basics: to share our principles and procedures in a clear way and to communicate through this vehicle.”

For both Ducks Unlimited and The Nature Conservancy of Canada, this clarity of purpose has resulted in the development of structures that assist the organization in identifying its stewardship and conservation priorities. Ducks Unlimited uses a “decision support system” to identify the conservation strategies it will use in 7 different eco-regions throughout the country. This system uses a combination of quantitative and qualitative approaches to target high priority wetlands and waterfowl habitat. The Nature Conservancy of Canada also uses a complex system to focus its activities within each of the “50 great places” it has currently identified as priorities through “expert consultation & science work.” John Riley, National Director of NCC, notes that this system is called “targets, goals, places, and strategies”: the organization begins by focusing on biodiversity targets, follows by establishing conservation goals through consultation with experts, identifies location (e.g. a key area of a property or landscape) and then selects successful stewardship and conservation strategies for that location. One of the outcomes of these highly structured systems for priority-setting is that the organizations are easily able to communicate their achievements to their members and to the conservation community at large. For example, the NCC has developed an online site registry that acts as an inventory and “record(s) the degree to which its sites, individually and collectively, contribute to the protection of the biological diversity of an ecoregion”(NCC, 2000).

These practices illustrate how the vision and values of successful conservation organizations are directly related to how they set their conservation priorities and how they communicate those achievements to their communities.

## **Community Engagement**

Throughout the research process, interviewees identified the importance of community engagement, specifically, their organizations’ ability to identify, respond to, and adapt to the needs of their communities.

Landowner contact programs are a main focus for land trusts, and this is evident in the success of both The Land Conservancy of BC (TLC) and the Nova Scotia Nature Trust. Over a four-year period, TLC has contacted the owners of over 10,000 acres of valley-bottom land in the East Kootenay area. This program has resulted in a large base of landowners who are interested in making stewardship commitments. Similarly, the Nova Scotia Nature Trust has on-going contact with over 700 landowners in Nova Scotia and provides community outreach through talks, presentations, and guided walks. For both



organizations, establishing effective land-owner relationships is an essential step towards the signing of conservation covenants and land acquisition.

This focus on community engagement is also evident in the importance of local involvement in the setting of conservation priorities. When questioned how The Land Conservancy of BC attracts “buy-in” or support from the community, Eileen Palmer comments:

*I would tend to look at that question from the opposite angle – for us, the community has to get us to buy into taking a project on. At least this is true on the west coast and urban areas where you have a high number of concerned citizens coming to us on various issues.*

By selecting projects based primarily on existing community needs, Palmer suggests, TLC cultivates a close relationship with its constituents, resulting in programs that have a high level of community support. TLC’s ties to the communities it works with is strengthened by the active participation of its members in setting TLC’s conservation priorities. Palmer notes that TLC cultivates an “open door policy” in which “any member can come in and talk to staff and state their case on why a piece of land should be protected”, for example. TLC’s success in involving its constituents suggests that while biodiversity targets are paramount, it is extremely important that organizations engage in conservation projects that are locally driven. As Seana Irvine, Acting Executive Director of Evergreen articulates, “[when we choose to work with groups we set the following priorities] “there must be a local group in place to lead the work and some commitment of on-going stability in place. Groups come to us needing help organizing, but our understanding is that they will be the on-going stewards for the site.” These comments resonate with the findings of the Stewardship Agenda which state that effective stewardship depends on “collaborative action, local capacity, and ownership” (2002).

The Nature Conservancy of Canada has also moved towards a more responsive structure by decentralizing its staff. John Riley identifies this decentralization as one of the key successes of the organization in recent years: NCC now has 7 fully functioning regional offices that place staff “out to where the work needs to be done.” Riley notes that this “nesting” of staff in an ecological region has been an effective strategy in terms of developing site-specific work teams that overview each site’s biodiversity targets, goals, and actions regarding access, fencing, trail developments, etc. This decentralization of operations suggests that even large national organizations remain committed to working from a strong base of community support.

This commitment to community engagement is also expressed in the multi-layered approach these stewardship and conservation organizations use in program development. As Irvine describes Evergreen’s current program strategy:

*Our program strategy is quite effective – it is an integrated approach that embraces a holistic mandate of using community naturalization work to build health and environmental awareness. This approach is not myopic – and our tactics reflect that. Our program strategy embraces resources: we publish material to educate people to give them the tools locally, we hold workshops, we provide grants and facilitation. We apply a number of different tactics, and lastly this includes policy [advocacy]. We approach from a number of angles.*

Thus not only does Evergreen develop grassroots tools such as workshops and educational resources, Evergreen also engages in advocacy work to raise public awareness. This multi-tiered approach encourages the maximum amount of community engagement, reflecting Evergreen’s mission to bring “communities and nature together for the benefit of both.”

