The State of Conservation-Organization Led Stewardship in Illinois

Prepared by:

delta institute

With support from:

NATURAL LAND INSTITUTE
Conserving Land in Northern Illinois

openlands
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Heartlands Conservancy
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Prairie Land Conservancy
Prairie Preservation Society of Ogle County
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The Conservation Foundation
The Nature Conservancy
The Nature Institute
The Wetlands Initiative

Executive Summary

Land stewardship is defined as the practice of providing long-term maintenance, including the overhead costs associated with and administrative services needed, to ensure high-quality land is conserved in perpetuity. For many decades, the majority of land stewardship activities have been conducted by state, municipal, or federal government agencies. Roughly 50,000 acres of the 1.5 million total acres of conserved land in Illinois are owned by non-governmental conservation groups, also known as conservation land trusts. Traditionally, non-profit conservation organizations protected land, restored it, and then transferred it to government entities for long-term ownership. While this "protect, restore, transfer" model is still prominent, budgetary constraints across levels of government have undermined this model's viability or feasibility. Macro-economic and political issues have resulted in insufficient funding for governmental conservation agencies to purchase land from conservation land trusts. Furthermore, governmental conservation agencies may also lack sufficient funding to steward conservation lands that they've acquired. Because conservation organizations cannot assume they will be able to transfer land back to governmental agencies, such organizations are exploring strategies that would allow them to steward those lands in perpetuity.

This presents an opportunity for the conservation community to re-think the current model and develop innovative sustainable approaches to support land protection in the state. Yet, there is a dearth of state level data regarding the unmet need for land stewardship and tools that conservation organizations can use to address these challenges.

The project team, comprised of Delta Institute, Natural Land Institute (NLI), Jo Daviess Conservation Foundation (JDCF), Openlands, and Illinois Environmental Council (IEC), collaborated on an 18-month research project to understand and map out the current conditions of conservation organization-based stewardship in Illinois. The team's approach utilized interviews and surveys from conservation organizations throughout the state. Analysis was organized into five main categories: stewardship capacity, partnerships, funding and financing, policy, and behavioral and organizational dynamics. The key findings from the study included:

- Organizational size impacts the distribution of stewardship labor across staff positions revealing bottlenecks that diminish organizational capacity growth and causing inefficient utilization of existing expertise and resources.
- Volunteers play a critical role in implementing land stewardship, regardless the size of an organization
- Opportunities to develop innovative funding strategies exist, but remain untapped. Technical as well as cultural barriers need to be addressed to move them forward.

- The majority of partnerships, even though informal in nature, have staying power and bring value to organizations by providing shared resources and knowledge. However, access to and participation in such partnerships is uneven depending on geography and capacity constraints.
- Partnerships with decision makers and advocacy organizations need to be strengthened to build support for policies that protect land.
- Ecological, financial, and social resilience is a top priority for conservation organizations when it comes to long-term success. There is a need to cultivate the next generation of stewards that represent the community are and enabled to address current and future threats associated with climate change.

The conservation organizations interviewed by the project team communicated bold and hopeful visions for the future of stewardship in Illinois. They want to see a systematic strategy to improve land stewardship outcomes by building partnerships and increasing investment. They hope to protect land in a way that respects the cultural heritage of all people and meets the demands of stewarding Illinois' unique and diverse landscapes.

This report sheds light on how conservation organizations are carrying out land stewardship today, where they see major challenges and growth potential, and some best practices among this peer group. The intent of this study is to inform conservation professionals in Illinois and engage community leaders, politicians, volunteers, funders and other stakeholders on the substantial challenges the conservation community faces in protecting land in Illinois.

Background and introduction

Conservation professionals work in a resource constrained environment. Barriers to accelerating the scale and quality of land protection include the need for additional staff, skills and expertise, time and money, amongst others. Despite these barriers, conservation organizations and more specifically conservation land trusts have a long history of overcoming these challenges. The project team, comprised of conservation land trusts, researchers, and policy advocates, began investigating how conservation organizations might leverage available funding and financing opportunities to support their work, remaining mindful of the fact that conservation organizations are uniquely positioned to own and steward their land in perpetuity.

In previous work, the project team investigated various conservation finance and funding approaches directed at addressing long-term land stewardship needs, which are defined as the regular, long-term maintenance that conservation organizations should prepare for when they acquire land. Stewardship is often the hardest activity for these nonprofits to fund. Acquisition and initial restoration is often have more readily funded due to the desire of individuals to protect the natural environment from perceived immediate threats such as development pressure.

Resource constraints have been exacerbated in recent years as the State of Illinois and many municipalities continue to struggle financially. In the past, conservation organizations looked to state and local agencies for long-term management of protected parcels, conveying or selling them to government entities with the assumption that they would be well maintained. While this model is still a potential option public agencies are less likely to take on additional parcels because of their own, existing stewardship burden. Therefore, the project team postulated that if conservation organizations continue to acquire and restore land, they should also prepare for the increasing likelihood that they will be responsible for long-term management of that land.

In a report titled *Preparing for Long-Term Stewardship: A Dual Approach* , the project team proposed various approaches for land stewardship in Illinois. The report presented financing opportunities and illustrated a potential funding concept. This concept utilized a "dual approach" that combined stewardship cooperatives and working lands cooperatives to create a long-term management framework as seen in Figure 1.

Figure 1: *Dual Approach Framework Concept Diagram*

Advancing this work required a deeper understanding of conservation organizations' current capacity as well as the challenges associated with stewardship, which this report examines. The project team also conducted a pilot project focused on establishing a working lands investment initiative. The results of the pilot project are documented in a separate case study. These findings will help inform not only conservation professionals in Illinois, but also community leaders, politicians, volunteers, funders, and other stakeholders on the substantial environmental challenges the conservation community faces in protecting and maintaining land in perpetuity.

This report briefly describes findings related to five critical issue areas: stewardship capacity, partnerships, funding and financing, policy, and behavioral and organizational dynamics. The appendices include the Land Trust Survey, Interview Guide, Coding Thematic Categories, description of the methodology utilized in data collection and analysis, as well as additional supporting information used in the study.

Of the approximately 45 non-profit land conservation organizations in the state, the team collected written surveys from 24 of these organizations and conducted 31 organizational interviews. This accounted for 94 percent of the acres owned by non-profit conservation organizations as documented in I-View, a database of protected lands in Illinois (http://prairiestateconservation.org/i-view/). Of that total acreage, 2,650 acres were categorized as agricultural lands, 236 acres were recreational, and 110 acres were used for buildings and structures, while the remaining 41,144 acres were natural habitat. A detailed breakdown of habitat types is shown in Figure 2.

Survey responses from the 24 non-profit conservation organizations (23 statewide or local, and one national) were categorized as small, medium, or large organizations based on the acreage of land the organization has under its management. Responses were received from 10 small (up to 500 acres), nine medium (501 to 2,000 acres), and five large (2,001 acres or more) organizations. The survey data was cross-analyzed with data from over 60 hours of interviews from 31 local and state-wide conservation organizations.

Natural Land Type	Acres	Number of Conservation Organizations Managing this Type of Natural Land
Forest	14,449	22
Wetlands	8,904	21
Prairie	7,942	21
Lake, Ponds, Streams	5,201	15
Savanna	3,265	17
Tillable	1,684	10
Other Natural Habitat	807	8
Other Agricultural Land	608	5
Eurasian Grassland	575	5
Trail Corridors	198	8
Hayfield	110	5
Buildings and Structures	110	9
Parkland (mowed areas)	30	3
Other Recreational Land	8	2

Figure 2: *Description of acres assessed by project.*

Stewardship Capacity

Based on survey responses, the research identified that 75 percent of all the land protected in Illinois by conservation land trusts was later transferred to a state or local agency. However, only 16 percent of those transfers from conservation land trusts to governmental agencies have taken place in the last 10 years, suggesting a shift in the organizations responsible for the long-term stewardship of the land. This suggests that non-profit conservation organizations are acquiring and stewarding land as the long-term owners of that land more frequently. Conversely, non-profit conservation organizations are acquiring and subsequently transferring land to governmental agencies less often than in years past.

The first section of the study focused on stewardship capacity; the ability, resources, and time needed to fully manage over 40,000 acres of land across a variety of natural habitat types as shown in Figure 2. The study also looked at roles different staff play in stewardship planning and implementation. This portion of the study sought to identify best practices as well as inefficiencies in how current capacity is deployed. Most organizations that were interviewed expressed a desire to improve their stewardship capacity through additional staff, volunteers, or both. Only two of the 31 organizations interviewed indicated that they were able to fully meet their stewardship targets.

The analysis within this section indicated limitations associated with the current capacity at an aggregate level for the conservation organizations in Illinois. The section examined which staff or volunteer positions are doing the work, the cost of these activities, and opportunities for growing stewardship capacity. The results of this analysis show the breadth of approaches among conservation land trusts implementing stewardship and highlight opportunities to create efficiencies and better utilize existing resources.

The Stewardship Workforce

The surveyed organizations accomplish stewardship activities through a diversity of methods implemented across a variety of staff positions. The majority of organizations surveyed are seeking to have, or already have, at least one full-time, paid staff person dedicated to stewardship. Organizations that have paid staff use these staff to directly implement stewardship activities and also to manage a larger pool of volunteers and contractors, which are critical to stewardship implementation. Volunteers and contractors were the two most frequently reported positions involved in stewardship implementation based on survey results.

Figure 3 summarizes these results. The survey asked non-profit conservation organizations to report which positions are involved with stewardship activities at their organizations. Paid stewardship program staff and volunteers, on average, spend the most hours involved in stewardship work.

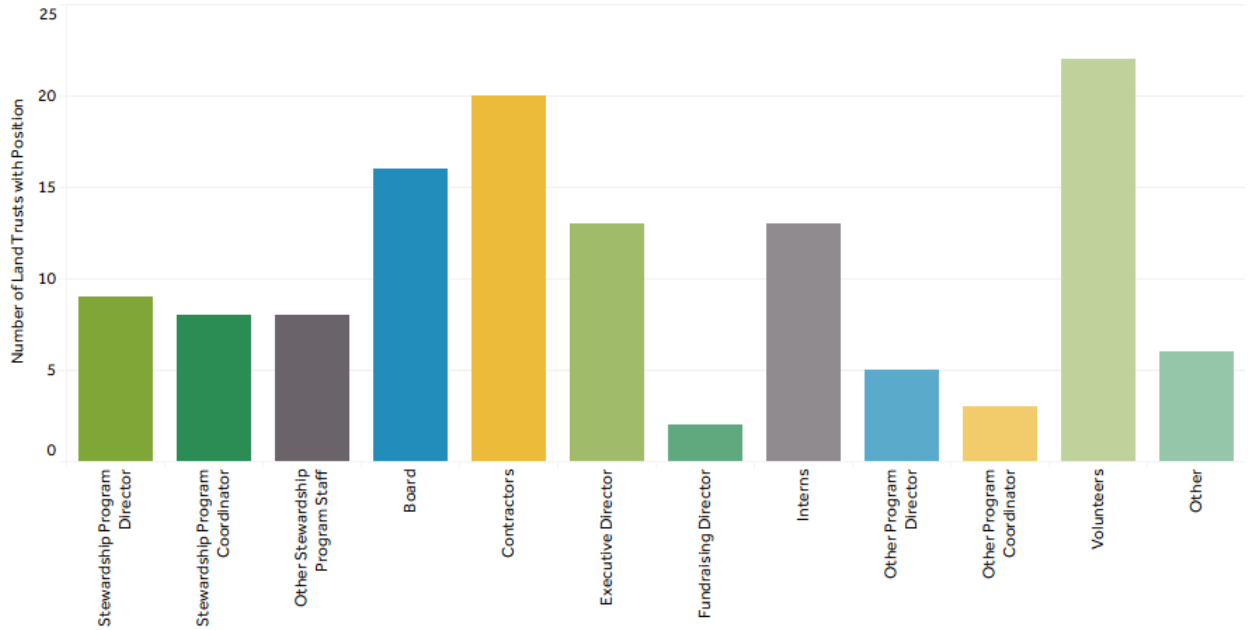

Figure 3: *Number of organizations reporting identified staff positions involved in stewardship activities.*

