



# ENGAGEMENT ORGANIZING

“PEOPLE POWERED CHANGE”

OLTA ANNUAL GATHERING  
NOVEMBER 1, 2023

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# LEARNING GOALS

01

The key concepts  
of Engagement  
Organizing

02

Specific examples  
of how land  
trusts apply  
Engagement  
Organizing in  
their work

03

Reflection on  
how and why get  
better at  
Engagement  
Organizing

04

Commitment to  
explore the  
concept of  
Engagement  
Organizing in  
your organization

# AGENDA

- 1 Basics of Engagement Organizing
- 2 Storytelling
- 3 Vision, Mission and Theory of Change
- 4 Pyramids (Recruitment, Mobilization, Distributed Leadership)
- 5 Data and Databases
- 6 Building Power through Advocacy





**WHY DO WE NEED TO ORGANIZE?**



# **WHAT FORCES IN HUMANITY ARE WORKING AGAINST THE GOALS OF ENVIRONMENTAL MOVEMENTS?**

- Corporate sector players keep extracting more resources –take it all and move on
- Economic activity driven by an unrestrained growth mandate
- Human impacts at the global geophysical level –Climate Change being one
- Industrial and housing development/ sprawl
- An increasing population prompted to demand high material standards of living
- Income entering Canada looking for a maximum return on investment
- Too much power in the hands of politicians.

# HOW DO WE COUNTER THESE FORCES?

**We need to evolve our practice**

**Engagement Organizing** asks us to:

- Examine our assumptions about how we think we can change the world around us;
- Change the trajectory of how to achieve our mission;
- Examine and reflect on how we bring about change.





# WHAT IS ENGAGEMENT ORGANIZING?



Finding **people** and organizations that have the same values/interests as you;



Building **relationships** with them so you get to know each other better;



Encouraging and **supporting** those who want to do/give more;



**Letting them run** with their enthusiasm and growing capacity.



# TYPES OF ENGAGEMENT ORGANIZING

**EO to meet long-term  
organizational  
vision/mission**

Building organizational capacity  
to undertake many actions to  
achieve a long-term goal

Dogwood  
Couchiching Conservancy  
Ecology Ottawa  
Nature Trust of NB

**EO to achieve a campaign  
objective**

Campaign to get a decision  
maker to make the decision  
you want

Lead Now  
Dogwood  
Greenpeace

**EO to achieve an electoral  
objective**

Elect a specific candidate in an  
election

Sanders' campaign  
Obama's campaign

# WHAT IS ENGAGEMENT ORGANIZING?

Engagement  
Organizing evolved  
land trusts;

Increase your  
people power;

Who then can buy  
and steward more  
land.

# How do we build people power for our organization?



The tools of EO



Recruit people



Deepen relationships



Promote initiative



Mobilize people to volunteer, donate, communicate etc.



Distribute leadership





# STORYTELLING: GANZ' KEY LEADERSHIP PRACTICES

- Creating shared stories.
- Creating relational commitment - working together on behalf of the common cause.
- Creating shared structure - collaborate effectively on behalf of the common goal.
- Creating shared strategy - turn what we have (resources) into what we need (power) to get what we want (outcomes).
- Creating shared measurable action - clear, measurable outcomes.

Source: Marshal Ganz of Harvard University, Institute for change leaders

# Storytelling

Emotions

Values

Actions







Source: Marshall Ganz



“

**If I am not for myself, who will be for me?  
If I am only for myself, what am I?  
And if not now, when?**

Hillel (Pirkei Avot Chapter 1:14)

## STEP 1

### **YOUR PERSONAL INSPIRATION - ME**

Why do you do the work that you do? Why is it important to you? What were your motivations to get involved in conservation and environmental work? Tap into a particular personal experience or feeling.

## STEP 2

### **FROM PERSONAL TO PROFESSIONAL - US**

What about the conservation community would inspire others to join your work? What values do you think are central to your efforts or that make you believe in this community? What is a challenge that this group of people have overcome together?

## STEP 3

### **CREATING A SENSE OF URGENCY: WHY NOW?**

What is the problem that your supporters face? Why is it urgent to organize now? What action are you asking people to take?

## STEP 4

### **REFINE YOUR STORY**

Combine elements of the questions above and values sparked from the personal, professional, and 'the now' to craft your story. Practice telling this with a partner and refine!