All of the respondents demonstrated strong communications with their constituents through newsletters, emails, website development, special events, AGMs and advertising through community, local, and

national media. Interestingly, while several of the organizations referred to their strong impact on the community, such as having the ear of government, or holding a position as the most respected and trusted organization, all of the organizations noted an overall lack of public awareness with regards to the stewardship and conservation movement at large. This finding supports Evergreen's study of Urban Land Trusts (2002) that identifies "the lack of public awareness of the importance of land conservation" as one of the primary barriers to operational effectiveness in Canada.<sup>5</sup>

## Sustainability

Along with public awareness, the Evergreen survey identified "lack of financial resources as a key concern for over 50% of land trusts" (2002). Similarly, the *Volunteer Sector Stewardship in Canada Report* identifies the need for "adequate program funding and support, and ... streamlined, long term core funding for NGOs [non-profits]" as one of the main challenges facing stewardship and conservation organizations across Canada. This challenge is compounded by the role stewardship and conservation organizations play in the long-term management of lands that are held in trust. In this climate, diverse funding from a variety of sources is a strong indicator of organizational success.

Not surprisingly, several of the organizations interviewed are engaged in a range of for-profit activities to support their non-profit programs. The Land Conservancy of BC currently manages TLC Enterprises. It functions with the same board of directors as TLC but operates as a business. TLC Enterprises' main activities fall under providing goods, including gift shop wares such as greeting cards, videos, and calendars, and providing rentals and services, which include boat cruises and cabin rentals. Palmer notes that not only are these activities successful in providing diversified streams of income, but that they also meet the needs of their members: "a lot of our members are seniors, so the boat cruises allow them to see our projects from the water in a calm environment." Similarly, Evergreen is currently seeking to build upon its focus on native plant gardens by developing a fee-for-service landscape service division and a native plant nursery with a garden centre as a "revenue generating arm of the organization." Interestingly, while both of these initiatives indicate a break from traditional fundraising methods, they remain integrated within the missions of both organizations: TLC Enterprises' goods and services contribute to public awareness and appreciation of natural environments, while Evergreen's projected activities remain rooted in the greening of the urban landscape.

Alternatively, organizations such as the Nature Conservancy of Canada and the Federation of Ontario Naturalists identified the need for stewardship and conservation organizations to set up endowment funds to ensure the long-term management of acquired lands. As Riley notes, "we take corporate pride in that we are learning to anticipate long-term stewardship ... the securing of a property is not accomplished until there is security for the property in the future." NCC currently has \$3 million in its endowment fund. Similarly, The Federation of Ontario Naturalists has recently established the Foundation for Ontario Nature, a foundation with the goal of raising \$25 million in endowment funds in the next two years as a part of a ten year business strategy. Faught notes that the establishment of the Foundation has enabled the organization to bring high-level business contacts into the field. While the Federation needs to function with a diverse board in order to represent a variety of interests, the Foundation thrives under the direction of a board concentrated with individuals who "have weight in the halls of influence." Faught notes that the Foundation is already bringing in funds and enabling the further growth of the organization.

Finally, another future direction for stewardship and conservation organizations might be the development of initiatives that allow for the sharing of resources. One of the future directions for The

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<sup>5</sup> These results also resonate with the findings of the Volunteer Sector Stewardship in Canada report which states that of the "400 problems [that] were identified throughout the course of the workshop series ... a quarter of the issues dealt with the need for awareness and education programs" (Wildlife Habitat Canada 2003).

Nature Conservancy of Canada may be the development of a “conservation credit union” which would encourage the pooling of financial resources to facilitate land acquisition. These strategies indicate some of the ways in which stewardship and conservation organizations are addressing the limitations of traditional sources of funding.