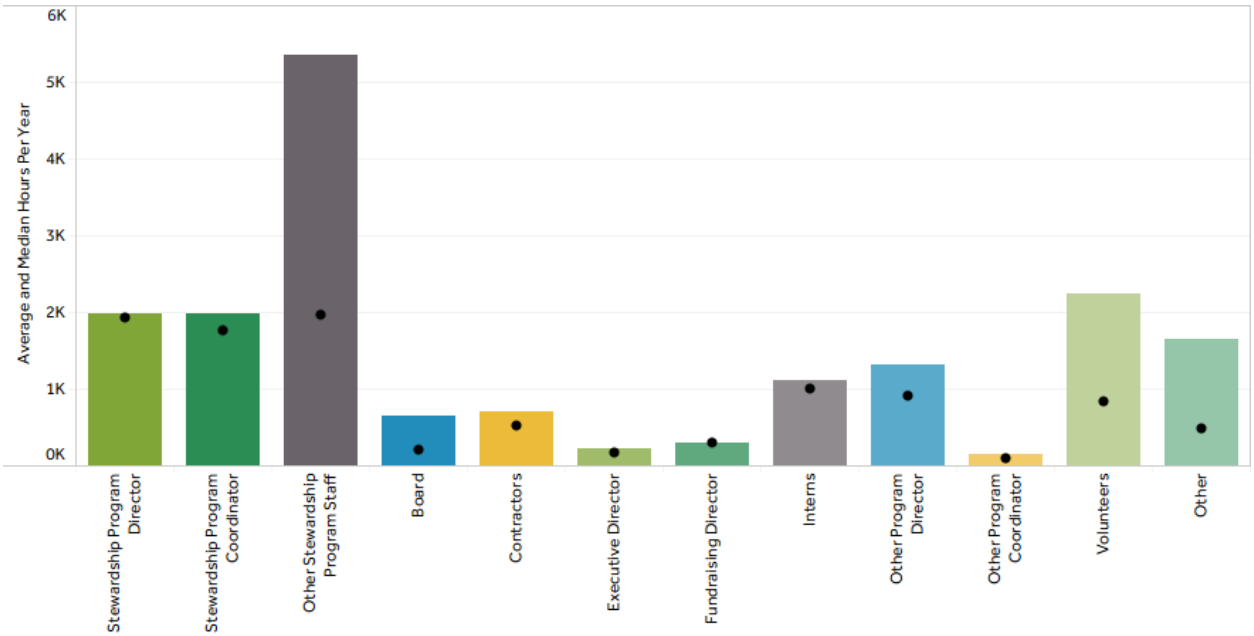

Figure 4: *Average hours per year spent on stewardship activities for different position types. Median hours per year is indicated by black dots (●). Average and median is based on the number of organizations that have such positions. Not all organizations that responded to the survey.*

However, less than half of surveyed organizations reported having a dedicated, stewardship-focused, paid position. This reveals a large resource gap and an area ripe for growing capacity. Figure 4 shows how many hours per year (average and median) each position type dedicates to stewardship. The hours are reported as totals per organization, not per individual (e.g. most organizations have multiple volunteers or board members).

The distribution of position types and hours spent on stewardship also varied based on organizational size (Figure 5). Land trusts with larger land holdings reported a greater percentage of the stewardship work being conducted by full-time, mid-level staffers. Specifically, these land trusts reported utilizing stewardship directors, coordinators, or other program directors. Mid-sized land trusts have a more evenly divided workload among volunteers and program staff.

Smaller organizations reported a heavier reliance on volunteers for stewardship work on the ground. Data suggests that small land trusts do not typically support a junior-level stewardship position, such as a coordinator. Despite variations across size categories, organizations reported approximately 1 full-time equivalent (FTE) of hours contributed by volunteers.

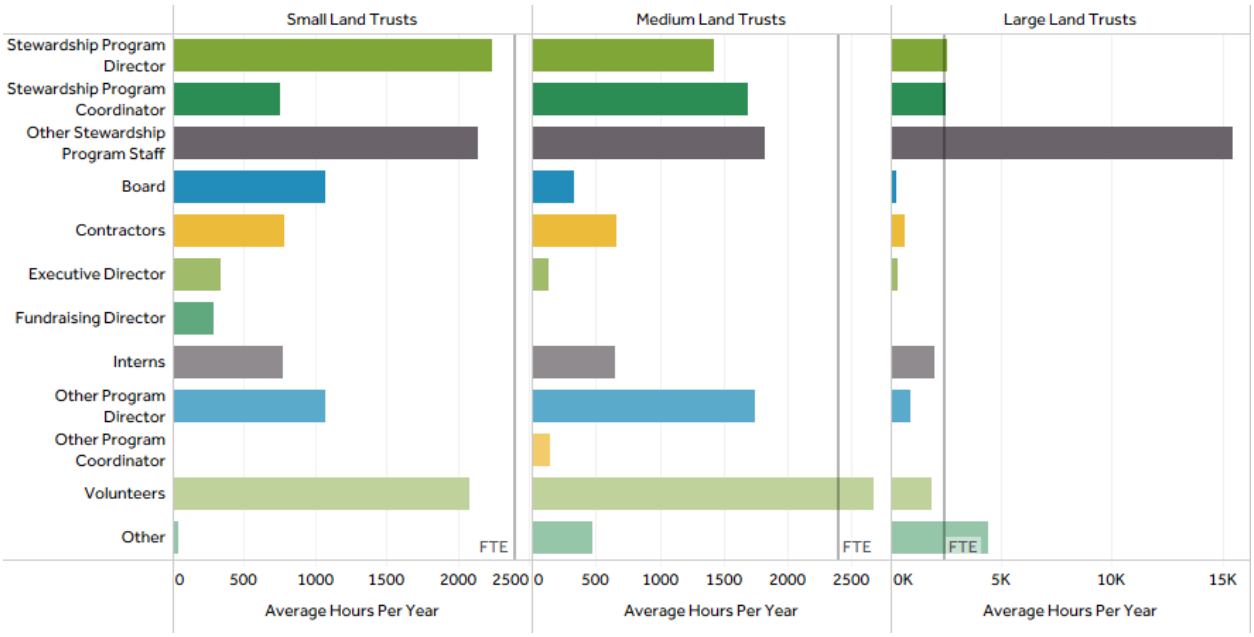

Figure 5: *Stewardship hours for different position types based on organization size.*

Each organization was asked to report (via survey) the main roles of each position involved in the organization's stewardship activities. Those results are summarized in Figure 6. While some position types assume distinct roles related to stewardship (e.g. priority setting, fundraising, implementation, etc.), others seem to participate in a variety of, if not all stewardship activities on a regular basis. This analysis showed that executive directors and board members often play a key role in on-the-ground stewardship as well as in the administrative aspects of stewardship. Board members and executive directors were most likely to be involved in on-the-ground stewardship at smaller organizations however, interviewees acknowledged or suggested that fundraising and strategy development should be higher in priority for these positions.

Notably, contractors are primarily used for implementing stewardship activities and filling a secondary role in developing management plans. When asked about this, organizations cited the need for highly-skilled and specialized work as the primary reason for hiring contractors, implying that these specialized skill sets are often not available in-house. Herbicide application was a commonly referenced activity for which a contractor was hired due to the limited number of on-site staff or volunteers with herbicide applicator licenses. Another factor is that grant programs often prohibit grant funds from being expended on in-house employees, thus requiring the organization to hire contractors to do stewardship activities that would have otherwise been kept in-house.

	Priority Setting	Fundraising	Developing Management Plans	Implementing Stewardship Activities	Coordinating Contractors & Stewardship Staff	Coordinating Volunteers
Board	14	13	10	14	9	12
Contractors	-	-	5	19	1	1
Executive Directors	13	13	8	5	6	5
Fundraising Director	1	2	-	-	-	1
Interns	-	-	1	12	1	1
Other	1	1	2	5	2	3
Other Program Coordinators	-	1	2	3	2	2
Other Program Director	4	3	3	3	4	4
Other Stewardship Program Staff	-	-	4	8	1	3
Stewardship Program Coordinator	3	1	7	8	6	7
Stewardship Program Director	8	3	8	8	9	7
Volunteers	1	3	3	18	2	7

1-5 organizations
6-10 organizations
11 or more organizations

***Figure 6**: Stewardship activities based on position type, with the number representing how many organizations report that particular position being involved in a particular activity.*

The Role of Governing Boards in Stewardship

Survey results suggest that board members are involved in a wide array of operational and programmatic stewardship activities that exceed fiduciary and governance roles. On average, board members contribute 643 hours per year, with a median of 200 hours per year, spent conducting stewardship activities (Figure 4). The involvement of a board is dependent on the size and maturity of the organization, with small conservation organizations documenting about three times more hours than boards at mid-sized or large organizations (Figure 5). This finding suggests that as organizations grow, they find greater efficiencies in implementing stewardship activities by utilizing other means, or it may suggest that a highly engaged "working board" is needed to keep smaller organizations viable.

With this information in mind, it is important to consider the question "What is the best use of a board's limited time?" Based upon our interviews, conservation practitioners emphasized the importance of board members in fundraising and priority setting as opposed to direct stewardship implementation. Therefore, it may make sense to work directly with boards and staff within organizations to re-prioritize board members' time where possible to improve the efficacy of these roles with respect to development and governance.

The Importance of Volunteers

Organizations, on average, achieve more than 2,242 hours of stewardship support per year from volunteers, which equates to an additional full-time employee. This volunteer contribution is critical to the success of conservation organizations and has long been a component of land stewardship work. Further capacity analysis suggests that across conservation organizations, there is nearly a one-to-one ratio, on average, of volunteer hours to staff hours engaged in stewardship activities (Figure 7). This means that 50 percent of all stewardship hours in the state of Illinois are conducted by volunteers. The data also shows that on average, for approximately every 16 volunteers working with conservation organizations, there is one staff member.

Examining the volunteer-to-staff-capacity ratios is useful in understanding volunteer recruitment and engagement. It provides an organization-wide snapshot of volunteers' contributions to stewardship capacity. There is no observed correlation between volunteer to staff capacity ratio and quantity of managed land. The results suggest that conservation organizations employ different volunteer strategies. High hour ratios suggest that there is robust engagement with individual volunteers who contribute many hours to the organization. On the other hand, high ratios suggest effective recruitment of volunteers as the ratio indicates that many individuals get involved with the organization.

Further analysis would be needed to determine those factors that significantly influence volunteer engagement. Interviews suggest that volunteer program structure may depend on an organization's size, location, habitat type in need of stewardship, and other factors. Many organizations leverage existing relationships and organizational infrastructure and combine multiple engagement strategies to cultivate a strong volunteer corps.

During discussions in interviews, organizations identified community "champions" as key components for robust volunteer programs. These highly engaged, active volunteers, whether they serve on the board or not, can help organize work days, bring out other volunteers, recruit new volunteers, serve as site stewards, and track hours. In the interviews, respondents mentioned the value of these highly committed volunteers in training other volunteers with emerging skill development (e.g. school groups or other social clubs). By identifying these strong leaders and nurturing them, organizations are able to increase their stewardship capacity.

On the other hand, interviews revealed that engaging volunteers is a perennial challenge and all organizations would benefit from bringing in additional capacity through their volunteer programs, focusing on cultivating the next generation of conservationists.

