Leadership of Land Trusts: Generational Transition and Preparing for the Future

Working Paper WP16JH1

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July 2016

Abstract

This paper, part of the Lincoln Institute of Land Policy's Kingsbury Browne fellowship awarded in conjunction with the Land Trust Alliance's 2014 Kingsbury Browne Conservation Leadership Award, examines generational transition in the land trust community. It specifically looks at how both senior and emerging leaders of land trusts view the changes that have occurred in the land trust community over the last 35 years; what challenges the two generations see ahead for land trusts and their leaders; skills and resources leaders will need to meet those challenges; how lands trusts can plan for generational succession; and how knowledge and experiences can be shared most effectively between generations. The research is informed by 24 formal interviews and additional informal conversations with emerging and senior land trust leaders, a review of a wide range of current and historical documents and reports, and the author's personal experience of nearly four decades in land conservation and land trust work. She hopes information presented here will be a catalyst for further discussion and actions.

About the Author

Jean Hocker is president of Conservation Service Company, LLC, a consulting firm that draws on her long experience with land conservation and nonprofit organizations. From 1987 to 2002, she was President and CEO of the Land Trust Alliance and subsequently served five years as a member of the Land Trust Accreditation Commission. From 1980 to 1987, she led the Jackson Hole Land Trust in Wyoming as its founding executive director. Jean is the 2014 recipient of the Land Trust Alliance's Kingsbury Browne Leadership Award and is a Kingsbury Browne Fellow at the Lincoln Institute of Land Policy. She chairs the board of the Wilderness Land Trust and serves on councils of the National Parks Conservation Association and the Grand Teton National Park Foundation. She has been a board member of the Lincoln Institute and the University of Wyoming's Ruckelshaus Institute of Environment and Natural Resources. A Phi Beta Kappa graduate of Boston University, Jean and her husband Phil have long enjoyed the outdoors as hikers, backpackers, and canoeists. She can be contacted at jean@hockers.com.

Acknowledgements

The author indebted to the many people who generously shared with me their time, experience, and intellect, especially the individuals who served on my Advisory Team and those who agreed to be interviewed. They are listed by name in the report and its Appendices.

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Introduction

Background

The land trust movement in the United States dates back to the closing years of the 19th century, with a handful of land trust organizations having now passed their 100th anniversary. However, the vast majority of today's 1,700 land trusts, about 70 percent, have been established since 1980.[1]

Many senior leaders of today's land trust movement, including this author, began their land trust careers at a time when there was scant understanding of land trusts or conservation easements. National land conservation organizations like The Nature Conservancy and Trust for Public Land did not identify themselves as land trusts, reserving that term for primarily small, local groups, many run solely by volunteers. Communication was largely by telephone or mail and through printed materials. There was little education or training aimed specifically at developing land conservation skills and little opportunity for a professional career path in land trust work.

After the Land Trust Alliance (the Alliance) was established in 1982, this gradually changed, as the new organization began to build a communications network among land trusts, as well as to publish books and provide training programs to increase their skills. Still, most land trust leaders who started out in the 1970s and 1980s depended a great deal on "trial and error," talking with fellow practitioners when they could, and seeking out the very few lawyers and other professionals who understood their work. In the process, these senior leaders pioneered tools and strategies that led to protection of tens of thousands of acres of conservation land and helped build successful, enduring organizations. Many continue to make substantial contributions to land conservation today. As they begin to wind down their careers, they bring enormous wisdom, experience, and insight to the movement's present and future. They serve as innovators, mentors, and thinkers, as well as practitioners.

At the same time, a new generation of land trust leaders has emerged, who will determine the future of the land trust movement for the next two or three decades. They are heading land trusts at a time of growth and change in the movement: when "land trust" and "conservation easement" are recognized concepts; when land trust standards and practices are in place, accreditation is increasingly sought, and training for land trust work is readily available; when a career path exists within the land trust industry; when social networking defines communication. They recognize the interplay between public policy and private action and learn to be policy advocates. They also realize that, as land trusts have become better known and more successful, they face heightened community expectations for the use and stewardship of the land they have conserved. And they are increasingly challenged to ensure that the land they protect enhances the

[1] See the Land Trust Alliance's 2010 National Land Trust Census Report
http://s3.amazonaws.com/landtrustalliance.org/page/files/2010LandTrustCensus.pdf
The 2015 Census is currently underway, with publication of results expected in the fall of 2016

lives of a broad segment of their communities.

Purposes of this Paper

This paper examines generational transition in the land trust community, specifically:

- how both senior and emerging leaders of land trusts view the changes that have occurred in the land trust movement;
- how the two generations define the challenges ahead for land trusts and their leaders;
- what skills and resources leaders will need for the work ahead;
- how lands trusts can plan for generational succession within their organizations and throughout the land trust movement; and
- what kinds of knowledge and experiences can be shared most effectively between generations, and by what means.

Methodology

Between July and December, 2015, I conducted 24 interviews, each lasting about one hour.[2] Interviewees included ten senior land trust leaders, eleven emerging leaders, and three professionals whose work gives them an overview of land trust leadership.[3]

In addition to formal interviews, I had many informal conversations with other land trust leaders, many of them at the Alliance's annual land trust conference, known as the Rally, in October 2015. I also took part in the Alliance's Leaders Summit, an all-day retreat just prior to the Rally for invited land trust leaders. Additionally, I reviewed a variety of literature, both current and historical, including publications, periodicals, conference proceedings and programs, reports, and other materials relating to the topics covered in this report.

Finally, as the founding executive director of a land trust in 1980 and later CEO of the Land Trust Alliance for nearly 15 years, I have also drawn on my own experience and personal files.