## Partnership Building

The responses gathered regarding partnerships reflect the high value placed on collaboration in the stewardship and conservation field in Canada. Perhaps as a result of skills developed in community engagement initiatives such as land owner contact programs, stewardship and conservation organizations tend to facilitate strong partnerships between a diverse range of private/public institutions, levels of government and community organizations. As Ian Barnett comments,

*[Twenty years ago] Ducks Unlimited worked primarily with small partners and landowners; when we started working with other groups on broader initiatives, we have found overall that our experience has been very positive ... DU is professional, pragmatic, and focused, and I think we have a good reputation with working with landowners. And so we can build on the history of working with landowners, and this leads to situations where landowners can bring other partners in and visa versa, where we are brought into other programs.*

This commitment to partnership is evident in both informal and formal practices of the stewardship and conservation organizations studied.

Firstly, several of the organizations highlighted the informal sharing of information that occurs between land trusts and other stewardship & conservation organizations in the field. The Land Conservancy of BC participates in bi-monthly, ad-hoc meetings with three of the other major land trusts in BC to share information on acquisitions and covenants and to ensure that the organizations are not focusing their attentions on the “same donor or the same piece of land.” Similarly, Doris Cameron of the Nova Scotia Nature Trust notes that “we always share information with other land trusts in the Atlantic region; we are constantly communicating how each of us do things.”

Secondly, several of the organizations identified their work in joint ventures as their most successful achievements. Duck’s Unlimited has been highly involved in the development of the North American Waterfowl Management Plan, an international conservation program involving Canada, the United States, and Mexico that joins the efforts of conservation organizations with federal, provincial, and state governments, industry, private companies and private landowners.<sup>6</sup> This program has been successful in conserving over two million acres across North America and has become a model for future international conservation initiatives. Similarly, The Federation of Ontario Naturalist’s recent “Smart Growth” campaign, which addresses the degradation of Ontario’s woodlands due to traditional land use planning, brought together academics and urban planners from across North America to develop a major policy report. Jim Faught, Executive Director, noted that one of the results of this program is that the provincial government has recently committed to designing and protecting a natural heritage system for Southern Ontario.<sup>7</sup>

Nevertheless, the interviewees identified several barriers to partnership-building, namely the lack of time and resources needed to establish working relationships, difficulties in providing adequate recognition to

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<sup>6</sup> For more information on the NAWMP, visit [www.nawmp.ca](http://www.nawmp.ca). The Land Conservancy of BC is also involved in two other international joint ventures based on a similar model: the Pacific Coast Joint Venture and the Intermountain Joint Venture.

<sup>7</sup> This report is available online at the Federation’s website, [www.ontarionature.org](http://www.ontarionature.org)

all groups involved, and the lack of coordination between levels of government, industry, and conservation groups.

The organizations address these barriers through a variety of tactics. Evergreen uses a participatory design model that builds capacities in local groups and supports its school program by taking time to build connections with a diverse range of partners including private and public schools, nursery schools, municipalities, conservation authorities, food access groups, community health organizations, native plant groups, boards of education, native groups, arts groups, and youth groups. Irvine notes that in working with partners it is important to identify the differing aspects and functions of working relations: “I find that partnership is an overused word to describe the variety of what we do. For example, in some cases we are mainly supplying a service to a partner, such as our work with schools, but in other cases, such as with a school board, we are sharing the work and striving towards the same goal. They are much more of an engaged partner.” Irvine’s comments stress the importance of identifying common goals and clear expectations in establishing successful collaboration, as well as the need for organizations to explore the benefits of different kinds of partnerships.

The Federation of Ontario Naturalists uses a practical strategy of ensuring that all partners involved in its programs receive adequate recognition. As Faught notes: “With NCC we signed a pact [Memorandum of Agreement] that we are on a partnership for our land purchase program. This agreement is kind of like a pre-nuptial recognition agreement, that states that any communication about the program will identify the partners.” This agreement outlines details of communication, media backgrounders, and even the size of logos to be included in newsletters. Faught notes that this approach has been a useful tool in dealing with the media, where it is often easy to overlook a particular contribution of a partner while trying to communicate the campaign’s key messages. On a broader level, the Federation has also recently established a Minister’s Award for Conservationist of Distinction, an award that partners with the provincial government to identify the achievements of stewards throughout Ontario.

The commitment to partnership-building demonstrated by the interviewees reflects the high value placed on networking and collaboration within the field. According to the results of the *Volunteer Sector Stewardship in Canada Summary Report*, one quarter of the “400 problems identified during the national consultation process ... dealt with the importance of improving networking among groups and creating better linkages with all the partners and stakeholders.” Moreover, the strategies used by the interviewees to engage in partnership building also reflect three of the “guiding principles” highlighted by the *Volunteer Sector Stewardship Report*, namely that solid partnerships are “built from the grassroots up, built on existing, trusted organizations, [and display] respect for regional differences” (2002).