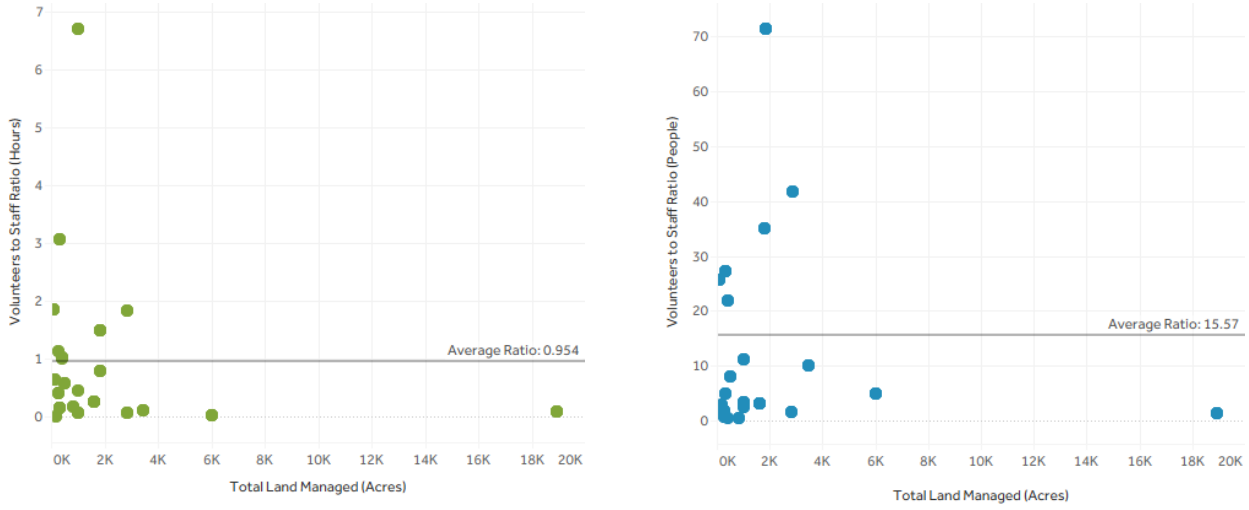

Figure 7: *Each symbol represents an organization's volunteer to staff ratio as a function of acres of land managed, in terms of hours (left). Average volunteer to staff ratios are also indicated on the graphs (right). All staff time is summed together (not weighted by position type).*

Based on the responses, successful strategies for volunteer engagement included:

- **To increase knowledge**: Periodically holding skill-based trainings for groups of volunteers to enhance overall capacity.
- **To increase numbers:** Connecting directly with "affiliate organizations" to share volunteer opportunities and to collaborate where possible.
- **To build partnerships:** Be clear about identifying the mutual benefits for participants.
- **To keep them:** Make sure you are checking in, being attentive, and creating fun and engaging activities in addition to manual labor.

Labor Costs

It is important to consider the cost of the stewardship work currently, including the in-kind contributions made by volunteers and others. The project team projected these costs by assigning an hourly rate to each position type. The hourly rates used in the analysis are based on Illinois Department of Human Services data, Bureau of Labor Statistics data and 2017 Land Trust Salaries and Benefits survey (see Appendix D for details). Combining all paid stewardship capacity positions suggests an average cost of $50 per acre in labor costs and 2.2 hours per acre of staff time. Board and volunteers contribute approximately $7.20 per acre in in-kind value to organizations. In addition, the cost of labor for stewardship program directors is $9.2 per acre.

Data suggests that as land trusts acquire more land, the investment into mid-level stewardship positions is key as they spend the most time implementing stewardship and that's where most capacity is expanded as acreage increases. When looking at labor costs by size of organization (Figure 8), the project team found that large land trusts outspend all others by a factor of about three. Large land trusts spend about $640,000 on stewardship labor, whereas labor costs for medium and small land trusts are approximately $215,000 annually.

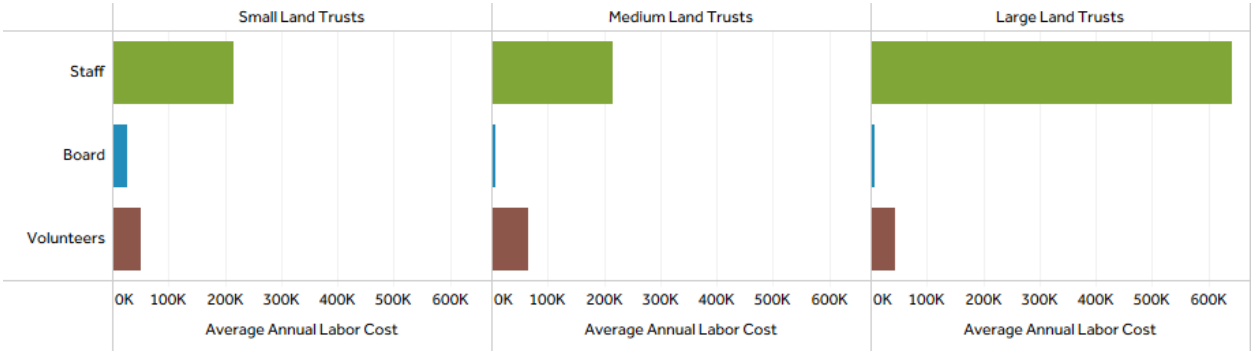

Figure 8: *Annual labor costs for staff and in-kind labor contribution from board and volunteers for stewardship activities based on organization size*

Results indicate that medium-sized land trusts are managing more acres than small land trusts while expanding the same amount in labor costs. This may indicate that medium-size land trusts are utilizing resources more efficiently; or, it could indicate that mid-sized land trusts are not increasing their stewardship capacity as these organizations acquire more land, thus keeping their stewardship labor expenses relatively flat.

The project team suggests the latter is likely, as small and medium-size organizations indicated that limited funding hindered their ability to bring on additional stewardship staff capacity. Furthermore, the data suggests that there is a steep cost curve associated with stewarding more than 2,000 acres due to the use of contractors, multiple staff, and increased stewardship standards (e.g. for public recreation.) This could be an additional reason why small and mid-size conservation organizations are hesitant to grow their capacity.

Management Activities

Furthermore, the project team assessed stewardship capacity by examining how frequently conservation organizations implement typical stewardship activities such as site monitoring, invasive control, burns, updating management plans, managing vegetation, grazing, hunting, or controlling for nuisance wildlife. The survey also included questions about implementation frequency for general management activities such as supplies maintenance and replacement, equipment maintenance and replacement, as well as public infrastructure maintenance and replacement.

The results suggest that conservation organizations largely implement stewardship activities at the recommended frequency (Figure 9). However, information about implementation frequency does not fully characterize the gap between actual and desired level of implementation. Interviews revealed, for example, that while conducting invasive species control annually, conservation organizations lack capacity to do it on all the land they manage. A more in-depth analysis is needed to quantify the additional capacity needed to achieve the desired level of implementation - one that takes into account acreage, habitat type, location, and a variety of other factors.

Activity	Implementation Frequency Reported	Recommended Practice
Site monitoring	Annual	Annual
Invasive control	Annual	Annual
Controlled burns	Every 1-3 years	Every 3-5 years
Update management plan	Every 2-6 years	Every 3-5 years
Vegetation management	3-4 years for forest/lake and ponds 2-3 years for prairie/savanna/wetland/grassland/trails	5-10 years for forests 3-5 years for prairie/wetlands
Grazing	Rarely occurs, annual when applicable	Annual
Nuisance wildlife control	Rarely occurs, annual when applicable	Annual until population is at the desired level
Hunting	Annual, when applicable	

Figure 9: *Frequency of stewardship activities, typical reported and recommended.*

Partnerships

Respondents were asked to share information about impactful organizational partnerships within the last 10 years of their organization. They emphasized the importance of both formal and informal relationships in completing work on the ground. These partnerships are seen as ways to consolidate finite resources, leverage funding, and implement programs that would not otherwise be achievable.

The many cited benefits of partnerships are increased access to money, volunteers, trainings, specialized expertise, and supplies. An example of this is the way in which many organizations throughout the state have informal partnerships with the Illinois Nature Preserves Commission and receive herbicide and other supplies in exchange for management of nature preserves throughout the state.

Partnership Structure and Duration

Figure 10 shows the number of partnerships in the last 10 years as reported by the survey respondents and the types of organizations that are partnering with the survey respondents. The majority of the partnerships reported in the survey, 65 out of 96, are informal.

The majority of informal partnerships are with volunteer groups, while partnerships with local/state government, service cooperatives, and other land trusts make up the next most frequently reported informal partnerships. On the other hand, partnerships with the federal government, which also occur at a similar level, tends to be formal in nature.

When asked why many organizations engage in more informal partnerships, interviewees often cited personal connections between organizations as well as the additional administrative steps needed for formal partnerships, which are viewed as burdensome. Partners expressed the need of formal partnerships to attract a wider set of partners, including government partners, and the way in which formal partnerships were more effective in holding groups accountable to each other.

Figure 11 shows that the conservation community has long utilized partnership models and that they build enduring relationships. When discussing this long history of partnerships, organizations mentioned the need to leverage other organizational skills, reach new constituents, and creatively fundraise.

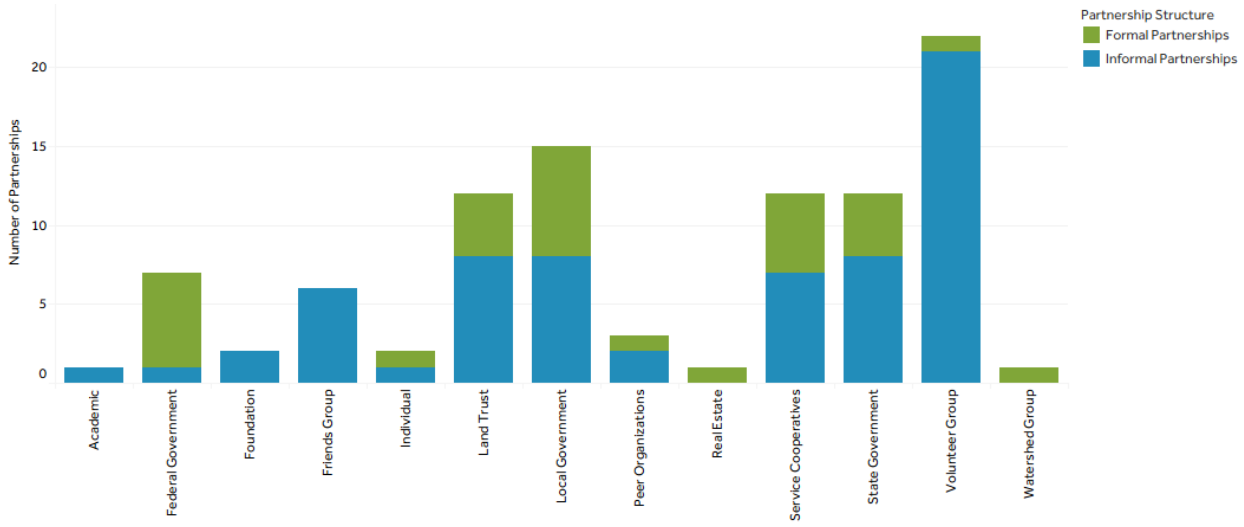

Figure 10: *Formal and informal partnerships, by partner organization type.*

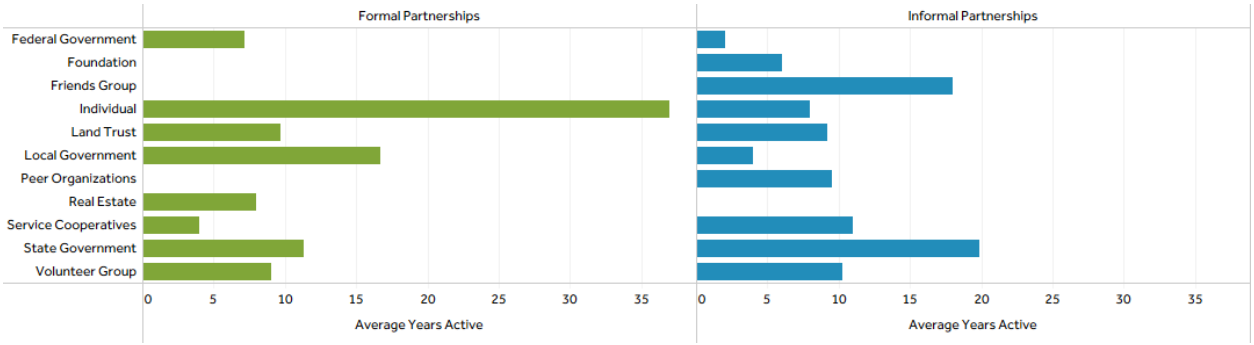

Figure 11: *Partnership length (in years) reported, broken down by type of partner organization.*

Partnership Activities

Data reported by participants (Figure 12) shows trends about the types of activities that are most common with key partner types. 129 out of 203 total activities reported were conducted as part of informal partnerships, reinforcing the finding that informal partnerships dominate in this sector. Volunteer groups primarily share volunteers and sometimes sharing data and equipment. Among public sector partnerships, state agencies lean more toward data and equipment sharing, whereas local governments are often partners for joint site management activities and sharing of volunteers; though local/state agencies participate in all activities to some degree. Land trusts also partner with service cooperatives on a variety of activities. Data, equipment, and volunteer sharing are slightly more prevalent than grant writing or joint site management in these arrangements.