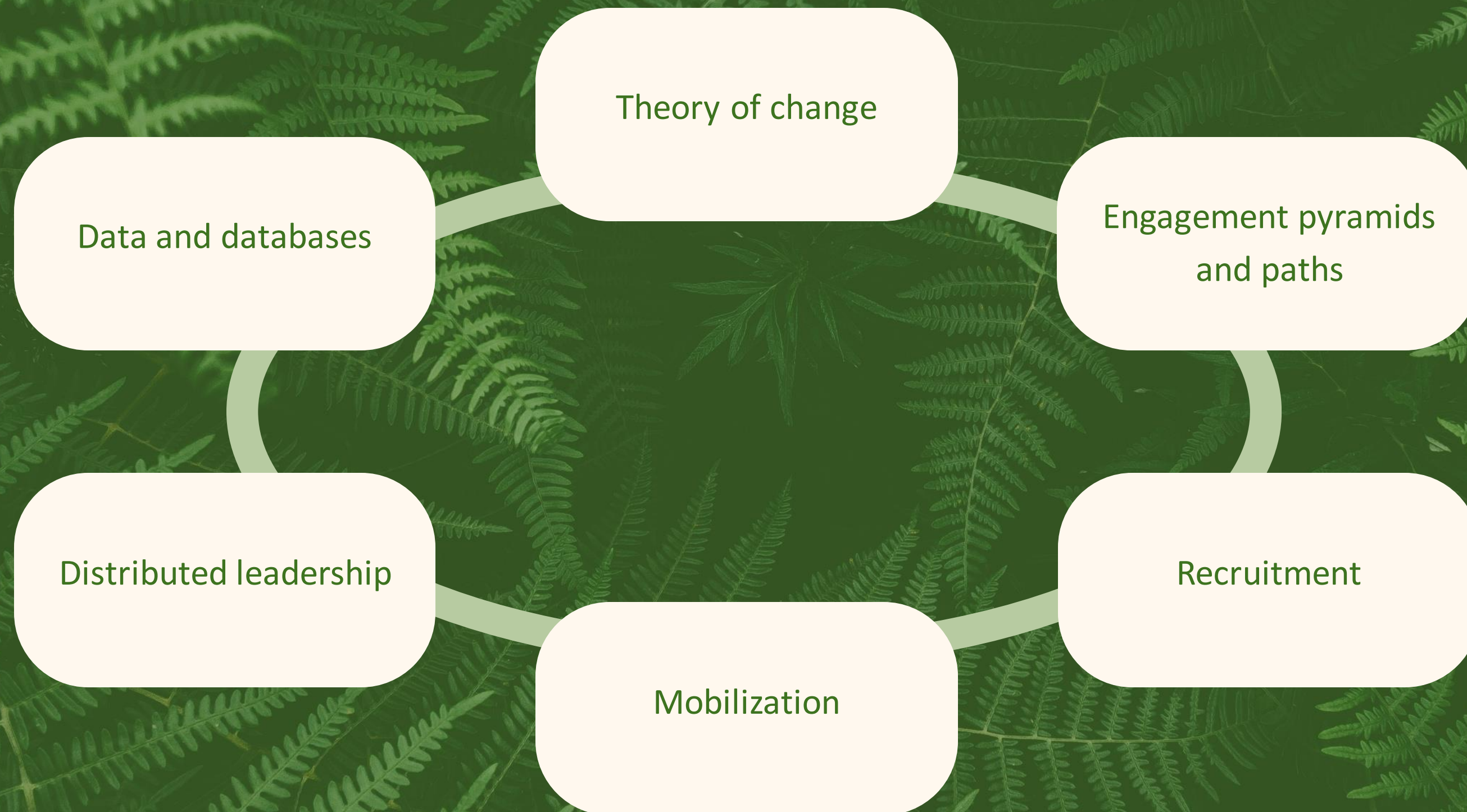


# **STORYTELLING EXERCISE**

- 5 minutes to develop your story
- 10 minutes to share with your group
- 5 minutes to have someone from the audience to share