## **Leadership and Commitment**

While solid external partnerships enable stewardship and conservation organizations to accomplish wide-ranging achievements in terms of land acquisition, species protection, and influencing policy, successful organizations also demonstrate achievement internally through the development of their boards, staff, and volunteers.

### **Board**

As anticipated by consultants working in organizational development in the field (Bonar, 2001, Smiley 2000), the boards of the organizations interviewed were both diverse and reflected the mandates of the organization. For example, Evergreen’s board of professional planners, communications specialists, developers, lawyers and educators reflects its urban focus, while the board of the Land Conservancy of BC includes biologists, foresters, naturalists, ranchers, and agriculturalists, reflecting its land owner contact programs and initiatives with working landscapes. This high level of community representation also enables organizations to remain responsive to their constituents and to anticipate areas of program

growth. For example, TLC's board also has a few members with a strong heritage background, a focus which is reflected in TLC's protection of cultural heritage sites in addition to natural areas.

### **Staff**

When asked to identify aspects that contributed to the success of staff in their organization, many of the interviewees noted the high level of commitment and ownership common among employees. Several of the organizations stated that staff were highly involved in the decision making process, and were welcomed to share their views not only with regards to conservation priorities but also to the operations of the organization. Other key issues included open communication, flexibility of work, opportunities for creativity, a high level of responsibility, and a shared trust in the abilities of both staff and board. These comments support the findings of the McKinsey report that note that job satisfaction in the non-profit field is interconnected with the strength of the "culture" of the organization. Interviewees tended to characterize their staff as "passionate" about stewardship and conservation issues and noted that this passion translates into a strong commitment and high quality work. Other organizations spoke to the motivational effect of a strong leader in the organization. Eileen Palmer comments, "Our Executive Director is an exemplary leader. By what he accomplishes and his personality, he serves as a mentor for many in the organization; so mentoring is [one of the things that] TLC provides to staff."

These findings speak to the high level of capacity, commitment, and motivation demonstrated by staff working in the stewardship and conservation non-profit sector in Canada. Unfortunately, due to lack of resources such as core funding, stewardship and conservation organizations often find themselves facing high-turn over rates as they lose skilled staff to the public/private sector where salaries are more competitive and job security higher. As Faught comments, "we have found that there is not longevity in salary contracts and so our staff do eventually move on to government. So our foundation is working to provide more permanency [in order] to keep scientists, and planners, and fundraisers on staff."

### **Volunteers**

As noted in the Evergreen study, "difficulties in retaining and training volunteers" act as a barrier to the operational effectiveness of land trusts (2002). All of the organizations interviewed depend on volunteers to accomplish a wide range of tasks, including office & administrative tasks, program delivery, and outreach. While the diversity of tasks volunteers engage in suggests a certain capacity of stewardship and conservation organizations to integrate volunteers at multiple levels, the interviewees also stated that their most successful volunteer programs tend to be targeted. In describing the Nova Scotia Nature Trusts' current volunteer program, Doris Cameron notes, "we detail what we require from our volunteers [by] identifying the skill sets we are looking for and how they can fit into those needs. We [also] provide them with a timeline of what the job would require and what are the outcomes ... our volunteers come to us with a high level of skill."

Specific job descriptions that are integrated with the goals of the volunteer program and the mandate of the organization as a whole tend to retain volunteers for a longer period of time. For example, the Federation of Ontario Naturalist's Breeding Bird Atlas program currently involves over 1,700 volunteers who have committed to volunteering over the course of a 5-year period in order to execute a "trend-in-time analysis" to identify conservation priorities for breeding birds. The Land Conservancy of BC has also developed a targeted program of volunteer monitoring in order to manage the 80 covenants held by TLC throughout the province. Cameron notes that the Nova Scotia Nature Trust's similar volunteer program not only supports the land trusts' goals, but also meets their volunteer's individual needs. As she comments, "generally most of the monitoring is out on the land, which is where the volunteers want to be working! We try to ensure that we give them jobs that are meeting their needs."

Another effective approach used by several organizations is to integrate volunteer programs with fundraising development. Ducks Unlimited has a large fundraising volunteer program and takes pride in the high level of stewardship the organization provides for its 150,000 members and supporters.