Further analysis shows that 15 partnerships involved four or five activities between partners, 44 partnerships involved two to three activities, while 35 partnerships involved only one activity. This correlates well with comments made by interviewees who stressed the importance of a shared goal. By having a narrowly defined goal, partnerships might be more likely to endure as expectations are more likely to be well defined.

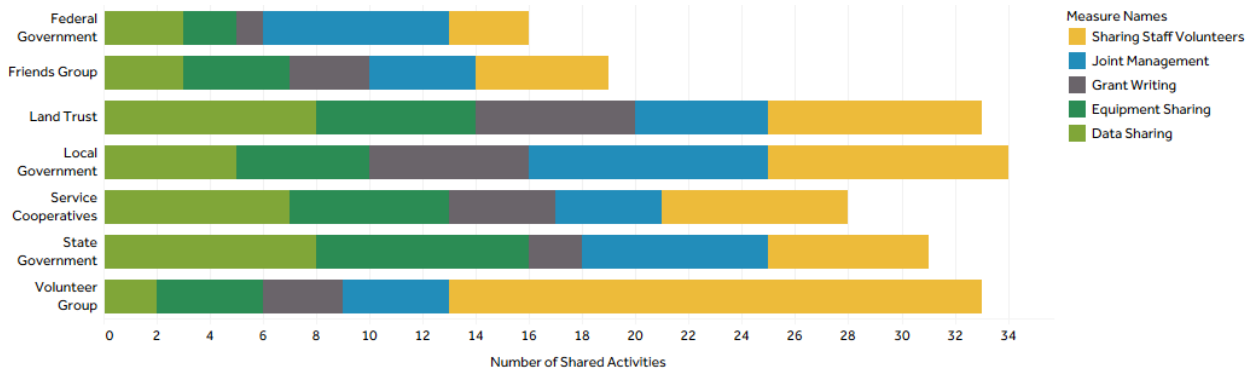

Figure 12: *Partnership Activities*

Measuring Connectivity

In addition to characterizing the types of partnerships and activities undertaken by the partner organizations, the project team examined the structure of the network of organizations from which conservation organizations form partnerships.

Understanding the structure of the network can inform how the network functions, whether particular organizations may act as conveners or bottlenecks in diffusing information, if there are sub-groups within the network, and what strategies can be helpful in leveraging network connections to improve conservation outcomes in Illinois. Understanding connections between partners and how to leverage partner resources is critical in increasing stewardship capacity across the state.

Utilizing the web-based network analysis tool Kumu, the research team looked at the partnership network of the conservation organizations participating in this study, focusing on three basic network analysis metrics: degree (the number of connections each network member has), closeness (the distance each network member is from all other members), and betweenness (how many times a network member lies on the shortest path between two other members). Figure 13 shows a snapshot of the network diagram and associated analysis that can be explored in more detail within the interactive Kumu map.

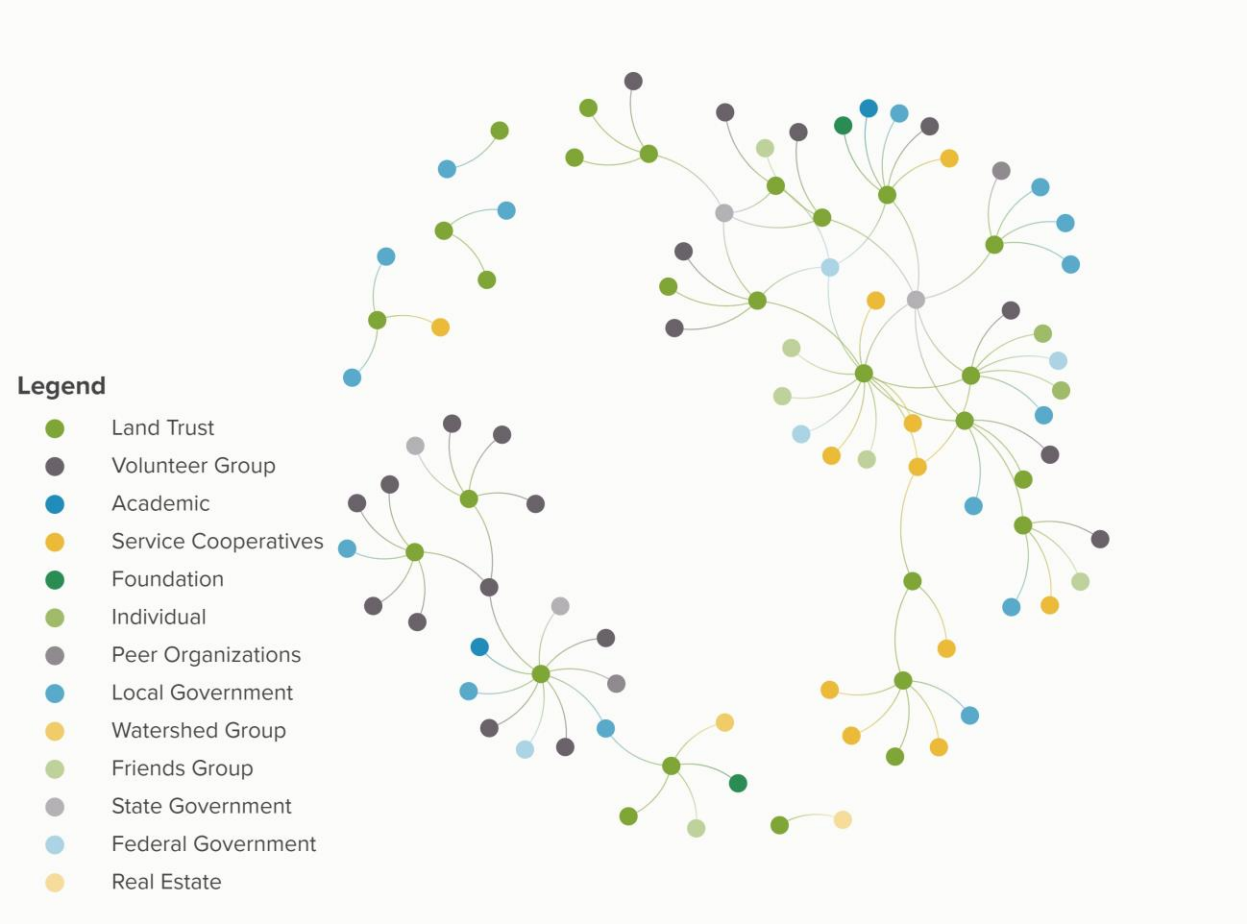

Figure 13: *A snapshot of the conservation partner network. To view and explore further, please visit* [this link.]

Looking at network degree, i.e. the number of connections each organization has, top local hubs within the network can be identified. These include: Illinois Department of Natural Resources (IDNR), ParkLands Foundation, Grand Prairie Friends, Friends of the Kankakee, The Wetlands Initiative, Franklin Creek Conservation Association, Barrington Area Conservation Trust, Jo Daviess Conservation Foundation, Lake Forest Open Lands Association, and The Nature Conservancy.

These organizations were often mentioned during interviews as key active participants and models of community builders in the state. While many within the state express concern around partnering

with IDNR due to lack of resources within the agency, the network map suggests that IDNR remains one of the key connectors within the conservation community in the state. Though these organizations have a large number of connections locally, they are aren't necessarily well connected to the wider statewide network.
Another useful measure in understanding the network is closeness, which measures the distance between each member to all other members. In general, organizations with high closeness can spread information to the rest of the network most easily and usually have high visibility into what is happening across the network.

The top ten nodes within this network are ParkLands Foundation, CLIFFTOP, Grand Prairie Friends, Friends of the Kankakee, The Wetlands Initiative, Franklin Creek Conservation Association, The Nature Conservancy, IDNR, United States Fish and Wildlife Service (USFWS), and Middle Rock Conservation Partners.

Betweenness measures how many times a network member is located on the shortest path between two other partners. In general, organizations with high betweenness have more control over the flow of information and act as key bridges within the network. They can also be potential single points of failure, i.e. bottlenecks.

The top 10 brokers in the network are Grand Prairie Friends, Friends of the Kankakee, The Wetlands Initiative, Franklin Creek Conservation Association, Jo Daviess Conservation Foundation, The Nature Conservancy, Natural Land Institute, IDNR, Middle Rock Conservation Partners, and the Illinois Nature Preserve Commission.

Several entities appear to have substantial representation in the network when evaluating network metrics and are acting as local hubs and connectors between partners. These tend to be state agencies or large organizations. The network diagram also shows that there are numerous organizations that have almost no connections to these players or to other conservation organizations. This suggests that future interventions to leverage partnerships and collaborations should ensure that outreach efforts target organizations that have not played an active role in the wider network and have fewer resources accessible to them.

The segmentation of the network is further demonstrated by the network community analysis showing 11 communities (groups of organizations that are more likely to interact with each other more often than interacting with others) with at least three members. The data also suggested that three land trusts are not closely interacting with any other members of the network as the algorithm didn't link them to any communities.

The preliminary network analysis is based upon survey responses, i.e. self-reported data. As such, the team expects that gaps remain in its understanding of the network structure and its role in enabling implementation of land stewardship among conservation organizations in Illinois. While the team will continue to refine analysis and its understanding of the conservation network, the data suggests that potential for building stewardship capacity is not uniform across the state.

Strategies for collaboration should reach beyond conservation organizations that are already major players in the network.

Partnership Pitfalls

The most commonly discussed partnership issue brought forth during the interviews was misalignment of the vision and goals between partners. Partnerships require a great deal of trust and it is necessary for mutual commitment to be agreed upon and consistent.

Some organizations felt that it was just easier and more straightforward to work alone. They had engaged in partnerships that ended up requiring more administrative work than providing benefit to their organizations and as such were subsequently less likely to engage in additional partnerships.

Another issue cited with partnerships regarded contracting and shared service agreements, especially in partnerships that included multiple types of organizations such as state, local, and non-profit organizations. Organizations often have established processes and a large partnership might not be easily incorporated into existing processes.

Proposal writing and associated budgets were often referenced as a barrier to establishing more partnerships. There is the potential for disagreements around how requested funds are used, organizational compensation, and how organizations value different types of work.

Some partnerships, especially more formal ones, might exist because of a specific funding source. When funding is not renewed, partnerships often struggle to continue. Conservation 2000 (C2000), a program which was designed to take a holistic, long-term approach to protecting and managing natural resources in Illinois and provided funding for regional partnerships, is a well-known example in Illinois about how partnerships can fall apart without funding.

Funding

Conservation organizations that were interviewed fell into two categories: those with dedicated stewardship budgets and those who utilized unrestricted funds for stewardship when needed and/or available.

Those organizations that had dedicated stewardship funds have found more success in fundraising for stewardship, often by requiring that all new land acquisitions be accompanied by new funds for stewardship, or through financing arrangements such as revenue from lease arrangements or mitigation funding. This commitment to long-term management at times can prevent new land protection projects from reaching completion but guarantees the organizations' long-term viability by not overburdening the organization with unfunded stewardship obligations. Yet, it remains challenging to budget and plan for capital expenses associated with stewardship such as new vehicles or other large equipment.

Those organizations without dedicated stewardship funds represented about 75 percent of those interviewed. These organizations found it challenging to plan ahead for stewardship. They were often smaller organizations with limited staff and fundraising opportunities. Given limited reach within networks, there is a struggle to raise money for stewardship activities.

Current Funding

Land trusts and other conservation organizations in Illinois use a variety of funding sources to support their stewardship activities. Survey respondents commonly mentioned traditional sources of stewardship funding such as foundation grants. There were also a number of more innovative collaborative funding sources reported such as wetlands mitigation banking or revenue from working lands leases. A summary of the reported funding sources is shown in Figure 14.

As demonstrated by the survey results (see Figure 6), conservation land trust professionals perform a variety a tasks on a day-to-day basis and are expected to not only conduct stewardship activities, but also build financial capacity for the organization. Many organizations lack the time and resources necessary in identifying and soliciting individual donors.