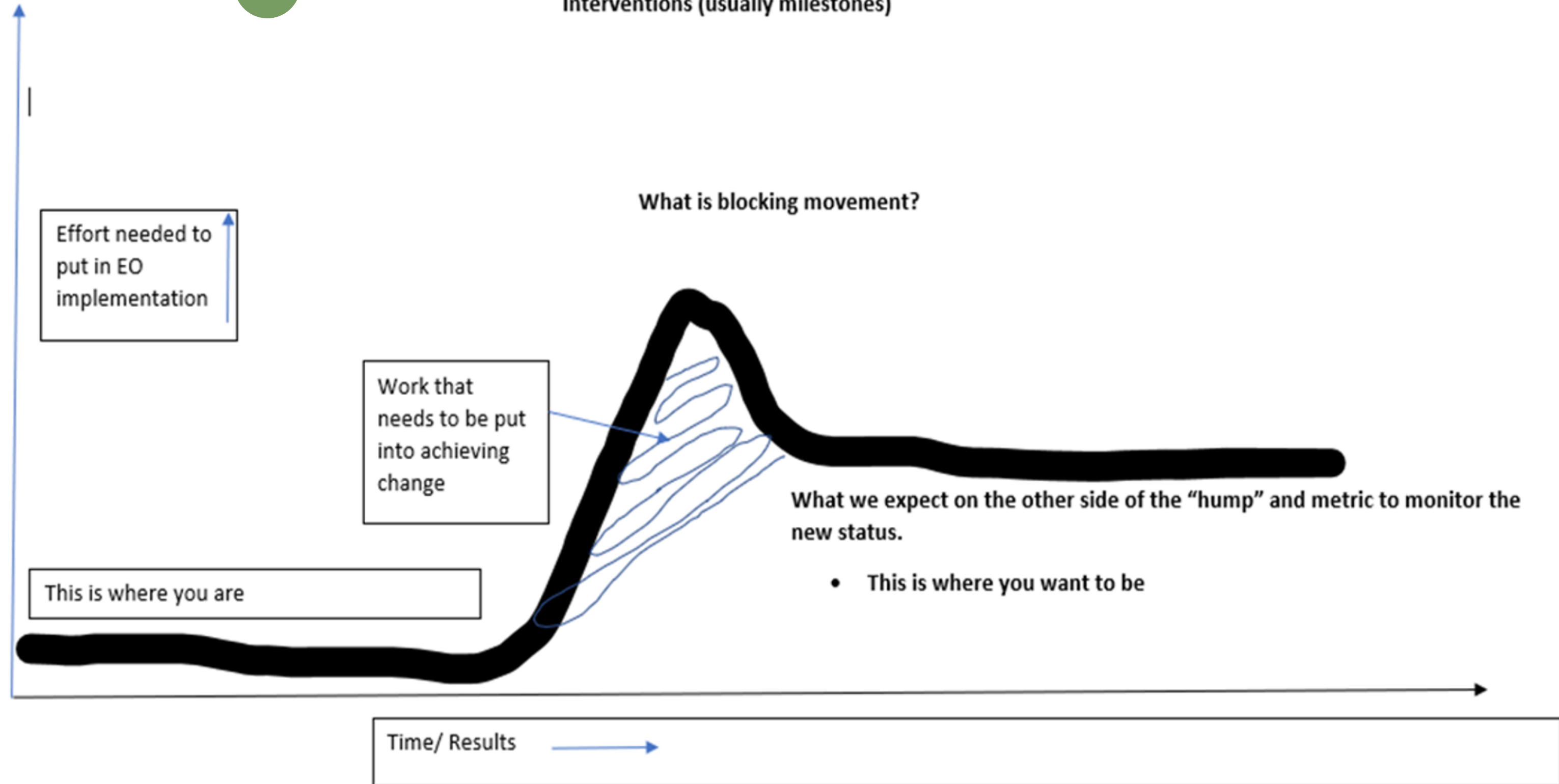


# CORE ELEMENTS OF ENGAGEMENT ORGANIZING





Interventions (usually milestones)







# STRATEGY: DEVELOPING TRAJECTORY

**Mission**

**Vision**

**Elevator Pitch**

**Theory of change**



# DEFINING VISION, MISSION, AND THEORY OF CHANGE

## VISION