Volunteers in British Columbia participate in an annual convention that provides in-depth training and education in fundraising and communications. Volunteers are also encouraged to take ownership by providing their feedback on and evaluation of various aspects of the fundraising program. Another successful model identified by The Land Conservancy of BC, The Nature Conservancy of Canada and The Federation of Ontario Naturalists is the “working holiday” program. This program targets travelers and visitors with an interest in conservation by enabling them to volunteer on various projects (e.g. a butterfly count) in return for a fee. Informal partnerships between Canadian organizations and international organizations such as the National Trust in the UK have also supported the marketing and further development of these programs.

## **Evaluation and Risk Management**

One of the key indicators of capacity identified by the McKinsey report is the way in which non-profits evaluate their programs and activities. Having evaluation systems in place is important, the report suggests, not only to strengthen the internal workings of the organization, but also to demonstrate achievements to potential donors. As the report comments, “Organizations that do not rigorously evaluate or measure the effectiveness of their programs have a hard time demonstrating the kinds of tangible results that inspire donors” (2001). This use of structured evaluation systems in order to monitor achievement was evident in the responses of the interviewees. The Federation of Ontario Naturalists uses a combination of quarterly and annual reviews to measure the efficiency of its programs against both organization goals and the performance of its staff. Similarly, Ducks Unlimited uses a “balance scorecard” to evaluate the success of their program strategies. Both organizations measure their activities in relation to the goals identified in their strategic plan. Any weaknesses identified during the evaluation process are then addressed in the subsequent year’s planning sessions. The formal approach of these organizations reflects the size of their operations and their age: both organizations have been operating in one form or another for over 60 years.

The connection between the ability of a stewardship and conservation organization to manage risk and its ability to attract donors was also raised. The Nature Conservancy of Canada’s most recent version of their Stewardship Manual has included the input of a risk management professional in the aims of further standardizing NCC’s policies and procedures. Riley notes that convincing the insurance field of the benefits of covering conservation organizations is a key step towards securing large, long-term contributions: “what you begin to learn is that everyone in conservation is extremely focused in their mission, focused on particular projects, and hardly anyone gives unattached money... we give foundations a chance to evaluate in actual real estate.” Riley’s comments are echoed in the responses of The Federation of Ontario Naturalists, which identify the FON’s strong business model as a key advantage in attracting “high-end” investors. Faught suggests that strong fiscal management demonstrates a level of responsibility that is attractive to investors from a variety of backgrounds.

Comparatively, the alternate model of evaluation that emerged from the interviewees was a more informal approach based on on-going, open, communication between staff, volunteers, and members. The Land Conservancy benefits from the volunteer-driven structure of the organization in that members and volunteers provide constant feedback as to the efficiency of its programs. As Palmer comments, “Our members will call us if something is not working or working well – they will let us know! Our members and volunteers have direct input into how the organization is run.” Similarly, Evergreen uses a combination of surveys, focus groups, and on-going dialogue to provide daily informal evaluation. Given the strong culture of community engagement demonstrated by both of these organizations, it is not

surprising that this more ad-hoc nature of evaluation has been successful; although respondents did indicate that they are currently exploring additional methods of evaluation as their organizations grow.<sup>8</sup>

### **Arising Factors: reconsidering the indicators of success.**

As to be expected, not all of the best practices identified during the research were easily encompassed by the “Six indicators of Success.” Upon further analysis, two other measures emerged out of the research: Technology and Diversity.

#### **Technology**

First, several of the interviewees identified their organization’s integrated use of technology as examples of successful practices. In partnership with the Land Trust Alliance of BC and other groups, The Land Conservancy of BC has assisted in the development of the “BC Lands in Trust Registry.” This registry offers detailed information about protected areas on private lands, including their ecosystems, habitats, cultural or aesthetic features, and their land uses. Palmer comments, “by tracking land owners, following ecosystems, [and] using one database to store information we can more accurately identify gaps in analysis.” Thus the use of integrated technology supports the standardization of practices, enabling organizations to set their conservation priorities more effectively.<sup>9</sup> Similarly, The Nature Conservancy of Canada’s site registry format has been adopted by other conservation groups and NCC is currently working on developing the registry as a resource that other land trusts and conservation groups can access online. Jim Faught of the Federation of Ontario Naturalists identifies the organization’s website as its main communications vehicle, noting that they hope to become the “one-stop shop” for conservation issues in Ontario. FON is currently partnering with Bell Canada to develop a portal site including everything from educational materials, to a natural-habitat locator, to policy documents. The organization is also considering piloting a new process in which interested individuals can become associate members through the website by “signing on” to 4 sets of values, enabling them to receive free email updates about the Federation’s activities. Faught notes that there is the potential to develop over a million associate members in Ontario through this program. These examples of best practices support the findings of the McKinsey report that stress that effective infrastructure and information systems are integrated with the mandate of the organization.