A growing trend in giving throughout the country suggests that while the average age of donors increases, the younger generations are giving less. For example, a recently conducted internal survey implemented by a conservation land trust found that major donors contributing over $2,500 are 70 years or older and are frequent volunteers for the organization. With this in mind, the conservation community has a challenge ahead as it attempts to engage the next generation of donors.

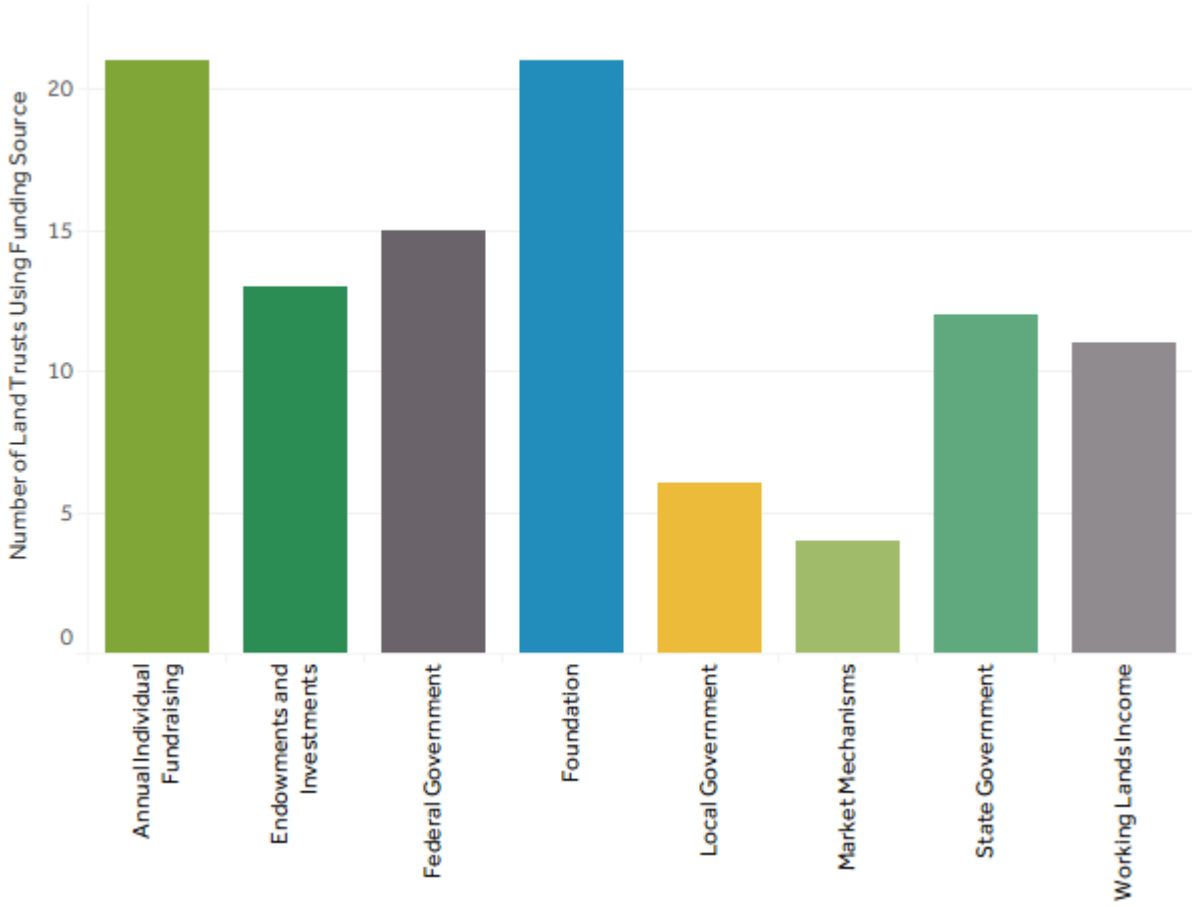

***Figure 14**: Funding sources utilized by land trusts, by type.*

Connecting the stewardship work to personal experiences is key when it comes to donor cultivation. Donors tend to give to organizations when there is a personal or emotional connection tied to the mission. Donors think of their connection to land stewardship and how their donations leave a lasting legacy.

According to interviewees, donors also often cite education as a primary interest. A number of organizations reported that directly connecting educational opportunities with stewardship work raised the profile of stewardship, a model that might be replicable by conservation organizations in Illinois. Further, engaging donors through educational activities helps them learn more about the conservation work of the organization while allowing them the chance to get a firsthand look at the impact their gift is having.

Foundation Giving

Twenty-one of the 24 organizations surveyed reported utilizing foundation funding for stewardship. Interviewees identified capacity constraints that are creating a system where smaller organizations are prevented from receiving grant funding, primarily from foundations, because they cannot prepare "professional" applications. One organization suggested a different process for smaller organizations that includes additional support for grant applicants to navigate the grant application process.

A synthesis of the interview discussions suggests that organizations with strong administrative capacity are better positioned to take on the burden of developing a grant application, as the requirements consume staff time that might otherwise be spent on the implementation of stewardship activities.

To counteract some of these constraints, organizations need to make the case to funders that administrative costs should be included when budgeting for stewardship. To that end, many organizations have begun tracking costs associated with stewardship activities that go beyond planning and implementation, potentially including those as overhead requirements within their larger stewardship budget.

Government Programs

Conservation organizations rely on leveraging federal and state programs to assist with organizational and stewardship activities, and are a vital source of funding for land and natural resource conservation improvements. Most organizations reported applying for or receiving government funds for mission-related activities. Below is a snapshot of federal and state programs that organizations leveraged.

Of the federal programs, United States Department of Agriculture (USDA) programs were most commonly used (12), followed by the United States Fish and Wildlife Service (USFWS) (5). Others included the Great Lakes Restoration Initiative, U.S. Forest Service, the National Fish and Wildlife Foundation, and the North American Wetland Conservation Act "small grants" program.

State programs included C2000, Coastal Management, Illinois Environmental Protection Agency 319 Grants Program, Illinois Nature Preserves Commission, State Wildlife Grants, Illinois Recreational Access Program, and other Illinois Department of Natural Resources programs.

Endowments and Investments

When preparing for the long-term, endowments remain one of the most consistent and safe choices for funding land stewardship. Approximately 60 percent of surveyed organizations reported having an endowment. Figure 15 shows the number of land trusts with endowments and how they are used.

While the majority of board-designated endowment funds were used for general operating expenses (which may include annual stewardship expenses), the majority of donor-designated endowment funds were for site specific projects—likely at the behest of the donor. Site-specific, donor-designated endowment funds are used to support the stewardship activities on that site. In the interviews, respondents typically mentioned drawing 4 percent from their endowments each year with a strong desire to grow them when possible.

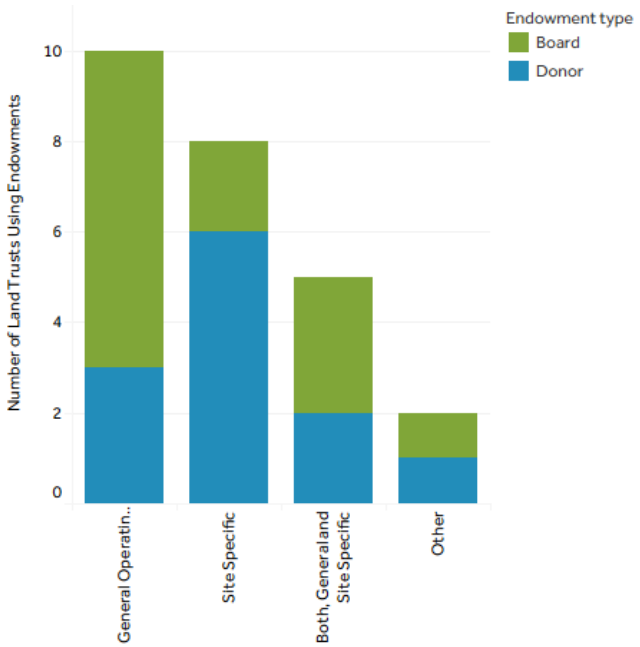

Figure 15: *Endowments used by land trusts to fund conservation, by type*

Organizations varied on how these funds were managed. Some utilize a paid financial advisor; others utilize a board committee if the expertise is available in-house; while others have partnerships with community foundations who manage the funds. Interview results suggest that there is a knowledge gap among organizational directors regarding the benefits and risks of various endowment management approaches. This may be an opportunity among the conservation community for shared learning, either through PSCC or an alternative forum.

Market Mechanisms

In addition to leveraging government grants and endowments, conservation organizations also utilize market mechanisms to finance conservation. The two most commonly utilized market mechanisms identified in the study include real estate sales and mitigation funds.

Real estate sales are most often deployed as a stewardship funding strategy where limited development is allowed on the land in exchange for a much larger effort to protect adjacent natural areas. The agreement usually includes long-term fees associated with the management of the natural areas. This funding strategy has been particularly effective in areas of significant land development pressure, such as in the counties surrounding and within the Chicago metropolitan area. Organizations who champion this strategy emphasize how it allows conservation organizations to protect most important natural habitat while compelling developers to build conservation practices into their business plans.

Mitigation banking has garnered increasing attention in Illinois in recent years. This mechanism applies when a regulated entity needs to offset environmental damage resulting from their activities. If their properties meet the criteria needed to mitigate the damage, land trusts can participate in the transaction.

When considering mitigation projects, practitioners reflected on the fact that such projects can be complex and require a particular skill set to implement. On the other hand, some respondents expressed concern about mitigation banking as a financing mechanism due to mission misalignment or a perception of "enabling" habitat destruction.

Considering both of these mechanisms, practitioners mentioned the need for outside help and expertise, whether it be an accountant, private banker, or market expert. These advisors can be critical to ensuring the success of market based approaches.

While other market based financing strategies for stewardship exist (e.g. ecosystem service markets), conservation practitioners interviewed did not mention existing efforts or a strong desire to pursue them for funding stewardship activities.

Working Lands

In the context of the project team's survey, leases were the primary source of revenue for working lands, with 11 respondents reporting that they receive working lands income. In Illinois, these working lands are primarily agricultural. In some cases, organizations lease their agricultural lands in the short-term while they raise funds to restore these agricultural areas, while others have determined that they will keep their farmland in working production as the income it generates is useful to the organization in more impactful ways. This presents an opportunity to explore how working lands can be utilized to finance conservation of natural lands while ensuring that farmland is managed with a focus on conservation.

The largest concern among organizations was related to acquisition of farmland. Yet, as farmers retire, land will be changing hands in the coming decade. Conservation organizations may be able to position themselves as partners with farmers in protecting natural resources. The conservation community, along with this project team is currently building infrastructure to enable land trusts to utilize working lands income as a financing strategy for stewardship. A pilot project led by the Natural Land Institute is focused on establishing a working lands investment initiative and the results of the pilot project are documented in a separate case study.

Policy

Conservation organizations throughout the state expressed a desire to engage more deeply and effectively with policy makers to ensure that natural land protection and stewardship is prioritized and funded. Some organizations, with the help of PSCC and IEC, have already begun policy engagement. In some parts of the state, organizations expressed that they feel like they have no common ground with their legislators and are looking for guidance on how to successfully engage their representatives in conservation policy efforts. Others expressed concerns with "lobbying" and wanted to ensure that their activities would not impact their 501(c)(3) organizational status.

Engaging Policymakers

Ultimately, as it pertains to policy, organizations were looking for ways to first start the conversation around the important work they do and the way in which state and local government funders might be able to support those conservation efforts.

According to survey responses, conservation organizations are most active in local issues where there is a direct connection to their missions. Issues related to zoning, funding for local parks and forest preserve districts, stormwater management, and land restoration and stewardship partnerships were mentioned in the interviews as common local policy issues.

Organizations are excited about recent Illinois policy developments and the implications for future conservation efforts. They see the Natural Areas Stewardship Act as the first step in a return of conservation funding as a priority for IDNR. Others expressed a desire to strengthen relationships with state legislators so that if a budget impasse takes place again the conservation community has strong advocates in the General Assembly to protect the important funds dedicated to conservation. Organizations were most excited about the possibility of the state beginning to acquire property in the future. While this is not guaranteed, it does provide a statewide strategy to support long-term management.

Taxes

Practitioners were asked about their enrollment in the following programs that provide tax incentives for stewardship of land:

- **Exemption from property taxes under ILCS 200/15-65:** Property is exempt from property taxes when used for charitable or public-benefit purposes, and not leased or otherwise used for profit.