- Identifies the destination we are striving for
- Is the realm of the future
- Max 5-25 words

## MISSION

- In the realm of today
- What do you do and why do you exist

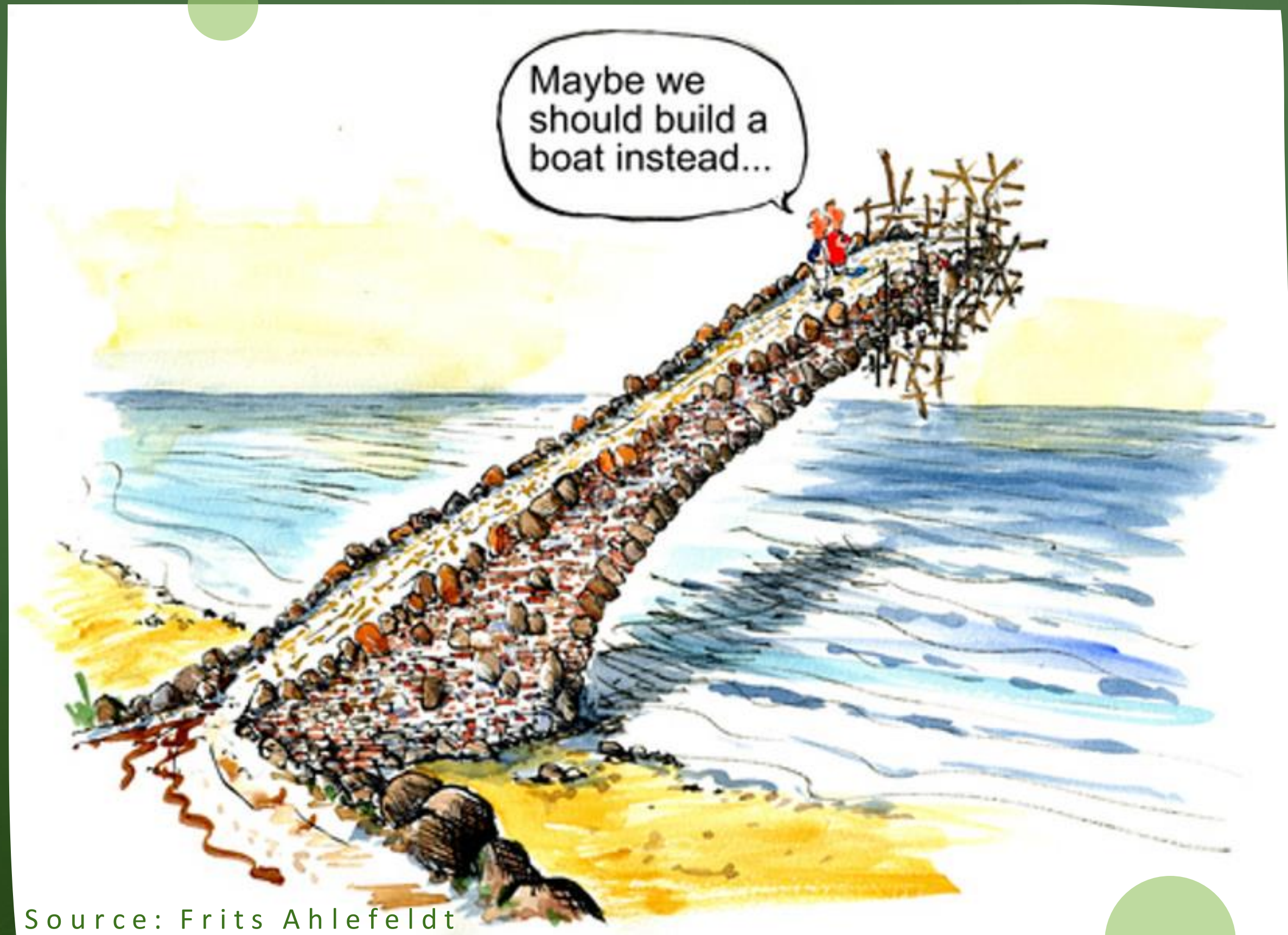


# THEORY OF CHANGE

If we do **X**, we expect **Y** to happen (because...)