#### **Diversity**

Second, the interviewees identified their ability to include diverse constituents as a factor in determining their success. Eileen Palmer of the Land Conservancy of BC notes that diversification of both programs and memberships has enabled TLC to reach audiences who might not have otherwise contributed:

*Our Conservation Partners Program involves working landscapes, and so we get people involved who wouldn’t usually be a part of the environmental movement ... [it is important] to find ways of persuading other audiences who might not usually be involved in environmental work. Land Trusts are very pro-active, and it’s an easy idea for people to sign on to.*

This potential for Land Trusts to bridge seemingly disparate interests under one roof is also evident in Ian Barnett’s comments surrounding the need to operate with both “substance & style.” “When in the land conservation stewardship business it is vital that the people who represent you be professional, presentable, and amiable ... [and] who appeal to a wide variety of people ... we need people who can genuinely meet with ranchers and farmers, but who can also provide adequate scientific knowledge to

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<sup>8</sup> For an in depth discussion of the relationship between the structure of a stewardship and conservation organization and the best practices it adopts, see Baird Straughan’s study “Four Stage and Four Challenges of Organizational Development (1999) [www.icl.org](http://www.icl.org)

<sup>9</sup> This registry is online at the Land Trust Alliance of BC’s website, [www.landtrustalliance.bc.ca](http://www.landtrustalliance.bc.ca)

their peers and other NGOs.” Due to the community-based focus of the work, these organizations suggest, stewardship and conservation organizations are uniquely positioned to reach broader, large scale audiences especially if they are able to effectively articulate their shared values and goals. Jim Faught identifies the following upcoming challenge for the Federation of Ontario Naturalists:

*Another critical change is to see that we represent the dynamics of Canada and Ontario ... overall, the conservation is a fairly elderly, WASPy kind of culture, and we need to bring in culturally diverse members. We need to shift our attention to new Canadians ... to help them understand what we are doing, expressing our shared values, and asking them to support us.*

Faught’s comments suggest that stewardship and conservation organizations’ capacity to communicate their goals, values, and achievements to increasingly diverse constituents will become a key factor in their future success.

## Conclusions

This research applies a benchmarking framework to identify the best practices of six Canadian stewardship and conservation organizations. The results of this study provide readers with examples of current successful practices in the field. They also identify some of the barriers to success that stewardship and conservation organizations currently face. The organizations interviewed identified the following as key barriers to organizational success:

- Lack of financial resources
- Lack of public awareness of stewardship and conservation issues and activities
- Difficulties in providing adequate recognition to various partners and a lack of coordination between partners
- Inability to retain staff due to lack of financial resources.

These results support the findings of larger studies such as the Evergreen Canadian Land Trust Survey (2002) and the Volunteer Sector Stewardship in Canada Report (2002). These studies identify similar areas of concern for stewardship and conservation organizations, including: the lack of financial resources, especially program funding and long-term core funding; the need for awareness and education programs; the need to retain and train staff & volunteers; and the importance of improved networking among groups.

At the same time, the best practices highlighted in this report demonstrate that successful strategies are rooted in the core values of the conservation movement, including collaboration, local action, and science, to name a few. As stressed by the VSI report, the “guiding principles [of] a stewardship support system [should] be: built on existing, trusted organizations, built from the grassroots-up, and respect regional differences” (2002).

Just as successful organizations build their strategies and activities from their vision, mission, and goals, studies such as this one assist stewardship and conservation organizations in identifying and developing best practices that are specific to core stewardship and conservation values. Through the benchmarking tool developed below (see Appendix B), this study helps organizations to evaluate their own activities in relation to quality practices and procedures used by other stewardship and conservation organizations. This process of evaluation encourages organizations to measure their success not only quantitatively, (e.g. in terms of acres of habitat secured) but also qualitatively (e.g. in terms of effective community engagement). As such, this study is a step towards enabling organizations to more fully articulate their capacities and skills to a wide range of audiences, from government agencies, to foundations, to private donors.