At various points in my research design and development, I have enlisted the review of an informal advisory team, who have provided considerable insight and assistance, for which I am very grateful. This team consisted of Mark Ackelson, president emeritus of the Iowa Natural Heritage Foundation; Meghan Dennison, executive director of the Bayfield Regional Conservancy (WI); Renee Kivikko, director of education, Land Trust Alliance; Jeanie Nelson, founding executive director of the Land Trust for Tennessee; and Ryan Owens, executive director of the Monadnock Conservancy (NH).

[2] See Appendix A for questions posed.
[3] See Appendix B for a list of interviewees.

Senior and Emerging Leaders: Compare and Contrast

Defining the Generations

This study focuses on land trust leaders who have already attained some degree of leadership in land conservation. For the most part, interviewees have served, or are currently serving, as land trust executive directors.

For purposes of this study, I have used the definitions below to categorize "senior" and "emerging" generations of land trust leaders. Although interviewees did not always neatly fit every attribute of these definitions, I also considered age, gender, geography, mission and size of land trust, length of land trust involvement, and other factors in selecting interviewees.

Senior Leaders: hold or have held recognized leadership roles in the land trust movement. They began land trust work in the 1970s to early 1990s, have 25-30+ years of land trust experience, maybe recently retired from a full-time land trust role or are looking at retirement within 5-10 years. Most senior leaders interviewed are in their late 50s to early 70s.

Emerging Leaders: hold an executive director position at a land trust. They have 5-15 years of land trust experience, are generally age 30-45, and can anticipate, if they choose, some 20 to 30 years of a professional career ahead.

What is Their Educational Background?

There is no significant difference in educational focus between generations. Both senior and emerging leaders interviewed evidenced early interest in natural resources, science, the environment, and land use. Almost all interviewees chose undergraduate majors in one of these fields, though two majored in English and one in world religion and literature. Several younger leaders hold undergraduate degrees in environmental studies, a major which did not exist when older leaders were in college.

The majority of those who hold graduate degrees (six do not) focused on natural resources and planning. Others hold advanced degrees in law, landscape architecture, and political science.

Why Do They Stay?

Virtually all of the leaders, regardless of generation, share a strong passion for the natural world, often fostered by experiences early in life. And they share a specific love for the way land trusts work. Over and over, their stated reasons for staying, or planning to stay, in land conservation work, include:

- the tangible impacts and results;
- the voluntary (not regulatory) approach;
- the changing nature of the work, with its constant new challenges;
- opportunities to bring people together around land;
- getting to work with great, compassionate people;

- the satisfaction and fun of doing deals; and
- the knowledge that they are saving land for future generations.

Growing Career Paths

As the numbers and professionalism of land trusts have grown over the years, the opportunities for individual professional growth and advancement within the land trust field have expanded. The difference in career opportunities for the two generations is most vividly illustrated by the employment experiences of interviewees.

Most senior leaders interviewed have spent the majority of their land trust careers with only one or two organizations. They may have started as an intern, in an entry-level position, as a founding director, or as one of a very few staff members in a fledgling organization. A few initially joined organizations that were already well-established, but most have matured along with the first or second organization they joined. Although these leaders have contributed significantly to the entire land trust industry, their leadership has emanated from one or at most two organizations with which they have long been identified.

By contrast, at least half of emerging leaders have already worked for one or two other land trusts before joining their current organization. When asked if they thought they would stay in the land trust field, all of the emerging leaders said emphatically that they would. But several envisioned themselves working at a different organization or in a different capacity in a few years. "I'd like to take a break from managing board and staff eventually–maybe work in a statewide or national role–or approach land conservation from a funder's perspective, helping others to succeed," said one.

Figuring Out How to Do It

Land trust work, especially that of an executive director, can be exceedingly complex, requiring skills in real estate, law, tax policy, natural resources, land management, politics, fundraising, board relations, personnel management, community outreach, data management, marketing, and much more. No one enters the land trust field knowing all of these things. Nor can any one person be expert in all of these areas. Nevertheless, from their first years working in land trusts, both senior and emerging leaders have had to become familiar with a broad array of skills in order to advance to leadership positions. How have they done this?

<u>For many senior leaders, learning under fire.</u>

> In 1972, land conservation wasn't a movement. It wasn't even particularly organized. It was mostly just people saying 'let's save this.' Two things stand out to me about that time: the wonderful, quirky, talented mavericks the effort attracted; and, how individuals made such a difference. I count many memories, and many mentors, from that time. [4]

For senior leaders, especially those who started out in the 1970s or early 1980s, learning the job

[4] Dan Pike, outgoing executive director, *Colorado Open Lands Spring 2015 Newsletter*.

was often a bootstrap process. For many early land trust folks, skills grew largely from learning-by-doing and through trial and error, drawing lessons from both successes and mistakes. "I learned under fire," says one. "I already knew about land use issues, but not about fundraising or politics." Another says he learned "by soaking it up."

The Nature Conservancy and the Trust for Public Land, national organizations that were relatively young themselves, were also resources for new land trust leaders in the late 1970s and early 1980s. In fact, at that time, TPL operated a program specifically to encourage and assist formation of land trusts in the western states. In the northeast, there were already a few well-established land trusts whose leaders could, at least occasionally, share information, experiences, and expertise. Some of those larger organizations had sufficient staff to provide internal mentorship and guidance to new employees.

The Land Trust Alliance becomes a resource

Then in the fall of 1981, the Lincoln Institute of Land Policy (the Lincoln Institute), inspired by Kingsbury Browne, convened the National Consultation of Local Land Conservation Organizations (the Consultation), a meeting of forty invited land conservation leaders, the majority from local or regional land trusts across the United States. It was the first-ever national gathering of land trust leaders, most of who had never before met face-to-face. Here, a national sense of common purpose arose and participants recognized the needs for (1) professionalism, (2) communication, (3) taking unified positions on policy issues affecting land conservation, and (4) marketing land trusts to the general public as a positive social tool.[5]

From that gathering emerged a new umbrella organization known as the Land Trust Exchange, later re-named the Land Trust Alliance.