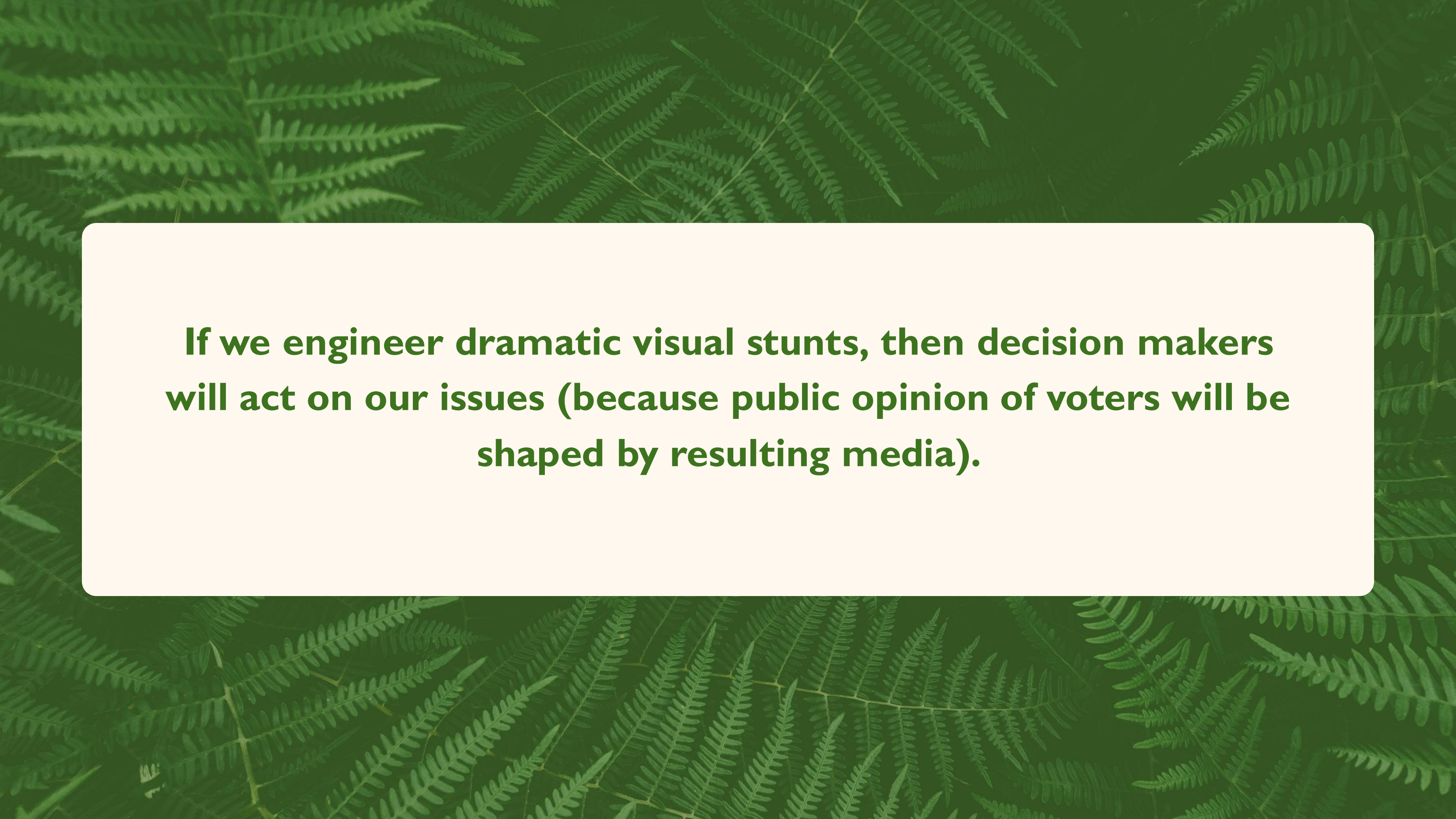


Source: Frits Ahlefeldt



**GREENPEACE**





**If we engineer dramatic visual stunts, then decision makers will act on our issues (because public opinion of voters will be shaped by resulting media).**





**If we raise money and recruit volunteers with cars, then we can feed those who are less able and less mobile (because we can buy food and deliver it).**



# **AN ENGAGEMENT ORGANIZING THEORY OF CHANGE**

If we combine organizing practices, digital tools & data, then we will engage people at scale and achieve bigger goals (because more people equals more capacity).

# **Mission, Vision - Theory of Change Leading to Strategy**





## **Mission**

Preserving a ribbon of wilderness, for everyone, forever.