Moreover, the results of this research suggest that, as stewardship and conservation organizations articulate not only the environmental but also the social impact of their activities, they will be able to effectively appeal to a broad cross-section of Canadian society. As Eileen Palmer comments, “diversification is what makes a land trust successful ... diversification is finding that broader audience, and pushing the limits of involving a majority of folks in what you are doing.” As a result of their commitment to locally-driven projects and their extensive collaboration skills, stewardship and conservation organizations can attract a wide range of constituents holding a variety of perspectives. Indeed, the depth and diversity of the practices that these organizations are currently developing, testing, and refining, show the creativity of non-profit organizations and their on-going contribution to the success of the stewardship and conservation movement in Canada as a whole.

## **Appendix A: Organizational Profiles**

### **Ducks Unlimited Canada (DU) [www.ducks.ca](http://www.ducks.ca):**

Is one of the largest non-profit charitable conservation organizations in Canada. With the mandate of “conserving, restoring, and managing wetlands and associated habitats for NA waterfowl,” Ducks Unlimited focuses its activities on habitat conservation, research, and education. Ducks Unlimited employs over 450 staff in 40 offices, with 8,000 volunteers contributing to its programs. Ducks Unlimited currently has 150,000 members and supporters and has been operating as a conservation organization for 65 years.

### **Evergreen [www.evergreen.ca](http://www.evergreen.ca):**

Is a national non-profit, charitable environmental organization with the mandate of bringing nature to Canada’s cities through naturalization projects. Evergreen operates three core programs: School Grounds, which has helped over 1,300 schools across the country to green their grounds, Common Grounds, which works to conserve publicly accessible land, and Home Grounds, which encourages environmentally-friendly landscaping practices. Evergreen has 22 full time and 8 part-time staff operating in two main offices in Toronto and Vancouver and is supported by approximately 250 members and supporters. Evergreen has received the Peter F. Drucker Award for Canadian Non-profit Innovation as well as several awards for environmental education. Evergreen has been operating for twelve years.

### **The Federation of Ontario Naturalists (FON) [www.ontarionature.org](http://www.ontarionature.org):**

Is a registered charity with the mandate of protecting nature through research, education, and conservation action. FON advocates for the protection, preservation, and responsible management of woodlands, wetlands, and wildlife, as well as preserving habitat through its own system of 18 nature reserves throughout Ontario. The Federation has approximately 35 staff, over 30,000 members and supporters and represents 125 member groups across Ontario. The Federation has been operating since 1931.

### **The Land Conservancy of BC (TLC) [www.conservancy.bc.ca](http://www.conservancy.bc.ca):**

Is a charitable membership land trust working to secure areas of scientific, historical, cultural, scenic, or recreational value. Through a combination of conservation covenants, long-term leases, and land acquisition, TLC currently protects of 82,000 acres of land throughout BC. TLC operates with a staff of 30 located throughout BC, is supported by over 800 volunteers and over 1,200 members. The Land Conservancy of BC has been operating for six years.

### **The Nature Conservancy of Canada (NCC) [www.natureconservancy.ca](http://www.natureconservancy.ca) :**

Is a national charity dedicated to preserving ecologically significant areas through outright purchase, donations, and conservation easements. To date, the Nature Conservancy of Canada has secured over 1.7 million acres of woodlands, seashores, wetlands and prairies throughout Canada, with the growth of 122 new conservation areas annually. The NCC operates with staff in 7 different regions and has been operating for approximately 40 years.

### **The Nova Scotia Nature Trust [www.nsnt.ca](http://www.nsnt.ca) :**

Is a non governmental, charitable land trust whose mission is to protect significant natural areas on private land in Nova Scotia. The Nova Scotia Nature Trust pursues land ownership, conservation easements, and cooperative agreements. The land trust is supported by a membership of approximately 250 members and employs a staff of 8. The Nova Scotia Nature Trust has been in operation for 8 years.

## **Appendix B: Benchmarking Tool**

This is a short assessment tool based on the indicators developed and explored above. This tool is designed to provide you with a general indication of your organization's strengths and weaknesses. You may find it useful to gather responses from a variety of people involved in the organization, such as staff, board, volunteers, and members. For a more in-depth exploration of organizational capacities, please refer to the McKinsey Capacity Assessment Grid, or to the Institute for Conservation Leadership's "Benchmarking Workbook" ([www.icl.org](http://www.icl.org))

Rate your response to each practice according to the following system:

1. Our organization does not have experience with this practice
2. We are working to develop this practice
3. We engage in this practice regularly in a competent manner
4. We engage in this practice regularly and can teach or model this practice to others

After responding to all of the questions, add up totals for each indicator. If you have ranked your organization with mainly 1 –2s, this indicates an area of work for your organization in strengthening your practices. If you have ranked your organizations with mainly 3 –4s, this indicates an area of strength that contributes to your organization's success.