For emerging leaders: peers, mentors, the Alliance, and learning-by-doing

As the Alliance grew, it became a resource for training, convening, coordinated policy action, and sharing of experience and expertise among land trust leaders.[6] Today, it is the major single source of training and education for land trust leaders.

But emerging leaders also frequently learn from one another. Many have been part of the Alliance's two-year Leadership Program for emerging land trust executive directors, through which they have not only received training but have developed a network of peers whom they tap for advice and sharing of experiences. Where active state-wide land trust coalitions exist, these also are a resource for networking and learning.

Finally, like the senior leaders, emerging leaders depend on learning-by-doing.

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[5] See *Proceedings 1981 National Consultation [of] Local Land Conservation Organizations.* Allan D. Spader, editor. 1982. Land Trust Exchange.

[6] For an overview of the founding and growth of the Land Trust Alliance, see *The Land Trust Alliance Journey: 30 Years of Conservation Success,* by Jean Hocker, with assistance from Karen Spern, Available from the Land Trust Alliance.

How Do the Generations View Each Other?

In general, senior leaders are very impressed with the intelligence, energy, and ideas of younger leaders. And emerging leaders have great respect for the vision and accomplishments of the generation before them. But, not surprisingly, each generation has its own perspectives, as well.

Leaders in both generations acknowledge that now-senior leaders, in their earlier years, operated with fewer expectations regarding professionalism and structure than is expected today. Perhaps as a result, older leaders tend to see younger ones as "less scrappy," more risk averse, and less creative than they think they were–operating with more responsibility but less passion. And at least one younger leader concurred that "[w]e are probably more sophisticated and professional, but maybe have less entrepreneurial hustle." Another younger leader notes that some senior leaders have operated with a "wild west approach," and says they ask younger leaders, "Why are you such sticklers? You're losing chances to get things done."

Many senior leaders think that greater bureaucracy in today's land trusts has produced fewer generalists and more people who work in silos, who depend on technology sometimes at the expense of personal relationships–and even efficiency. As one said: "Land trust leaders are more sophisticated now. They have a lot of technology [like] GIS systems. But some are time wasters. Sometimes the back of a bar napkin works just as well as elaborate mapping."

Some emerging leaders see some older leaders as "stuck in their ways" and even stuck in their top-level jobs. There is an occasional undercurrent of wishing senior leaders would step aside to "make room" for younger leaders to advance.

However, as this paper discusses later, emerging leaders do think their seniors have a lot of wisdom and experience to impart and would like to see ways to make that happen

The Evolving Community of Practice

To understand how today's senior leaders might share knowledge and experiences with their younger colleagues–and how emerging leaders can best use that experience–it is useful to look more closely at the operating environment each generation has encountered upon entering and progressing in their land trust careers.

The Land Trust World 35 Years Ago

In preparation for its 1981 Consultation, the Lincoln Institute conducted the first-ever National Survey of Local Land Conservation Organizations.[7] The survey found at least 400 organizations identified as probable land trusts. About 100 of them had been formed before 1964; the oldest was about to celebrate ninety years of land conservation. Although some were well-staffed, established groups, only about a quarter had any paid staff. Not surprisingly, about 75 percent cited financial difficulties as their principal problem. The survey report summarized the most

[7] For summary information from the 1981 survey, see *Proceedings, 1981 National Consultation [of] Local Land Conservation Organizations.* Allan D. Spader, Editor. Land Trust Exchange. 1982. Pp. 4-5 and 88-91.

common problems responders mentioned as "lack of money, staff, and support from the public and local officials."

The working definition of a land trust was a local or regional nonprofit organization that protected specific parcels of private land through individual land transactions. The transaction of choice throughout most of the 20th century had been outright acquisition of land, by gift or purchase, for conservation purposes. Sometimes land trusts retained and managed the land; sometimes they conveyed it to a public agency. Then starting in the 1960s, conservation easements became increasingly employed, most widely, but not exclusively, in the west. By the 1990s, the amount of land that land trusts had protected by easements began to exceed the amount protected by fee acquisition.

When the Lincoln Institute held its Consultation, many established land trusts had become pretty good at "doing deals." But, as the Consultation proceedings observed,

> [participants] seemed much more comfortable talking about land-saving techniques than they did discussing questions of institution building: i.e., administration, membership, funding, professional development, lobbying, and the building of community support. …it is becoming increasingly evident that greater attention must be paid to strengthening the organizational foundation–the institutional capacity–of each local program, large and small.[8]

Other concerns, as noted in the report, included land management, monitoring and enforcement of easements, capacity to take collective action on federal tax regulations and policies, and the need to build community support and acceptance through communications, education, and marketing.

The Land Trust World Today

Today's emerging leaders are operating in a very different climate and with far more resources. To be sure, they still focus on conserving open spaces of all kinds. They still acquire land and conservation easements. They still have concerns about strengthening their institutions and, perhaps especially, about funding and building community support and acceptance. But there has been much change and progress.