## **Vision**

The Bruce Trail secured within a permanently protected natural corridor along the Niagara Escarpment.





# Bruce Trail CONSERVANCY

## Our Organization's Theory of Change

**IF** we preserve and steward land along the Niagara Escarpment and give people the opportunity to explore it through a fantastic, publically accessible footpath

**THEN** we will create a continuous conservation corridor that is protected for generations to come

**BECAUSE** people felt connection to the natural spaces of the Niagara Escarpment and a desire to be involved in their protection.





**The Bruce Trail  
Conservancy has  
created an  
ambitious plan for  
conservation and  
connection to  
nature.**

# **2030 STRATEGY**

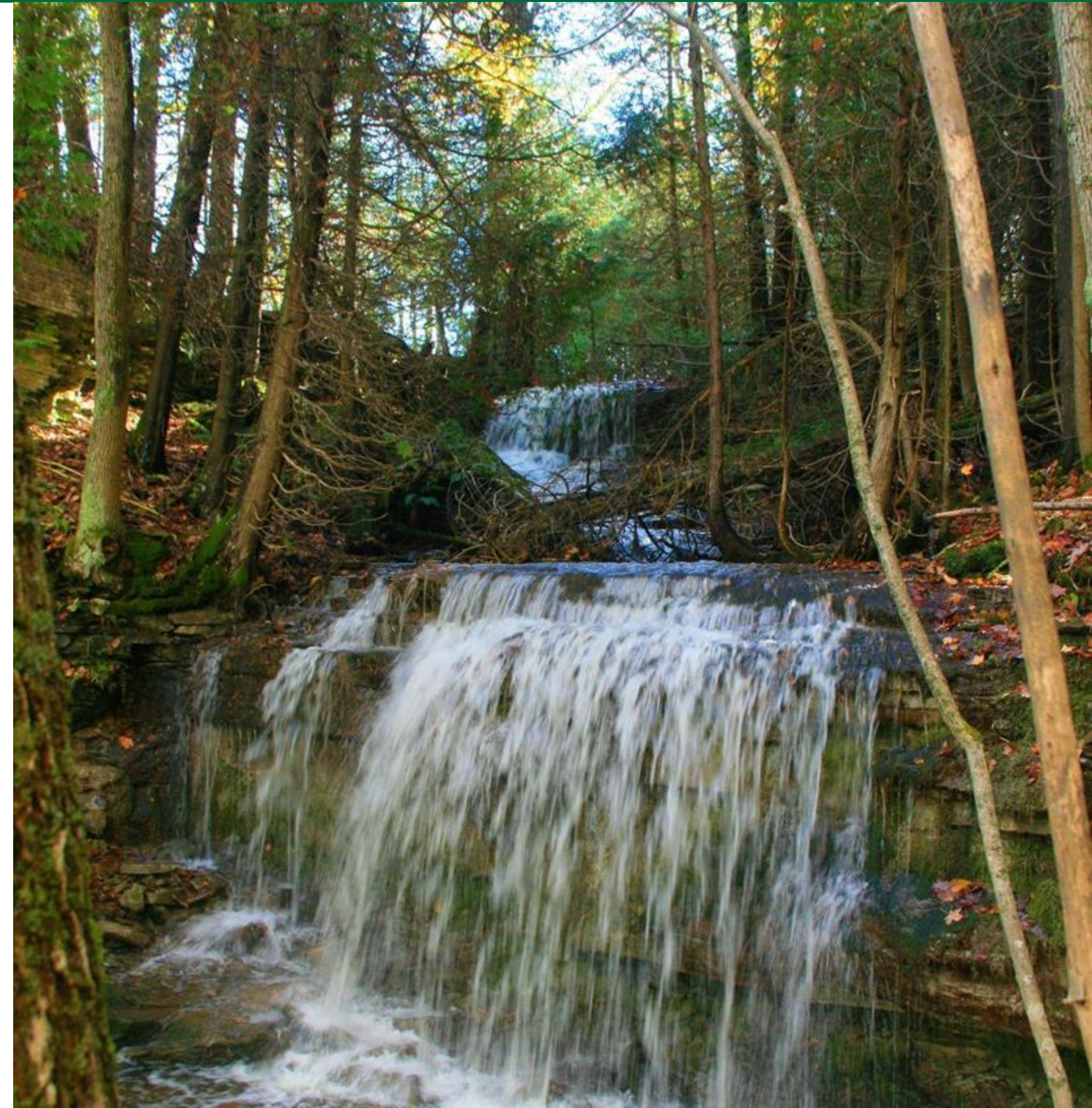
AN AMBITIOUS PLAN FOR CONSERVATION  
AND CONNECTION TO NATURE





## **2030 Strategy is centered on five strategic and interconnected goals:**

- Urgently protect land
- Restore and care for Niagara Escarpment land
- Enhance the Bruce Trail experience
- Inspire generosity
- Support people and culture







*“This bold strategy will enable the Bruce Trail Conservancy to be a global leader in conservation, the steward of a world-class trail system, and a people-powered organization filled with diverse individuals who share their talents and generosity to make it all happen.”*