### **Questions for Reflection:**

- 1) Of the areas you have identified as needing development, which are most important to the organization at this time? How might your organization devote time or resources to this area? How do these needs for development relate to your current activities?
- 2) Of the areas you have identified as areas of strength, which might be further built upon or expanded? How might your organization identify new directions, activities, or services based on these areas? How is your organization's success different from other stewardship and conservation organizations in Canada?
- 3) How are the responses of staff, board, volunteers, and members to this tool different? Why?
- 4) How might the strengths and weaknesses identified impact on the following: a) your organization's daily activities b) your organization's governance structure?

Indicator	Practice	1	2	3	4
<b>Vision &amp; Values</b>	Has a clear, concise vision and mission which staff, board, and members are able to articulate				
	Uses key messages or taglines in its communications which tie into the vision and mission of the organization				
	Has a standardized method of selecting stewardship & conservation projects				
	Above method is based on the organization's vision, mission, goals				
	Staff are able to articulate how their daily activities relate to the organization's mission				
<b>TOTAL</b>					
<b>Community Engagement</b>	Has a clearly defined community (either geographic or conceptual) that it serves				
	Has a keen understanding of the needs of its community				
	Has a high level of local involvement in its projects:				
	a) community members participate as volunteers				
	b) community members have input into shaping project priorities				
	c) community members can easily represent the project to others				
	d) community members can articulate benefits of the project to themselves and the public at large				
	Has a high level of members & supporters proportionate to the community it serves				
	Uses a variety of communication tools, including newsletters, emails, special events, news releases, interviews, advertising, opinion editorials				
	Organizational structure facilitates community engagement (e.g. large organizations operate with decentralized staff, smaller organizations include outreach as a part of their job responsibilities)				
<b>TOTAL</b>					

<b>Indicator</b>	<b>Practice</b>	<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>
<b>Sustainability</b>	Is successful in researching and receiving grants from foundations or government				
	Runs in fee-for-service activities that are related to the overall goals of the organization				
	Has developed organizational structure to allow for enterprising activities (e.g. incorporated an arm of the organization as a business)				
	Has established an endowment fund that is growing in size				
	<b>TOTAL</b>				
<b>Partnership Building</b>	Informally shares information with other organizations in the field on a regularly basis				
	Works with a variety of partners, such as alliances or federations, other related non-profits, professional associations, government agencies, corporate sponsors, industry, agricultural workers and private landowners				
	Works with partners based on shared goals and objectives that can be easily articulated by all partners				
	Staff spend time and resources developing working relationships with partners.				
	Organization's involvement in joint ventures is included as a part of its strategic priorities				
	Organization has standardized procedures and protocols that it uses when working with partners				
	Has been publicly recognized for its work in partnership – e.g. other partners represent organization positively to their constituents				
	<b>TOTAL</b>				

Indicator	Practice	1	2	3	4
<b>Leadership &amp; Commitment</b>	Organization has a diverse board that reflects its areas of focus				
	Staff are involved in the decision making on projects and in organizational direction				
	Staff have:				
	a) flexibility in projects				
	b) opportunities for creativity in their work				
	c) a high level of responsibility				
	Board and management are comfortable in delegating responsibility to staff.				
	Staff have a strong sense of shared values and commitment to the organization				
	Volunteer programs are targeted to meet organization's program needs				
	Volunteer programs are designed to meet fundraising needs Volunteers have a clear understanding of their rights and responsibilities				
	<b>TOTAL</b>				
<b>Evaluation and Risk Management</b>	Organization uses evaluation systems that interrelate to strategic plans and measures				
	Board and staff have a clear understanding of risk management and this is reflected in their policies				
	<b>TOTAL</b>				
<b>Technology</b>	Uses new technologies effectively, integrates into existing programs Models of technology used are adopted by or shared other organizations				
	<b>TOTAL</b>				
<b>Diversity</b>	Organization develops programs and communications with the aim of reaching a diverse and broad community				
	<b>TOTAL</b>				

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