- **Taxed as an Illinois Nature Preserve:** Qualifying lands can be dedicated as an Illinois Nature Preserve. This agreement may result in financial benefits to the landowner, primarily in the form of a charitable contribution deduction on federal income taxes (if the landowner is not a 501(c)(3) nonprofit organization) and a local property tax reduction. The biggest non-financial benefit to the landowner is the assurance that their land will be permanently and legally preserved while still allowing them to enjoy it now and pass it on to their heirs. Properties which are dedicated as Illinois Nature Preserves have their real estate taxes set at $1 per acre per year.
- **Taxed as a conservation easement or as an Illinois Land and Water Reserve:** Conservation easement properties and Illinois Land and Water Reserve properties that are permanently protected may qualify for tax benefits in the form of a local property tax reduction and possibly a charitable contribution deduction on federal income taxes.
- **Conservation Reserve Program (CRP)**: Land enrolled in CRP receives a rental payment from the USDA. This typically applies to agricultural land that's taken out of production for habitat. Land enrolled in CRP is considered "productive farmland" for tax assessment purposes, and land assessed as farmland is generally taxed at a lower rate than other tax assessment classes.
- **Illinois Department of Natural Resources (IDNR) Conservation Stewardship Program:** Landowners that have at least five acres of unimproved land and are willing to commit to developing and implementing a habitat management plan for their property may enroll in the program in exchange for reduced valuation of property taxes.
- **Illinois Forestry Development Act (FDA):** With the passage of the FDA, the Property Tax Code (35 ILCS 200/10-150) was amended to provide a property tax incentive for Illinois timber growers. The amendment to the Property Tax Code states that eligible land being managed under an approved forestry management plan shall be considered as "other farmland". Land assessed as farmland is generally taxed at a lower amount than other tax assessment classes.

When surveyed, 20 out of 24 respondents report utilizing the property tax exemption under the ILCS 200/15-65, though there are concerns among respondents about political backlash in their communities for not paying property taxes. Through the interview discussions, however, the team found that the vast majority of organizations have not had any local issues related to property tax exemption.

While it is good practice to work with local decision makers in order to ensure that backlash will not happen, the team strongly encourages pursuing this option when possible. Land trusts that have achieved property tax exemption for a specific property under ILCS 200/15-65 may not pursue enrollment in other property tax incentive programs for that same property due to the fact that

property tax exemption under ILCS 200/15-65 eliminates property tax liability altogether whereas all other programs only lessen that liability, but cannot eliminate tax liability altogether.

The project team found that 10 land trusts have properties that are taxed as Illinois Nature Preserves, while nine land trusts reported that they have properties that are taxed as conservation easements or Illinois Land and Water Reserves. Respondents not utilizing these programs reported that their reasons for not utilizing these programs are primarily that the land is property tax exempt or not eligible in some other way.

Seven land trusts reported that they have land enrolled in CRP, while five have land enrolled in the Conservation Stewardship Program (CSP). Similarly, the main reasons why this program is not utilized by others is due to their property tax exempt status or other limitations related to eligibility. Three organizations reported not being familiar with the CSP program while two stated that the financial benefit is not significant enough to justify the effort for enrollment in CSP.

Only two organizations reported being enrolled in the Forestry Development Act Program. The main reasons cited for low enrollment were: lack of knowledge about the program, property tax exempt status, and misalignment with organizational priorities related to timber harvesting.

Behavioral and Organizational Dynamics

The nature of conservation work is changing. There are implications to the way in which organizations plan and prepare for stewardship. Successful management of natural resources requires strong collaboration with stakeholders and partners across all levels (federal, state, and NGOs) as well as a potential realignment of priorities and strategies that will enable organizations to have the necessary resources to protect and steward natural resources. This is especially important in the face of changing political and ecological landscapes. This section captures some of those dynamics and the way in which conservation organizations think about the future of the work.

A Culture Shift

During the conducted interviews, many organizations mentioned cultural shifts profoundly impacting the way they are planning and implementing stewardship activities. With the breakdown of the traditional model of turning over restored land for long-term management to public agencies, stakeholders and practitioners in the conservation sector, both private and public, are rethinking who is better positioned to take on long-term management of land.

An internal cultural shift for the conservation land trust community focuses on the need to develop new strategies to finance and implement stewardship of the lands they own and manage in the long-term. Such cultural shifts need to occur internally among staff, organizational leadership, and boards, and should be reflected in organizational policies and principles.

The way in which organizations are starting to shift their land acquisition policies is a testament to this growing change. Traditionally, conservation organizations were primarily in the business of land protection with land stewardship taking a backseat. They would acquire as much land as they could and figure out how to restore and manage it later.

According to interview responses, this model is changing. It was reported that conservation groups are asking donors to commit to providing a stewardship endowment to support the management of the lands that are being donated to the organization. These organizations are identifying resources and putting the plans in place to manage the property before acquiring it. They are also thinking through the long-term financial implications of climate change and other outside factors that may impact their land stewardship efforts.

One example that demonstrates shifts in financing approaches is seen in the Natural Land Institute's working lands initiative. The Natural Land Institute staff has been able to work with their

board, who was primarily a traditional land trust-oriented board, to create organizational infrastructure that allows the organization to maintain farmland as a revenue source and integrate habitat and soil improvements into lease agreements with their tenant farmers.

This shifting approach is also resulting in a renewed focus on stewarding previously protected lands. Organizations have changed bylaws, created policies, modified how they monitor operational costs, and have begun to more thoroughly track volunteer in-kind contributions to better understand the capacity needed to manage their lands.

Prioritization and Vision

Organizational approaches to prioritizing operations and long-term visioning in the context of stewardship and organizational growth vary significantly from one organization to another. However, stakeholders and partners agree that the stewardship of natural lands is the utmost priority. There was a great deal of discussion regarding vision at the organizational level and for the conservation community as a whole.

Several organizations felt that they focus on the day-to-day operations and have limited ability to plan for the long-term. Other organizations think about their work in a more integrated manner. They see themselves more focused on watershed scale work, invasive species management, and connectivity for the community. They see opportunities to create more ecologically and socially resilient communities. In doing so, they hope to create more resilient conservation organizations that could weather government funding deficits through community support.

How each organization envisions the future of conservation and their role in conservation and stewardship of natural lands impacts the caliber of capacity building strategies and financing approaches they select to help achieve their goals.

Conclusion: The Future for Stewardship in Illinois

Illinois has a rich diversity of habitats and landscapes and conservation organizations committed to preserving them. Understanding key challenges that these organizations face allows the stakeholders to better identify needed tools and strategies to overcome the barriers to protect Illinois's natural resources.

The study results presented in this report focus on stewardship, i.e. long-term management, of the land and captures a wide range of perspectives representing the majority of organizations working to preserve natural areas in Illinois across geography and habitat type.

To do so, the project team collected quantitative data through an extensive survey process. The project team also interviewed stakeholders to better understand and interpret data trends observed in the survey. Key findings from the study are outlined below:

Stewardship Capacity

1. Volunteers represent 50 percent of all stewardship hours reported by conservation organizations annually.
2. Contractors play a prominent role in stewardship implementation because they provide skilled labor and equipment at discrete points in time, whereas staff conduct priority setting, planning, and day-to-day implementation of stewardship.
3. In smaller organizations, executive directors and board members are highly engaged in stewardship activities including on-the-ground implementation. In larger organizations or as organizations grow, the executive director and board members have more time to focus on priority setting and fundraising.
4. Conservation organizations seem to not grow their capacity to acquire and manage additional land. Specifically, organizations that manage under 2,000 acres a year typically stay under 2,000 acres due to constraints in capital and labor. Annual labor costs for small (0-500 acres) and mid-size (500-2,000 acres) organizations are relatively consistent at approximately $215,000, with labor cost increasing to $641,000 for large (over 2,000 acres) organizations.

Partnerships

1. The majority of reported partnerships were considered informal, with practitioners emphasizing the importance of individual relationships over institutional relationships in maintaining these partnerships.
2. Whether informal or formal, partnerships within the conservation community are maintained for an average of 15 years for specific types of partnerships.

Funding and Financing

1. Organizations throughout the state continue to utilize a diverse set of funding strategies, but most frequently reported reliance on foundation and individual giving. Non-traditional funding strategies such as environmental markets and working lands funding systems are gaining more traction and were of high interest in the conservation community.
2. Working lands and market-based funding approaches continue to grow in popularity and usage. However, conservation organizations raised concerns about the financial barriers to entry and ability to scale up operations.
3. The team identified that organizations need to better understand investment management specifically as it pertains to endowments, a commonly utilized stewardship funding method.

Policy

1. Overwhelmingly, conservation organizations have a strong desire to better engage with policy makers, but are looking for more clear and consistent direction and advice on the legislative process.
2. Conservation organizations perceive a risk of community backlash associated with removing a protected parcel from the property tax rolls; however, analysis found risk of such an occurrence is minimal. Most organizations have tax exempt properties without community pushback.

Behavioral and Organizational Dynamics

1. There appears to be a cultural shift within conservation organization boards and leadership as they confront the need to diversify funding strategies and prepare for the long-term. This cultural shift is creating opportunities for greater experimentation and innovation throughout the state of Illinois.
2. Organizations are taking a more holistic approach by integrating community engagement, watershed planning, and historical context into their stewardship work.

The study also revealed a vision for the future of stewardship in Illinois among stakeholders in the conservation community. Conservation organizations hope to see themselves and their peers build upon meaningful learning and practices while expanding their reach intentionally and holistically; and building new collaborations and support.

Furthermore, there is a strong need to cultivate the next generation of land stewards as both volunteers and professionals. Finally, the findings made clear that protected lands must be managed in a way that is respectful of the cultural heritage of all people and meet the demands of human and ecological communities.

Appendices

Appendix A: Land Trust Survey

Introduction and Consent

The following survey being administered by Delta Institute, Natural Land Institute, Openlands, Illinois Environmental Council, and Jo Daviess Conservation Foundation is part of a research project to identify stewardship needs, defined as long-term management of land, for our state natural areas and protected lands in Illinois, and to explore new ways for conservation land trusts across the state to increase funding those needs. As part of this, we are seeking information from Illinois land trusts regarding their stewardship activities and the resources committed to caring for your natural and protected lands as well as the challenges that you face.

We plan to collect data in the following ways as part of this project:

- This 90 minute survey as outlined above;
- A recorded in-person interview (2 hours);
- Any clarification and post interview follow-up as appropriate.

Completing this survey indicates your consent as a participant in this study in so far as your responses will be analyzed. Participating in this study is voluntary, and all data collected will be kept confidential. We will protect your confidentiality in all publications and written reports, by sharing aggregate data only. Aggregated data results will be available and shared in summer 2018. Delta Institute is responsible for administering the survey, collecting the data, and post-collection data analysis.

Email Address

Your Current Land Holdings

For each category below, how many acres of land does your land trust currently actively and consistently managing? Leave blank if not applicable.

Land Holding Type	**Total (acres)**
Fee Simple (owned by your land trust)	
Fee Simple (owned by others)	
Conservation Easement (held by your land trust)	
Investment Land (purchased with investment as the primary purpose over conservation)	
Other	

For fee simple land that your organization holds, please break out the total acreage by land type below. If exact numbers are not available, please provide an estimate. If a property could be categorized as more than one land type, choose one land type that best fits that property; leave blank if not applicable.

Habitat Type	**Acres**
Forest	
Savanna	
Prairie	
Wetlands	
Lake, Ponds, and Streams	
Eurasian Grassland	
Other Natural Habitat	
Tillable	
Pasture	
Hayfield	
Other Agricultural Land	
Parkland (e.g. mowed areas, ball fields)	
Trail Corridors	
Other Recreational Land	
Buildings and Structures	

How much land has your organization protected in the past that is now held by another entity (e.g. Conservation District, Department of Natural Resources)?

	In the last 10 years (acres)	Total (acres)
Fee simple		
Conservation Easement		

Has your land trust formally adopted the 2017 Land Trust Alliance Standards and Practices?