<u>The growth of land trust numbers has leveled off</u>

The period from 1981 through the mid-2000s was a time of exceedingly rapid growth in numbers of individual land trusts, rising from about 400 in 1981 to 1,667 in 2005.[9] At one time, the Alliance touted that "a new land trust is formed every week." However, this growth was not always a good thing, as many new and small land trusts did not have the resources or capacity to succeed. Some land trusts merged while others expanded their geographic reach to negate the need for yet another new land trust. A few went out of business and it is likely that some never

[8] See *Proceedings, 1981 National Consultation [of] Local Land Conservation Organizations.* Allan D. Spader, Editor. Land Trust Exchange. 1982. pp. 10-11.
[9] See the Alliance's 2005 National Land Trust Census Report.

became active at all. By the 2010 Census report, the numbers of land trusts had leveled off at about 1,723, including 24 categorized as operating at a national level.

Greater professionalism

It is widely agreed that successful land trusts are much more sophisticated and professional now, that their leaders are much more aware of their obligations to lead well-run, business-like organizations that will endure (if not for perpetuity, then for a very long time). Programs of the Alliance, starting with establishment of *Land Trust Standards and Practices* in 1989 and especially the advent of accreditation, are viewed as fundamental reasons for this.[10]

Focus on stewardship

Two or three decades ago, stewardship of land and easements, although an acknowledged responsibility, was largely a distant concern for many leaders; saving open lands before development took over was a much higher priority. Today, as land trusts control more and more conservation land, leaders know that managing trust-owned land and monitoring and enforcing conservation easements are very high priorities, both to fulfill the land trust's mission and to protect the organization's credibility. Land trusts have responded by increasing both the time and money devoted to stewardship.[11]

More programs, more staff, more management

The growing responsibilities of land trusts, increasing demands for their services, and additions to their core missions and programs require increases in staff sizes. Most of the emerging leaders interviewed have recently increased the size of their staff and/or expect to add staff soon. Likewise, a consultant who advises land trusts on organizational matters agrees that the staff size of organizations he works with is definitely growing, now typically about 5-7 people. But many are, or soon will be, larger than that.

Younger, newer leaders often have less experience and confidence in their fundraising and staff management skills than they do in their land protection skills. Yet they know they need to learn these skills and to direct considerable time to them.

Fundraising more than ever

Growing organizations and programs mean larger budgets. Achieving and maintaining accreditation standards may increase operating expenses. Acquisitions now typically require at least some purchase money, from either private or public funds. As a result, land trusts need to raise more money than ever, for monitoring and stewardship, legal defense and enforcement, new land and easement acquisitions, and operating reserves. Some are exploring financing techniques

[10] As of early 2016, 342 land trusts, from major national organizations to local, all-volunteer groups, had earned the hard-won seal of the Land Trust Accreditation Commission, with many more land trusts in the accreditation pipeline. (See www.landtrustaccreditation.org).

[11] From 2005 to 2010, according to the Alliance's 2010 National Land Trust Census report, state and local land trusts more than doubled the amount of funding dedicated to monitoring, stewardship, and legal defense.

that attract and leverage private investment capital for land conservation.

The Alliance's 2010 census reports that the average operating budget for state and local land trusts grew by 36 percent between 2005 and 2010; although noting that the increase was driven primarily by land trusts budgets at the upper end of the scale. State and local land trusts also increased the amount of money in designated funds for stewardship, legal defense, acquisition, and operations by 80 percent during the same five years, to a collective total of over $1.3 billion dollars reported in 2010.

Community Conservation: relating land conservation to people's lives

The days when land conservation was simply a transaction between a land trust and a landowner are receding. Virtually all land trust leaders are asking "Who are we saving land for?" They recognize that there is currently great inequity in access to open spaces and that land trusts have an obligation to address this by serving broader constituencies. As Peter Forbes offered in his 2006 essay "What is a Whole Community?"[12]

> We speak of 'protecting' land through conservation easements or fee acquisitions but how do these tools 'save' land from climate change, acid rain, or a public that simply no longer cares? To be truly meaningful and enduring, the work of conservation must be grounded not just in legal statutes, but in people's hearts, minds, and everyday choices.

Or, as two emerging leaders put it:

> The power of land trusts is that they now control a great deal of land. The question is: what do they do with it? How does all this land relate to people's lives?
>
> Land and water conservation continue to be our core mission, but the pressures of development…and the increased complexity of our promise to protect land in perpetuity requires that we continue to engage our communities and strengthen our industry.

Leaders know that the world around them is changing and they are trying to respond. They realize that success brings responsibility and higher expectations. And they are convinced that strong engagement with their communities and the diversity of people that comprise them is essential for their land trusts' long term support and success.[13]

Each land trust is defining "community conservation" in ways that make sense for its unique mission, community, operating environment, resources, and skills.

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[12] Forbes, Peter. 2006. *What is a Whole Community? A letter to those who care for and restore the land.* Center for Whole Communities. Fayston, VT.

[13] This is not a new idea; topics at an Alliance leadership retreat in 1999 included: "Beyond the Acres: What differences is our work making to families, to communities, to business decision makers, to land users?" and "Reaching Out to New Constituencies: What does diversity mean? How can we diversify our organizations and the land trust movement?"

For a land trust that has solely focused on protecting ranchland through easements, community conservation means taking on its first trail project for public use. For another land trust, it means restoring degraded publicly-owned open space so more people will want to use the property. It can mean creating community gardens or vest-pocket parks in dense urban areas or helping a city plan and build a new outdoor recreation system within its city limits. It can mean partnering with health care providers, churches, Native American tribes and school systems. It almost always means collaborating in new ways, with new segments of the community. None of these is a brand new idea for land trusts; but the momentum among land trust leaders to think and act more broadly has never been greater.

Challenges Ahead

Perpetuity: Fulfilling the Promise

Virtually all of the challenges land trust leaders see ahead are related to a single overriding goal: fulfilling the promise of perpetuity. Today's land trust leaders are keenly aware of the responsibilities their organizations, and all land trusts, have assumed. They take seriously the mandate to ensure that land trusts can carry out their responsibilities in ways that will have meaning for countless generations to come.