Michael McDonald, CEO



# Increasing engagement through a broader communication model

**OLD MODEL**



**CURRENT MODEL**



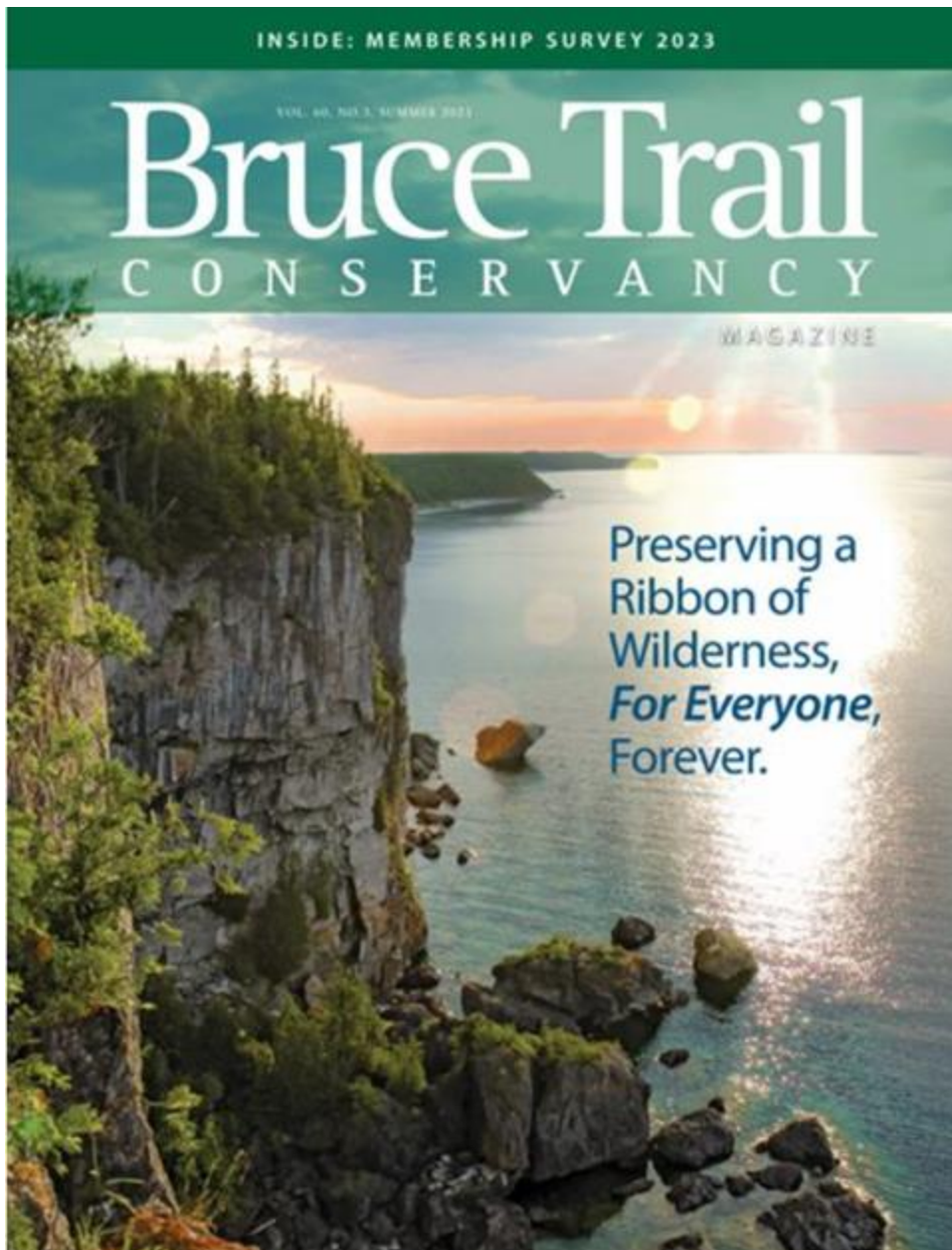


# Indigenous Healing Gardens





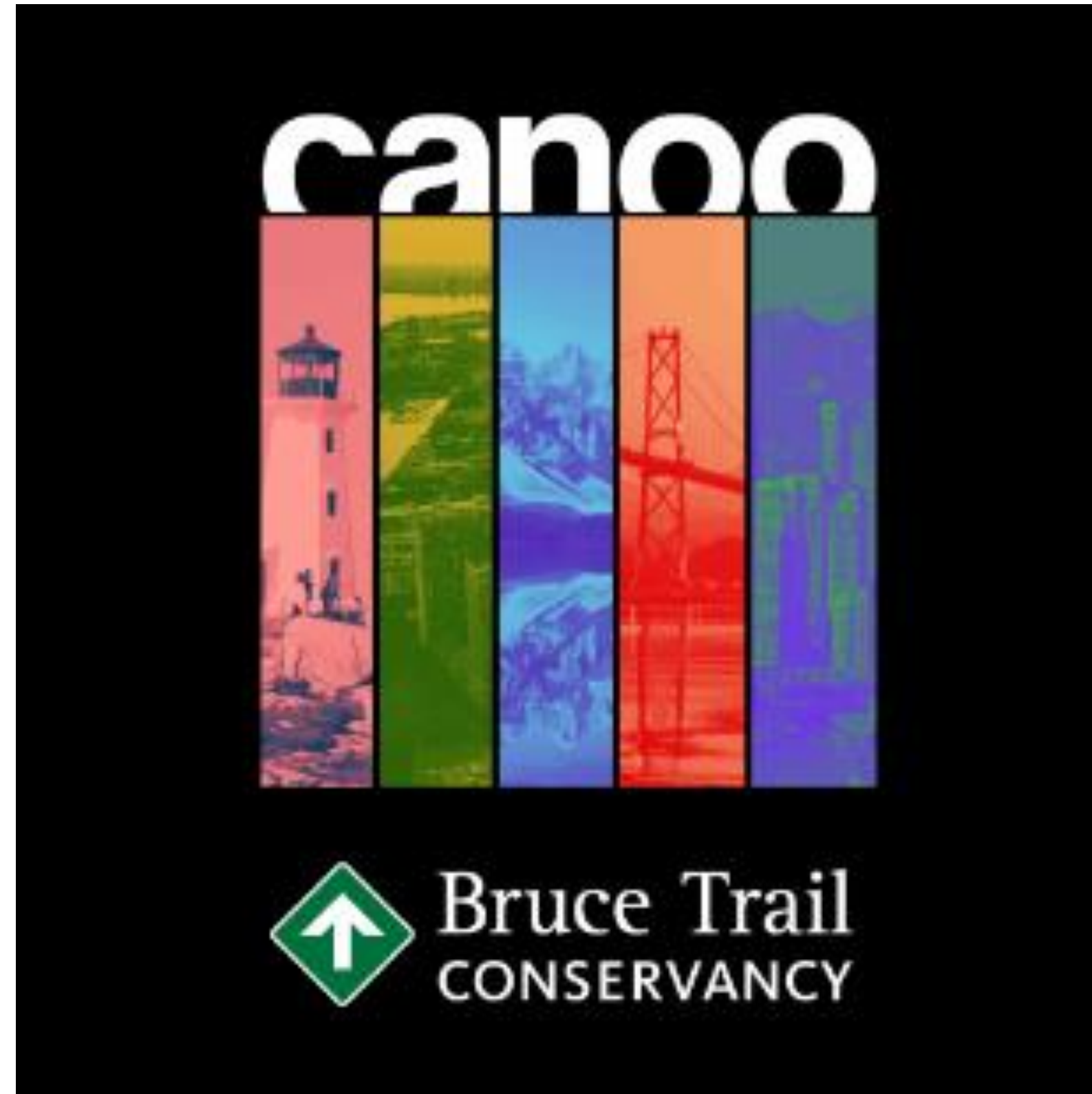
# Committed to Diversity Equity and Inclusion



## FEATURES

- 9 Connect with the Bruce Trail Conservancy at Pride
- 10 The Power of One
- 13 Indigenous Healing Gardens
- 14 Supporting Gender Diversity on the Trail and Beyond
- 17 Giving Invasive Species the Boot with Baffin
- 18 Restoration by Fire
- 24 Proposed New Bruce Trail Conservancy By-laws