1. Yes
2. No
3. Other _____

Stewardship Implementation

Select positions that are involved in stewardship activities, select all that apply

1. Executive Director
2. Stewardship Program director (or similar)
3. Stewardship Program coordinator (or similar)
4. Other Program Director
5. Other Program Coordinator (or similar)

6. Fundraising Director (or similar)
7. Contractor(s)
8. Board Member(s)
9. Volunteer(s)
10. Interns
11. Other Stewardship Program Staff
12. Other _____

For each position below, specify the number of individuals involved and the hours per year on average those individuals focus on stewardship related activities (a typical full time position is 1920 hours/year):

	Number of people	Hours/year (total)
Executive Director		
Stewardship Program director (or similar)		
Stewardship Program coordinator (or similar)		
Other Program Director		
Other Program Coordinator (or similar)		
Fundraising Director (or similar)		
Contractor(s)		
Board Member(s)		
Volunteer(s)		
Interns		
Other Stewardship Program Staff		
Other		

For each position below, check all roles that apply

	Priority Setting	Fundraising	Developing Management Plans	Implementing Stewardship Activities	Coordinating Volunteers	Coordinating Contractors and Other Stewardship Staff
Executive Director						
Stewardship Program director (or similar)						
Stewardship Program coordinator (or similar)						
Other Program Director						

Other Program Coordinator (or similar)						
Fundraising Director (or similar)						
Contractor(s)						
Board Member(s)						
Volunteer(s)						
Interns						
Other Stewardship Program Staff						
Other						

Please, provide any additional information about organizational capacity and roles associated with stewardship activities if not covered in the questions above.

Implementation of Stewardship Activities

Do you track costs for stewardship activities?

1. Yes
2. No
3. Other _____

In the last 10 years, how often has your organization undertaken the following stewardship activities?

	Annually	Every 2-3 years	Every 4-5 years	Every 6-10 years	Never	NA
Public Infrastructure Maintenance (e.g. benches, fencing, signs, paved trails, etc.)						
Public Infrastructure Replacement						
Supplies Maintenance (e.g., chainsaws, backback sprayers, hand tools, etc.)						
Supplies Replacement						
Equipment Maintenance (e.g., trucks, tractors, mowers, etc.)						
Equipment Replacement						

In the last 10 years, how often has your organization undertaken the following stewardship activities for the given land type? If your land trust does not own or manage any one of these land types, please select 'NA.' For example, if you land trust does not own any pasture, select 'NA' for all activities.

Forest

	Annually	Every 2-3 years	Every 4-5 years	Every 6-10 years	Never	NA
Update management plan						
Site monitoring						
Invasive species control (plants)						
Nuisance wildlife control						
Prescribed fire						
Grazing						
Hunting						
Vegetation Management (e.g., timber stand improvement, overseeding, etc.)						

Savanna

	Annually	Every 2-3 years	Every 4-5 years	Every 6-10 years	Never	NA
Update management plan						
Site monitoring						
Invasive species control (plants)						
Nuisance wildlife control						
Prescribed fire						
Grazing						
Hunting						
Vegetation Management (e.g., timber stand improvement, overseeding, etc.)						

Prairie

	Annually	Every 2-3 years	Every 4-5 years	Every 6-10 years	Never	NA
Update management plan						
Site monitoring						
Invasive species control (plants)						
Nuisance wildlife control						
Prescribed fire						
Grazing						
Hunting						
Vegetation Management (e.g., timber stand improvement, overseeding, etc.)						

Wetlands

	Annually	Every 2-3 years	Every 4-5 years	Every 6-10 years	Never	NA
Update management plan						
Site monitoring						
Invasive species control (plants)						
Nuisance wildlife control						
Prescribed fire						
Grazing						
Hunting						
Vegetation Management (e.g., timber stand improvement, overseeding, etc.)						

Lake, Ponds, Streams

	Annually	Every 2-3 years	Every 4-5 years	Every 6-10 years	Never	NA
Update management plan						
Site monitoring						
Invasive species control (plants)						
Nuisance wildlife control						
Prescribed fire						
Grazing						
Hunting						
Vegetation Management (e.g., timber stand improvement, overseeding, etc.)						

Eurasian Grassland

	Annually	Every 2-3 years	Every 4-5 years	Every 6-10 years	Never	NA
Update management plan						
Site monitoring						
Invasive species control (plants)						
Nuisance wildlife control						
Prescribed fire						
Grazing						
Hunting						
Vegetation Management (e.g., timber stand improvement, overseeding, etc.)						

Tillable

	Annually	Every 2-3 years	Every 4-5 years	Every 6-10 years	Never	NA
Update management plan						
Site monitoring						
Invasive species control (plants)						
Nuisance wildlife control						
Prescribed fire						

Grazing						
Hunting						
Vegetation Management (e.g., timber stand improvement, overseeding, etc.)						

Pasture

	Annually	Every 2-3 years	Every 4-5 years	Every 6-10 years	Never	NA
Update management plan						
Site monitoring						
Invasive species control (plants)						
Nuisance wildlife control						
Prescribed fire						
Grazing						
Hunting						
Vegetation Management (e.g., timber stand improvement, overseeding, etc.)						

Hayfield

	Annually	Every 2-3 years	Every 4-5 years	Every 6-10 years	Never	NA
Update management plan						
Site monitoring						
Invasive species control (plants)						
Nuisance wildlife control						
Prescribed fire						
Grazing						
Hunting						
Vegetation Management (e.g., timber stand improvement, overseeding, etc.)						

Parkland

	Annually	Every 2-3 years	Every 4-5 years	Every 6-10 years	Never	NA
Update management plan						
Site monitoring						
Invasive species control (plants)						
Nuisance wildlife control						
Prescribed fire						
Grazing						
Hunting						
Vegetation Management (e.g., timber stand improvement, overseeding, etc.)						

Trail Corridors

	Annually	Every 2-3 years	Every 4-5 years	Every 6-10 years	Never	NA
Update management plan						
Site monitoring						
Invasive species control (plants)						
Nuisance wildlife control						
Prescribed fire						
Grazing						
Hunting						
Vegetation Management (e.g., timber stand improvement, overseeding, etc.)						

Other

	Annually	Every 2-3 years	Every 4-5 years	Every 6-10 years	Never	NA
Update management plan						
Site monitoring						
Invasive species control (plants)						
Nuisance wildlife control						
Prescribed fire						
Grazing						
Hunting						
Vegetation Management (e.g., timber stand improvement, overseeding, etc.)						

Partnerships

Please provide information on UP TO ten partnerships from the last 10 years that have been impactful to your organization related to stewardship? Select all activities that apply. For the types of partnerships, partnerships, and activities conducted columns, choose from the Options List Provided.

Questions Options to Choose From

Type of Partnership	Partnership Structure	Activities Conducted
Cooperative Invasive Species Management Areas (CISMA) Cooperative Weed Management Areas (CWMA) Burn co-op Invasive species strike team Local government State agency Land trust Other	Informal partnership with no written agreement Formal partnership with MOU Formal partnership with Cooperative Agreement Partnership has its own legal status (e.g., 501c3) Formal partnership with Fee-for-Service Contract	Activity 1: Equipment Sharing Activity 2: Data Sharing Activity 3: Grant Writing Activity 4: Sharing Staff and Volunteers for Stewardship Implementation Activity 5: Joint management of a specific site(s)

	Partner Organization Name	Service Area	Type of Partnership	Partnership Structure	Activities	Year Started	Ongoing? Y/N
1.							
2.							
3.							
4.							
5.							
6.							
7.							
8.							
9.							
10.							

Funding

Circle all the STEWARDSHIP funding sources that you have utilized in the last 10 years

1. Foundation grants
2. Local government programs
3. State government programs
4. Federal government programs
5. Annual Individual Fundraising
6. Endowments and Investments
7. Working Lands Income
8. Market Mechanisms (e.g. carbon credits, mitigation, ecosystem service payments, etc.)

Does your land trust have designated endowment funds?

	Select all that apply	If yes, select type	If other, specify below
Board endowment funds	❑	1. General, such as an operating endowment 2. Site specific for managing a preserve 3. Other	
Donor endowment funds	❑	1. General, such as an operating endowment 2. Site specific for managing a preserve 3. Other	

Tax Incentives

Land Trusts are sometimes able to take advantage of preferential tax status. For your organization's fee title properties, identify any tax incentive program(s) that your organization has utilized in the last 10 years. Select all that apply.

	Applies to any of your organization's fee title properties (Y/N)	If No, Why not?
Utilizing Exemption from property taxes (under ILCS 200/15-65)		1. Don't know about the program 2. Too much paper work 3. Financial benefit too small to justify the effort 4. Don't have technical expertise 5. Land is tax exempt 6. Not applicable 7. Other
Enrolled in Illinois Department of Natural Resources Conservation Stewardship Program		1. Don't know about the program 2. Too much paper work 3. Financial benefit too small to justify the effort 4. Don't have technical expertise 5. Land is tax exempt 6. Not applicable 7. Other
Enrolled in Illinois Forestry Development Act		1. Don't know about the program 2. Too much paper work 3. Financial benefit too small to justify the effort 4. Don't have technical expertise 5. Land is tax exempt 6. Not applicable 7. Other
Enrolled in the Conservation Reserve Program (for property tax purposes)		1. Don't know about the program 2. Too much paper work 3. Financial benefit too small to justify the effort 4. Don't have technical expertise 5. Land is tax exempt 6. Not applicable 7. Other
Is taxed as an Illinois Nature Preserve		1. Don't know about the program 2. Too much paper work 3. Financial benefit too small to justify the effort

		4. Don't have technical expertise 5. Land is tax exempt 6. Not applicable 7. Other
Is taxed as a conservation easement or Illinois Land & Water Reserve.		1. Don't know about the program 2. Too much paper work 3. Financial benefit too small to justify the effort 4. Don't have technical expertise 5. Land is tax exempt 6. Not applicable 7. Other
Enrolled in another program that offers preferential tax treatment		1. Don't know about the program 2. Too much paper work 3. Financial benefit too small to justify the effort 4. Don't have technical expertise 5. Land is tax exempt 6. Not applicable 7. Other

If you selected "Other" reason above, please explain.

Interview Guide

BASIC INFO

DATE:_____

LOCATION:_____

START TIME:_____ **END TIME:**_____

INTERVIEW PARTICIPANTS
INTERVIEWEES (NAME AND TITLE):_____

_____

_____

_____

INTERVIEWERS:_____

_____

BEFORE WE START GUIDANCE

- Thank You!
- Why and How?
    - We embarked on this long-term study of stewardship with the goal of increasing the sustainable health of our Illinois Ecosystems.
    - Stewardship is a difficult thing to fund and execution can be complex.
    - When we completed phase one looking at different funding mechanisms that could support stewardship and developed the Dual Approach framework, we heard the feedback of the community that there was more research needed
    - This second phase is divided into a few efforts, this being the first one, to investigate your needs, and the needs of the broader conservation community in depth, and the opportunities that may exist to leverage our collective force to increase impact. From this work, we will develop a detailed study that will look at stewardship at a statewide level.

    - We will use that information as the foundation for the creation of a set of tools that could be immediately utilized by practitioners to better take advantage of existing and new stewardship funding mechanisms while continuing to investigate and develop the dual approach concept.
- Defining Stewardship
    - For the purposes of our work, we have defined stewardship as:
        - "The year-to-year management of properties owned in fee or held in conservation easement."
    - We are not collecting information related to land or easement acquisition or short-term ecological restoration/re-creation of natural habitat. Stewardship costs may include things like organizational indirect costs and other incidentals.
- Reminders
    - This is a collaborative, statewide effort:
        - We have signed an MOU with PSCC and are working with the Vital Lands Illinois Network to ensure that the land trust community is involved
        - This is envisioned to be an ongoing dialogue. Working together and producing something that is beneficial to the group
        - Our intent isn't to galvanize any existing funding sources, or to call out any specific organizations. Everything will be presented as state level aggregated data.
        - Data and information collected from individual organizations will be kept confidential. The final report will present the results of this research project in aggregate.
    - Data Sharing and confidentiality
        - All final reports and state level aggregated findings will be shared with everyone involved and through VLI and PSCC
        - The data will only be released with the expressed permission of the organization and will otherwise be aggregated statewide
    - When answering questions
        - try to think about where you currently are with your stewardship funding and capacity, as well as what your ideal would be
        - If you need more time, that is okay and we can always follow up.