Within that context, several specific challenges come up over and over when land trust leaders–regardless of generation–talk about their work. They are prominent in conversations, interviews, workshops, and published materials. While by no means all of the challenges land trust leaders recognize, those listed below stand out in this study.[14]

Achieving Sustainable Funding

Financial stability is essential in order for land trusts to have space to thrive and grow. Yet, while land trusts are attracting more funding than ever, many are stretched very thin, and leaders are uncertain about their ability to expand to meet the needs they see ahead. There is a constant tug between doing work now and preparing for the future. As one senior leader said: "Basic fundraising skills need to become automatic and institutionalized so land trusts will have room to grow and innovate. We need to teach those basic skills better."

Beyond the basics, successful land trust leaders will need to attract support and funding from non-traditional sources–including collaborations with new kinds of partners and investors[15], as noted in this observation:

[14] Somewhat surprisingly, few people mentioned climate change as a major challenge, perhaps because of uncertainty about what land trusts' response should be and how much difference one organization can make. However, one coastal land trust leader said the prospect of climate change is changing how they draft some easements. Others are beginning to focus on protecting properties that may be affected by sea level rise or on lands that provide habitat connectivity. Still others are increasing educational programs on impacts of climate change. See http://www.landtrustalliance.org/topics/climate-change for further discussion of land trusts and climate change.

[15] The Conservation Finance Network, which grew from discussions initially held at the Lincoln Institute in 2006, explores innovative funding and financing strategies for conservation. See www.conservationfinancenetwork.org

> Land trusts need to become pro-active and be willing to take risks in finding money to make deals work. [They] need to learn how to piece together combinations of money, using a 'layered' approach. They need to first ask 'Where is the money?' then ask 'How can we get it.?'

Defending and Enforcing Conservation Easements

"Conservation easements are a time bomb," said one senior leader, a warning with which there is broad agreement among land trust leaders.

The 2010 census found that local and state land trusts alone held easements over nearly 9 million acres of land. Many of these easement-protected properties are now, or soon will be, in the hands of second or third generation owners, leading to more violations. Over time, leaders anticipate that virtually all easements will be challenged.

In addition, some leaders of land trusts established decades ago can see a time when most undeveloped lands in their communities or regions will have been protected. When that time approaches, the land trust's role may change significantly to become largely that of a stewardship organization.

In 2011, the Land Trust Alliance created Terrafirma "as a charitable risk pool owned by participating land trusts that insures its members against the legal costs of defending conservation. It is available for all Land Trust Alliance member land trusts with conservation easements or fee lands held for conservation."[16] Land trusts insured under this program must establish eligibility either by being accredited or attesting to required practices.

While a huge step forward in addressing potential litigation costs, the insurance does not cover all costs associated with monitoring and enforcing easements – and certainly not the growing staff time involved in easement stewardship. Nor does it address easements held by land trusts that do not meet eligibility requirements or that choose not to participate.

In addition, the land trust community must continue to pay attention to those land trusts that are ill-prepared to meet their easement stewardship responsibilities. As one senior leader stated: "We need to realize that some land trusts are marginal, and be aggressive about…getting them to shape up." We also need to be aware, he stresses, that some marginal groups will drop out of the land trust business, leaving the problem of "orphan easements."

Building a Bigger Tent: Defining "Community Conservation"

Land trust leaders are keenly aware of operating in a changing world–of minorities becoming majorities, boomers aging, millennials taking over, populations becoming more urban, people spending less and less time in the outdoors. Leaders are serious about embracing broader audiences. But they are not so certain about how to do that in ways that are appropriate for their land trust's mission, culture, capacity, and community. As one young leader said: "I hope we don't try to create a definition of 'community land conservation.' We should not try to put it in a

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[16] See http://terrafirma.org/about

box."

Some leaders observe that, for better or worse, the evolving focus on protecting land for people is changing the kind of land that gets protected, with less focus on ecological values and wild lands. Indeed, the Land Trust Alliance's description of Community Conservation[17] stresses that community conservation is, among other things, "*not* primarily driven by scenic or ecological concerns."

But, asserts one senior leader who strongly supports the growing emphasis on community conservation: "Protecting wild places isn't elitist. Those values are for people too. We need to do both."

Leaders have some uncertainty not only about kinds of land to protect, but also what new directions to take and what resources they can or should devote to activities that may not result in easily-measurable land protection. Boards, staffs, donors, and other supporters may not understand or agree with new ways of doing things. One senior leader, who believes it is important to expand land trusts' activities to be more people-oriented "so land trusts will always be relevant and supported" nevertheless says that

> [t]here are some tensions among my board and staff and supporters about mission drift. My board asks whether we are about nature or people. Longtime supporters fear nature preserves will be overrun by people and pets. They fear a slippery slope. These differences are not generational; some younger people are the staunchest defenders of natural area protection.

However, most leaders do not see these new directions as mission creep, if it is done deliberately and thoughtfully. Several described it as "mission evolution" and do not think it will diminish more traditional land conservation activities. In the view of one recently-retired senior leader:

> We do need to stay within our niche, focusing on land, water, and wildlife. But we need to expand our outreach too. Mission creep could be viewed [instead] as experimentation. The key is to know when to pull back, what not to do. These things are part of the natural maturation of land trusts.

As land trusts reach out to more kinds of people and tailor programs, messages, and partnerships to have broader appeal, the challenge ahead will be to create a bigger tent in ways that capitalize on, rather than dilute, the strengths, experience, and expertise land trusts have built over the years.