Questions

Category: Stewardship capacity

Section Goal: Identify and Quantify Stewardship Needs and Related Staff Roles	
Target Information	**Questions**
Tracking of Land	• Thank you for filling out the tables sent detailing your acreage information. Can you share a little more about how you currently track acres, parcels and habitat types? (Tech, staff, systems, etc.)
Stewardship Roles and Skills	• In the survey, we asked you about who at your organization is primarily responsible for stewardship activities. Can you explain the rationale, pros/cons, or other factors that have created that structure? • Is your board actively engaged in fundraising for stewardship activities and donor cultivation for increasing stewardship? Describe their activities.
Volunteer Time	• How much do you rely on volunteers for stewardship and how do you track it? ○ How many hours per year do your volunteers devote to stewardship activities? • How do you manage your volunteers? • How do you value your volunteers? ($$$?) • How much do you project using volunteers in the future?
Current land management activities	• Do you currently have a budget specifically for stewardship activities? • Are you able to implement stewardship activities at the desired level? Why or why not? • When you filled out the management table in the survey, were there other stewardship activities that were missing?

Other Resources for Stewardship	• What are other types of resources do you use to implement stewardship? Cars, equipment, other?
	  ○ Do you own your equipment? Rent? Share?
	  ○ Are there other resources you wish you had to better implement stewardship activities?

Equipment Barriers	• Does your land trust currently have enough equipment to adequately steward your fee properties?

	• Does your land trust factor in your equipment needs and capacity when considering new fee property acquisitions? • Is limited equipment capacity a barrier to your land trust acquiring more fee lands in the future? Why or why not?
Additional Resources	• What resources (besides staff time) do you still need to implement stewardship activities, but currently don't have?
Staffing	• Are there additional skills, expertise, certifications or knowledge you would hope your staff would have in the future as it relates to stewarding your properties.
Contractors	• Does your land trust use contractors to implement routine stewardship activities on fee lands (not including short-term ecological restoration/re-creation projects)? • If yes, do you feel that the contractors in your service region currently have the expertise, knowledge, skills, and certifications needed to adequately steward your fee properties? If no, why not?
LTA Association	• Has your land trust formally adopted the 2017 Land Trust Alliance Standards and Practices? • Is your land trust accredited by the Land Trust Alliance? If no, why not?
Other barriers	• What do you see as the barriers to enhancing or expanding your current stewardship activities?
Category: Partnerships	
Section Goal: Assess extent of partnerships and how they create value	
Target Information	**Questions**
Current Partnership Establishment	• Based on the information you provided in the survey, how do you initiate, and structure your partnerships, and how do they influence your work? • Are the partners you work with part of formal partnership agreements, or are they informal and ad hoc?

Past Partnership	• How did past partnerships evolve, turn out, and end?
Government Relationships	• Which bodies of government do you interact with most frequently/ which are your best relationships?
Views on Partnership	• How are your current partnerships functioning and what value do you gain? • What are any issues you see with your existing or past partnerships that could be better? • If you are not currently part of a stewardship partnership, would you want to join one if given the opportunity? Why or why not?
Contributions to Partnership	• How do you tend to contribute to partnerships? What resources do you bring and what do you gain?

Category: Funding Sources & Revenue	
Section Goal: Identify current funding sources and how they are utilized	
Target Information	**Questions**
$$$ for Stewardship	• Do you currently have a budget for stewardship? • Do you currently have a budget/fund for future fee land or easement purchases? • Do you currently have a budget/fund for the stewardship of future fee land and easement acquisitions?
Funding Stewardship Activities	• What external stewardship funding sources do you currently use (i.e. grants, state, federal, private, endowment, etc.)?
Grants and the decision making process	• What types of grants have you used in the past for stewardship? Capacity, program, project, operating? • How do you decide what grants to pursue?
Annual Individual Fundraising	• Do you have an annual fundraising plan with targets by organizational area?

	• Does your fundraising include fundraising for land management and long term stewardship?

State and Local involvement	• How much have you relied on state or local funding for stewardship-related activities?
	  ○ What sources? (NAAF, OLT, OSLAD, capital funding)
	  ○ Have you worked with private landowners to access any state funding for stewardship? (CREP or CRP, others)
	  ○ How much have you relied on state and local agencies to be the long-term owner of fee properties that were originally protected by your land trust?

Federal Involvement	• How much have you relied on federal funding for stewardship-related activities?
	  ○ What sources?
	  ○ Have you worked with private landowners to access any federal conservation funding for stewardship?
	  ○ Was this a pass-through grant that was ultimately paid to your land trust by the state?

Endowments and Investments	• Can you share more about your funds as mentioned in the Survey? • What is the typical annual distribution percentage from your endowments and what portion of that is used for stewardship? • Do you participate in traditional investment portfolios, or do you also participate in impact investing portfolios? • Do you have an external fund manager, or does your organization do that internally? • Do you find your endowment distribution to be sufficient? • Would you be willing to share information about your 2017 investment income?
Interest in Working Lands Model	• If your land trust currently owns working lands, do you intend to keep any working land in production in perpetuity? • Were these working lands purchased, donated, or a mixture of both? • How much do you generate from your working lands annually?

	• Would your organization be interested in acquiring farmland with the intention of continuing agricultural practices in perpetuity as a way to generate revenue for the organization? • If a working lands revenue model is of interest, what are current barriers or challenges? • Would you like to know more about such a model?
Market Mechanisms	• What is your organization's opinion of generating revenue from your currently owned land through mitigation banking credits, sale of products, ecosystem services, or other?
Financial Summary	• Would you share with us your last fiscal year financial audit summary if available?

Category: Policy Related	
Section Goal: Looking at Policy-related Impacts to Stewardship and Land Trust Engagement with Policy Makers	
Target Information	**Questions**
Policy barriers	• Are there any state or local policies that have been a barrier to your stewardship work?
Financial tax incentives	• How does the way your property is taxed impact your work?
Local support	• Does your county or municipality offer any incentives or other policies to support your work that are not available in every local jurisdiction?
Policy structures	• Think about the structures that allow permanent conservation of land such as conservation easements, nature preserve designation, or other designations that protect open space. Is there anything that can be done to improve these land protection structures to support stewardship?
Engagement with Policy Makers	• Does the staff or board of your organization actively create relationships with your local and state legislators?

	• If so, what do you see as the benefits? If not, what are the barriers? • What would be most helpful to you for facilitating your organizations strength in this area?

Category: Future Focused	
Section Goal: Characterize capacities and attitudes of board and staff for stewardship	
Target Information	**Questions**
Prioritization	• How do you prioritize stewardship needs and activities? • Who sets your priorities and how?
Changes in the future	• How do you see your stewardship needs changing over time?
Stewardship as part of larger land protection	• How does stewardship capacity of your organization, or partners factor into your land protection decisions?
The Future	• What do you hope to see for the future of stewardship in our state?

Appendix C: Coding Thematic Categories

Tier 1 codes

A. Stewardship	B. Partnerships	C. Funding	D. Policy	E. Behavioral
Tracking	Government	Budget	Internal	Public Perception
Roles	Peer Organizations	Grants	Local	Prioritization
Volunteers	Businesses	State	State	Changes
Activities	Past Partnerships	Federal	Federal	Vision
Equipment	Views	Donors	Taxes	Acquisition
Staffing	Contributions	Endowment	Structures	Internal Culture
Contractors	Models	Investments	Elected Officials	
Lta	Benefits	Funding model		
Skills	Downsides	Local		
Board		Working lands		
Current status		Fee for service		
Burns		Mitigation		
		Private lands		
		Unrestricted		

Tier 2 codes

A. Stewardship	B. Partnerships	C. Funding	D. Policy	E. Behavioral
A1. Tracking of land	B1. Current partnership establishment	C1. $$$ for stewardship	D1. Policy barriers	E1. Prioritization
A2. Stewardship roles and skills	B2. Past partnership	C2. Funding stewardship activities	D2. Financial tax incentives	E2. Changes in the future
A3. Volunteer time	B3. Government relationships	C3. Grants and the decision making process	D3. Local support	E3. Stewardship as part of larger land protection
A4. Current land management activities	B4. Views on partnership	C4. Annual individual fundraising	D4. Policy structures	E4. The future

A5. Other resources for stewardship	B5. Contributions to partnership	C5. State and local involvement	D5. Engagement with policy makers	
A6. Equipment barriers		C6. Federal involvement		
A7. Additional resources		C7. Endowments and investments		
A8. Staffing		C8. Interest in working lands model		
A9. Contractors				
A10. LTA association				
A11. Other barriers				

Appendix D: Labor hourly rates used in analysis

Position	Hourly rate	Based on
Board	$24.08	Illinois Department of Human Services, volunteer rates (http://www.dhs.state.il.us/page.aspx?item=19735)
Contractors	$20	Bureau of Labor Statistics, Wage Estimates Illinois, May 2018 (https://www.bls.gov/oes/current/oes_il.htm); Pesticide Handlers, Sprayers, and Applicators, Vegetation used as proxy, rounded up
Executive Director	$43.35	2017 Land Trust Salaries and Benefits Survey (lta.org/salarysurvey); average salary, Midwest
Fundraising Director	$38.44	2017 Land Trust Salaries and Benefits Survey (lta.org/salarysurvey); average salary, senior fundraising staff
Interns	$8.25	Illinois minimum wage (https://www.minimum-wage.org/illinois)
Stewardship Program Coordinator	$22.51	2017 Land Trust Salaries and Benefits Survey (lta.org/salarysurvey); average salary, mid-level land stewardship staff
Stewardship Program Director	$29.77	2017 Land Trust Salaries and Benefits Survey (lta.org/salarysurvey); average salary, senior level land stewardship staff
Volunteers	$24.08	Illinois Department of Human Services, volunteer rates (http://www.dhs.state.il.us/page.aspx?item=19735)
Other Program Director	$32.05	2017 Land Trust Salaries and Benefits Survey (lta.org/salarysurvey); average salary, senior communications staff
Other Program Coordinator	$25.61	2017 Land Trust Salaries and Benefits Survey (lta.org/salarysurvey); average salary, mid-level land protection staff
Other Stewardship Program Staff	$22.51	2017 Land Trust Salaries and Benefits Survey (lta.org/salarysurvey); average salary, mid-level land stewardship staff
Other	$20	

Appendix E: Methodology

This study specifically addresses natural areas managed by non-profit conservation organizations despite the fact that in Illinois protected natural areas can also be managed by public agencies or private landowners. We specifically examined the management activities of nonprofit conservation organizations on land they have purchased directly, known as fee-simple land. This study does not include land that is under conservation easements owned by these organizations. We focused on the current status of fee-simple land under management and identified existing strengths as well as barriers this constituency associated with an increasingly significant role in long-term management.

The team sought to assess how the 46,714 acres of land protected by land trusts or conservation nonprofits through fee-simple ownership is currently being stewarded and identify best practices, gaps, and opportunities.[1] Stewardship was examined through five major topic areas: 1) stewardship capacity, 2) partnerships, 3) funding and financing, 4) policy, and 5) behavioral and organizational dynamics.

The project team began by working with the Prairie State Conservation Coalition (PSCC) to develop an engagement strategy that included in-person interviews and survey work, coupled with desktop research. The team designed the survey to cover quantitative information while interviews were conducted to focus on qualitative information to shed light on motivations and justifications for particular decisions and actions reported in the survey.

Surveys were distributed digitally via the online platform, QuestionPro. The survey instrument can be found in Appendix A. Survey data was then organized utilizing Google Sheets and Microsoft Excel. Data were summarized and visualized using the software platforms Tableau and Kumu. The interviews were conducted with one researcher from Delta Institute and at least one land trust representative from the project team. These interviews followed the same five-part format as previously discussed. The Interview Guide can be found in Appendix B. Interviews were transcribed

[1] According the to I-View database (http://www.prairiestateconservation.org/pscc/iview/), of the over one million acres of currently protected land, 46,714 acres of fee simple land is protected by land trusts or conservation nonprofits.

and coded using a key of categories and thematic key words. A list of these key words can be found in Appendix C.

All survey data and interview data is anonymous within this report and the conclusions are drawn at the state level. The analysis was coupled with internet-based research on both the individual organizations and the broader field. With this research approach we were able to get a deep understanding of the conservation organizations in Illinois and the current state of land stewardship.