Attracting the Best and the Brightest

Virtually all of the young leaders interviewed expect to stay in the land trust profession. But with surprising frequency, leaders of both generations bring up the challenge of continuing to attract dedicated people into the land trust field and groom them for leadership positions. Most are also

[17] See http://www.landtrustalliance.org/topics/community-conservation

keenly aware of the need to attract more minorities to the land trust profession.

Several have identified young staff members who seem like potential land trust executive directors. But, as one senior leader noted, “They need support at all levels to help them grow into leadership positions.” This same leader laments the large numbers of younger staff who “have scientific or environmental education, but not a broad liberal arts background.”

This echoes the sentiment of a younger leader, who makes this observation about job applicants he sees:

> Though so many are eager and passionate, …their educations [are] far too heavily tilted toward the sciences [rather than] the more practical needs of land trust work (critical thinking, communications, legal basics, etc.). …I’m seeing job applicants who could identify and catalog every living thing on any given acre, but who don’t know a conservation easement deed from a Post-it note….What I need are people who can manage complex projects, earn the trust of others, think critically and hopefully write a complete sentence.

The desire to add people of color to their staffs is strong among land trust leaders, but few say they have succeeded in doing so. They realize that land conservation is generally not a priority for young minorities and hope to change that over time. They hope that as they expand their programs to relate land conservation to broader segments of their communities, they can better identify and attract potential staff members from the minority community. Working in urban neighborhoods and with inner city schools may attract more young people of color. Establishing fellowships and internships may be other ways to bring minorities into land trust work, as might establishing relationships with historically-black colleges.

Other challenges in attracting and keeping young potential leaders include:

- their expectations for work-life balance (a desire shared by many of the emerging leaders interviewed, although as one acknowledged: “I’m better at shielding my staff from overwork than [at] looking after myself.”);
- their need to pay off student loans;
- the small size of most land trusts, which limits how far a young staffer can advance;
- benefits, especially family leave and health insurance, that are not on the same level as those provided by many for-profit employers;
- a lack of time and money within organizations to provide adequate support, mentoring, and training; and
- a lack of interest among some able younger staff in becoming executive directors, as expressed in the observation that “[m]any who could become directors don’t want to. They don’t want the broad range of responsibilities; they want to be out on the land or just want to do deals. We need to make ED positions seem more attractive to them.”

Skills and Resources Needed to Meet the Challenges

Successful land trusts have always required an impressively broad range of skills: legal, real estate, negotiating, land and easement stewardship, fundraising, board relations, finances, communications and outreach, strategic planning, and more. Leaders must be sure all of those skills reside in the organization, through some combination of staff, volunteers, and contractors.

Indeed, the challenges of the next decade will require more sophistication and depth in all of the traditional skills of running a land trust. In addition, as land trusts move in new directions, they will need to develop what for many will be new skills.

Both generations particularly noted the following:

- Fundraising skills, at both basic and advanced levels, to obtain sustainable funding for operations and land transactions
- Management skills, to manage larger staffs and more complex programs (This focus was especially heard from emerging leaders of growing organizations)
- Communications skills, to better tell the conservation story and make it more relevant to broader audiences
- Cultural competency and community organizing skills, to reach new audiences
- Collaboration and partnership building skills, to engage broad sectors of the community
- Personal relationship-building skills, especially for younger people who have grown up depending on electronic communications (this observation comes especially from senior leaders)
- Political skills, to gain the support of public officials at all levels, and
- Priority-setting and time management skills, to help establish a culture of realistic work-life balance

There is also widespread agreement with the thoughts of one emerging leader that:

> [f]or land trusts to be relevant in the communities they serve they will need to attract not just environmental science or natural resource professionals but also look more closely at needed skills like inclusiveness, listening, openness to new ideas, ability to peacefully navigate through conflict, and that go getter attitude. Land trust professionals need to be able to speak in terms that resonate with people who do not see themselves as conservationists.

Generational Transitions: Encouraging a Productive, Smooth Succession

> There is a potential for a big set-back in land trusts when senior leaders leave. There will be a big loss of institutional knowledge. But we also need room for younger leaders to see their future, [to see] that there is a place for them to move up in to.[18]

[18] Observation of senior leader

When today's senior leaders began their careers, they looked to the handful of older, experienced leaders of the day for essential training and inspiration. Now, a much larger cycle of leadership transfer is taking place, a transition that will continue well into the coming decade. Because the whole land trust world is so much bigger, faster-paced, and more complex than it was thirty years ago, it is more important than ever that leadership transition be accomplished as smoothly and productively as possible.

Two components will be essential: planning for succession; and capturing the experience and knowledge of the senior leaders.

Planning for Leadership Transition

Because land trusts are typically small organizations, it is often difficult to identify and groom an inside successor. Thus, succession planning needs to be viewed as a community-wide priority. The whole land trust community needs to prepare for it, so there is always a pipeline of younger leaders prepared to move up.

A smooth transition between generations of leaders will require land trusts to begin planning for that inevitability. One senior leader noted that accreditation is one of the best ways an organization can prepare for transition. But it will also require senior leaders who are ready to "let go" and younger professionals who are ready to "step up." Right now, although a few organizations have adopted formal succession plans and some others are "thinking about it," succession planning appears to be the exception.

<u>Advice from other nonprofit sectors</u>

In 2008, the Annie E. Casey Foundation, the Meyer Foundation, CompassPoint Nonprofit Services, and Idealist.org joined forces to interview nearly 6,000 young nonprofit staffers about their perceptions of the benefits and disadvantages of heading a nonprofit organization. The resulting report, *Ready to Lead? Next Generation Leaders Speak Out*,[19] reports a number of findings that would sound familiar to land trust leaders.

The report also makes suggestions for addressing leadership transition, including advising current executive directors to:

- be good role models, especially related to work-life balance;
- provide reasonable salaries and benefits; and
- engage in succession planning, which "doesn't mean hand-picking and grooming a successor [but does] mean putting in place contingency plans in the event of an unplanned leadership turnover as well as planning for an eventual departure."

The report further urges that:

- "all executive directors should periodically ask themselves whether they are still the

[19] https://www.compasspoint.org/sites/default/files/docs/research/521_readytolead2008.pdf

right person for the job and how their continuing leadership affects the organization's ability to attract and retain talented staff and build future leadership," and
- training in leadership skills be made available to potential future executive directors in leadership skills, including "hard" skills, especially finance and fundraising, which younger people identified as important preparation for executive leadership."

A closer look at real succession plans and experiences

The Land Trust Alliance has included articles on leadership succession in its magazine *Saving Land* (see "The Retirement Bomb*"* in the Spring 2011 issue); in workshops at its National Rally (see workshop materials for "Sustainable Leadership: Planning for Succession and Executive Transitions," 2011 Rally); and other learning resources such as the Express Learning Kit titled "Emergency Succession Planning: On the Pathway to Sustainable Leadership."[20]

Helpful next steps would be sharing detailed information about actual succession plans land trusts (and other small to medium size nonprofits) have put in place, and exploring why some leadership successions are successful while others run into problems.

Capturing Senior Leaders' Experience for New Generations

Senior leaders have great respect for their younger colleagues and feel some obligation to pass on what they have learned over time. As one said: "Now is the time to capture the history and thoughts of senior leaders. They won't always be here!" But several observed that they need to be asked, that they don't want to impose on younger leaders.

Younger leaders likewise appreciate the decades of innovation, entrepreneurship, and hard work senior leaders have given to the land trust community. Despite the sentiment of some that senior leaders now need to let go, to "get out of the way," they also discussed many things they would like to learn from their older colleagues.

What can emerging leaders learn from their senior counterparts?

Younger leaders identified several areas in which they would especially value the experience and thoughts of their most experienced colleagues. These include:

- a sense of history, about individual organizations (How did our land trust get started? What problems were we trying to address? Why did we ever do *that* project?), and about the land trust community as a whole (How did land trusts come about? How did they become a "movement?" What changes have taken place over the years?);
- how to manage stresses associated with constant change and uncertainty;
- advice on organizational and staff management issues;
- the value of patience and the long view. How to handle setbacks, deal with mistakes, keep moving forward;

[20] http://www.landtrustalliance.org/emergency-succession-planning-pathway-sustainable-leadership

- how to successfully relate to and make good use of boards of directors;
- ways to become better problem-solvers; and
- practical, proven approaches to raising sustainable funding to support growing operations.

Senior leaders frequently cited the need for younger leaders to recognize the importance of building personal relationships through regular, face-to-face communication. "Land conservation is primarily a people business; you can't build relationships by relying on emails and other electronics–you need to spend time together," is a common theme that these leaders want to pass on.

How can wisdom and experience be shared?

When asked how experience and wisdom could effectively be transmitted, both emerging and senior leaders contributed ideas. A few younger leaders think there are ample opportunities to connect with senior leaders, through the Rally, workshops, and webinars. And many learn from older leaders, sometimes including board members, in their own organizations. But leaders also had a number of specific suggestions.

Set up mentoring programs. Emerging leaders cited mentoring as the most valuable way to learn from experienced leaders. Mentoring can be, and often is, a very informal arrangement between younger and older leader. But several people suggested a more formal arrangement, whereby a younger and older leader are "paired," perhaps for a year, with agreed-upon expectations of periodic "checking in" either on specific topics or just for general support. Pairings might be arranged based on similarity of life situations (a young female executive director with children paired with an older woman who has been in that same situation) or needed expertise (a young director of a rapidly growing land trust paired with a senior leader who has successfully overseen substantial organizational growth).

Create opportunities to share stories and case studies. Many younger leaders would like to hear experienced leaders' stories and case studies – both successes and failures, in land transactions and in organizational management. Although this might be accomplished in some fashion on-line, the value of face-to-face conversations came up often. One younger leader described her preference as "just a chance to sit down and talk with long- time leaders–to share stories and case studies–to have space to discuss mistakes, fears, and vulnerabilities – and just to pick their brains." These sessions could happen at the Rally or at regional land trust meetings. In addition, a way of capturing the most instructional stories for future sharing could be considered. One interviewee suggested a "Story Corps for Conservationists."

Arrange inter-generational discussion groups around specific topics or challenges. These too, could be in person (preferred by most interviewees) or electronic, as long as there is ample opportunity for real discussion. Attention to facilitation, mix of invitees, and relevance of topic would, of course, be important.

Create opportunities for younger and older leaders to work together on real problems. Committees, advisory groups, and task forces that are asked to examine and make recommendations on specific challenges can be effective ways to foster learning and transfer of experience.

Nurture future land trust leaders through internships and fellowships. Both senior and emerging leaders can help attract and keep future leaders by encouraging and arranging internships and fellowships. For example, since 1999, Colorado Open Lands has funded a fellowship program through which they have provided training and practical working experience to some 45 young people with recently-earned graduate degrees. The two- year positions are funded through private foundations and individuals, but variations could be funded as part of graduate and post-graduate programs. The key is providing a meaningful work experience within an active land trust, with opportunities to learn directly from today's land trust leaders.

Develop leadership training for future leaders. Structure leadership training for potential land trust leaders who have not reached the level of executive directors. Include discussions with older leaders about the challenges and rewards of leadership positions, as well as an introduction to specific skills, such as management, finance, fundraising, and communications, which leadership positions require.

What Happens Next?

Continuing the Discussion

The observations in this paper are based a limited number of interviews, plus a range of other conversations and sources, including the author's own land trust experience of more than 35 years. However, it does not purport to represent the views of all land trust leaders of either generation. It does not cover all of the changes in the land trust community, nor all of the challenges ahead, nor all of the skills today's emerging leaders will need to meet those challenges. Broader discussions would doubtless uncover many additional ideas, both about what emerging leaders would like to learn from today's senior leaders and how that knowledge might best be transmitted.

The author hopes this paper will encourage continuing multi-generational conversations and strategizing about the issues discussed here, leading to tangible responses and actions. Forums could be organized by the Lincoln Institute, the Land Trust Alliance, academic institutions, and other sponsors.

Continuing the Culture

Much has changed in the land trust community since the Lincoln Institute convened its Consultation some 35 years ago. We cannot predict what land trusts will look like in another 35 years, but we can be pretty certain that more change is ahead. Ensuring that land conservation is meaningful and even inspirational to all segments of our evolving population will be essential for land trusts in the decades ahead.

Among other influences will be the emergence of land trust-type organizations around the world.

Although other countries carry out land conservation in ways that are unique to their own laws and practices, they look to the decades of experience in the United States for ideas and inspiration. Relationships with these global efforts are likely to be one part of continued growth and learning of land trusts in this country.

Yet, the concerns of land trust leaders in 1981–strengthening organizations, acting collectively to influence public policy, maintaining grassroots individuality, stewarding conservation easements, building community acceptance and support–are entirely recognizable today. They just play out in different ways now, with more sophisticated methods and results.

Over the years, a fundamental, unique culture has become the backbone of land trusts' success: a culture of sharing, of respect for grassroots entrepreneurship, of ongoing learning and advancement, of producing tangible conservation results. With care, that culture will continue to foster success even as land trusts evolve to embrace ever- broader segments of society, and as new generations of leaders infuse the land trust movement with their energy, optimism, and forward-thinking.

Appendix A: Interview Questions

Note: The depth to which various questions were explored in a given interview depended on responses and situations of the interviewee.

Education and experiences

- What was your undergraduate major (and graduate degree, if applicable)?
- What job/volunteer experience did you have prior to first land trust job?
- What led to getting involved with land trusts?
- What has been your career path since?
- How have you obtained knowledge and skills needed in your job?
- What has motivated you to stay in LT field? How long do you think you'll continue? For emerging leaders: Where do you see yourself in 5-10 years?

Trends, challenges ahead for the LT movement and its leaders.

- Do you think today's emerging LT leaders view their role and that of their organizations differently from the ways senior leaders have viewed theirs?
- [How] have you seen the missions, roles and methods of land trusts evolve since you entered the field?
- What are the tools you use most frequently today in pursuit of your mission? [How] do you think that will change in the next decade?
- What additional or expanded roles do you see ahead for your land trust? For land trusts in general? Why is expansion and change important (if it is)?
- [How] do you think the concepts of land conservation, stewardship and perpetuity are changing? Does emphasis on conserving acres diminish as priorities shift to building community support and partnerships?
- Is mission creep a risk? Does it result in less on-the-ground land conservation?
- What are the biggest challenges you see for land trusts in the next decade?

Resources that will be needed to meet those challenges

- What kinds of skills do LT leaders most need today?
- What new skills will they need to meet challenges ahead?

Leadership transitions

- Does your organization have a succession plan? Should it have?
- To what extent do you think the experience of senior leaders is relevant to emerging leaders?
- [Senior leaders] What part of your experience do you think is most important to pass on to younger leaders? [Emerging leaders] What would you most like to learn from senior leaders?
- In what ways could senior leaders most productively share and transfer experiences and knowledge with younger leaders? Are there specific programs (e.g. mentoring,

internships, topic-specific networks, university programs, interactive web sites/webinars, peer exchanges and forums, formal teaching). Or does it just happen informally for those who seek that generational transfer?

Appendix B: Interviewees

Mark Ackelson: President Emeritus, Iowa Natural Heritage Foundation

Tom Bailey: Executive Director, Little Traverse Conservancy

Alina Bodke: Executive Director, Los Angeles Neighborhood Land Trust

Michele Byers: Executive Director, New Jersey Conservation Foundation

Story Clark: Principal Consultant, Conservation Consulting, and
Founder and CEO, TravelStory GPS, LLC

Meghan Dennison: Executive Director, Bayfield Regional Land Trust, Wisconsin

Jane Diffley: President/Forester, Society for the Protection of New Hampshire Forests

Jay Espy: Executive Director, The Elmina b. Sewall Foundation, Maine

Erik Glenn: Executive Director, Colorado Cattlemen's Agricultural Land Trust

Wendy Jackson: Executive Director, Freshwater Land Trust, Alabama

Tom Kay: Executive Director, Alachua Land Trust, Florida

Renee Kivikko: Director of Education, Land Trust Alliance

Glenn Lamb: Executive Director, Columbia Land Trust, Washington

Terri Lane: Executive Director, Northwest Arkansas Land Trust

Kris Larson: Executive Director, Minnesota Land Trust

Joselin Mathins: Executive Director, Teton Regional Land Trust, Idaho

Jeanie Nelson: CEO, The Land Trust for Tennessee

Ryan Owens: Executive Director, Monadnock Land Trust, New Hampshire

Dan Pike: Past President, Colorado Open Lands

Gavin Rickfels: Executive Director, Bitter Root Land Trust, Montana

Marc Smiley: Partner, Solid Ground Consulting

Peter Stein: Managing Director, The Lyme Timber Company

Jeanette Tuitele-Lewis: President and CEO, Big Sur Land Trust, California

Joe Whitworth: President, The Freshwater Trust, Oregon