## Toronto Pride

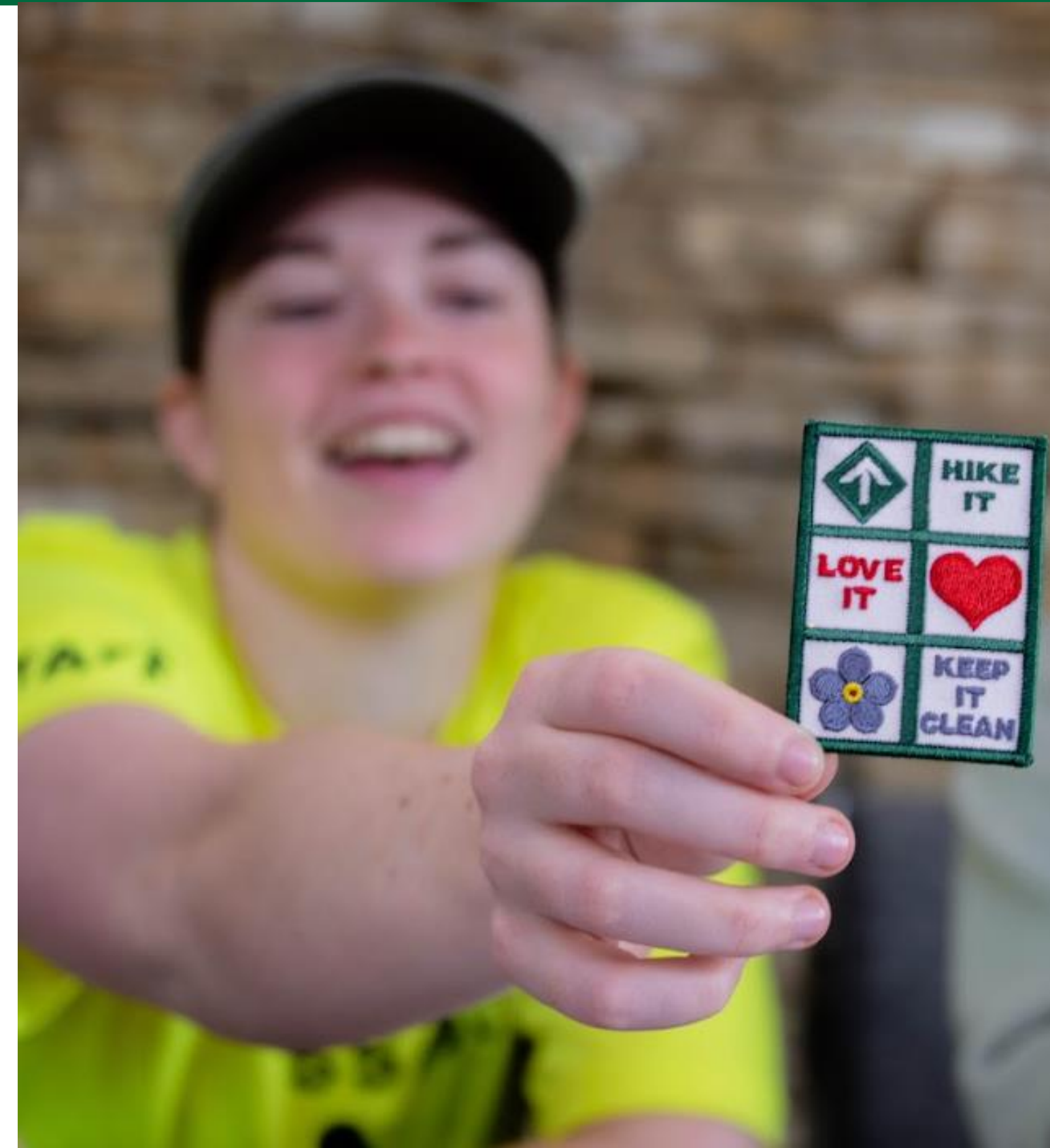
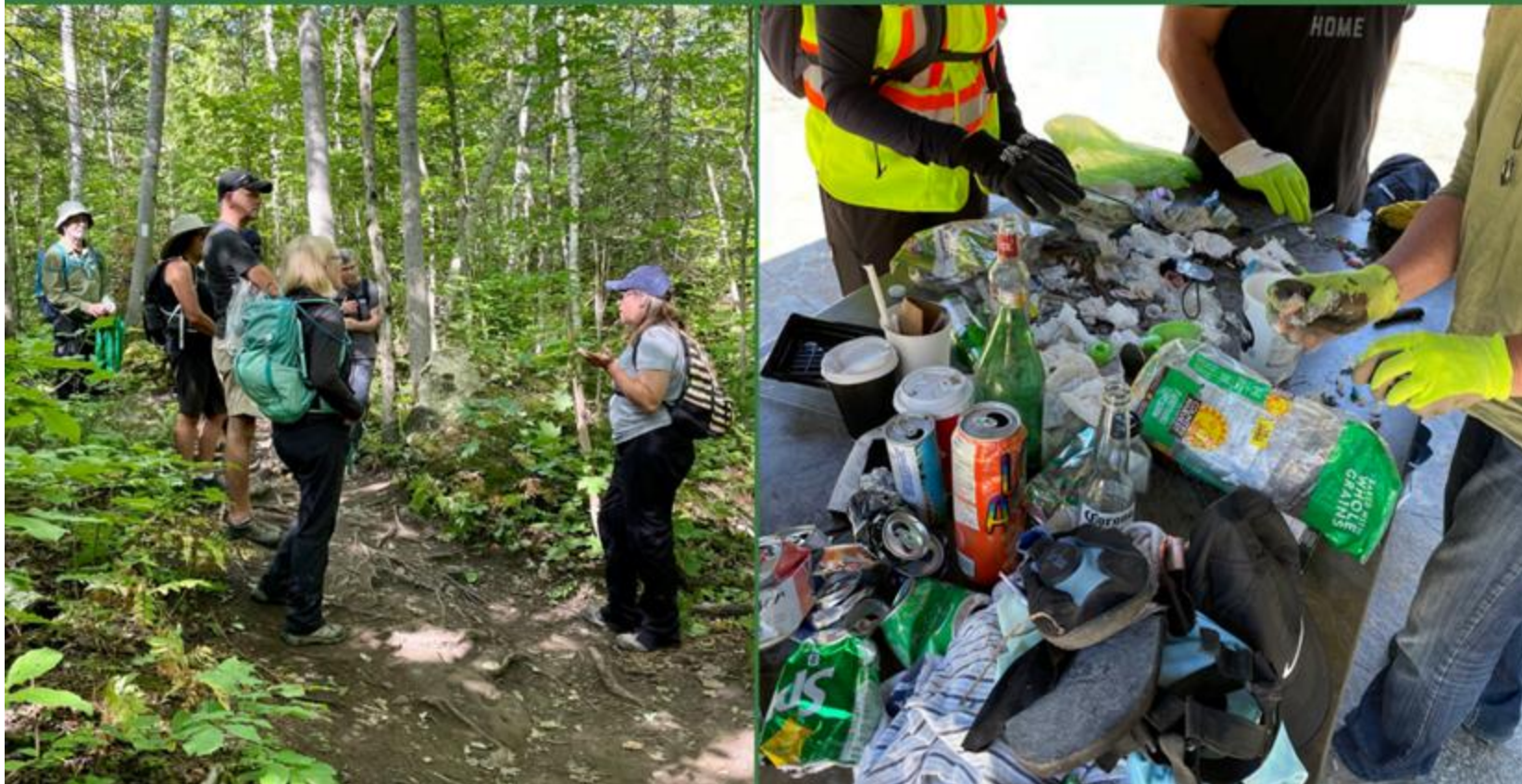




# Hike It, Love It, Keep It Clean

2022 Hike It! Love It! Keep It Clean! Project!

You are making a real positive difference on  
the Trail and in the environment.



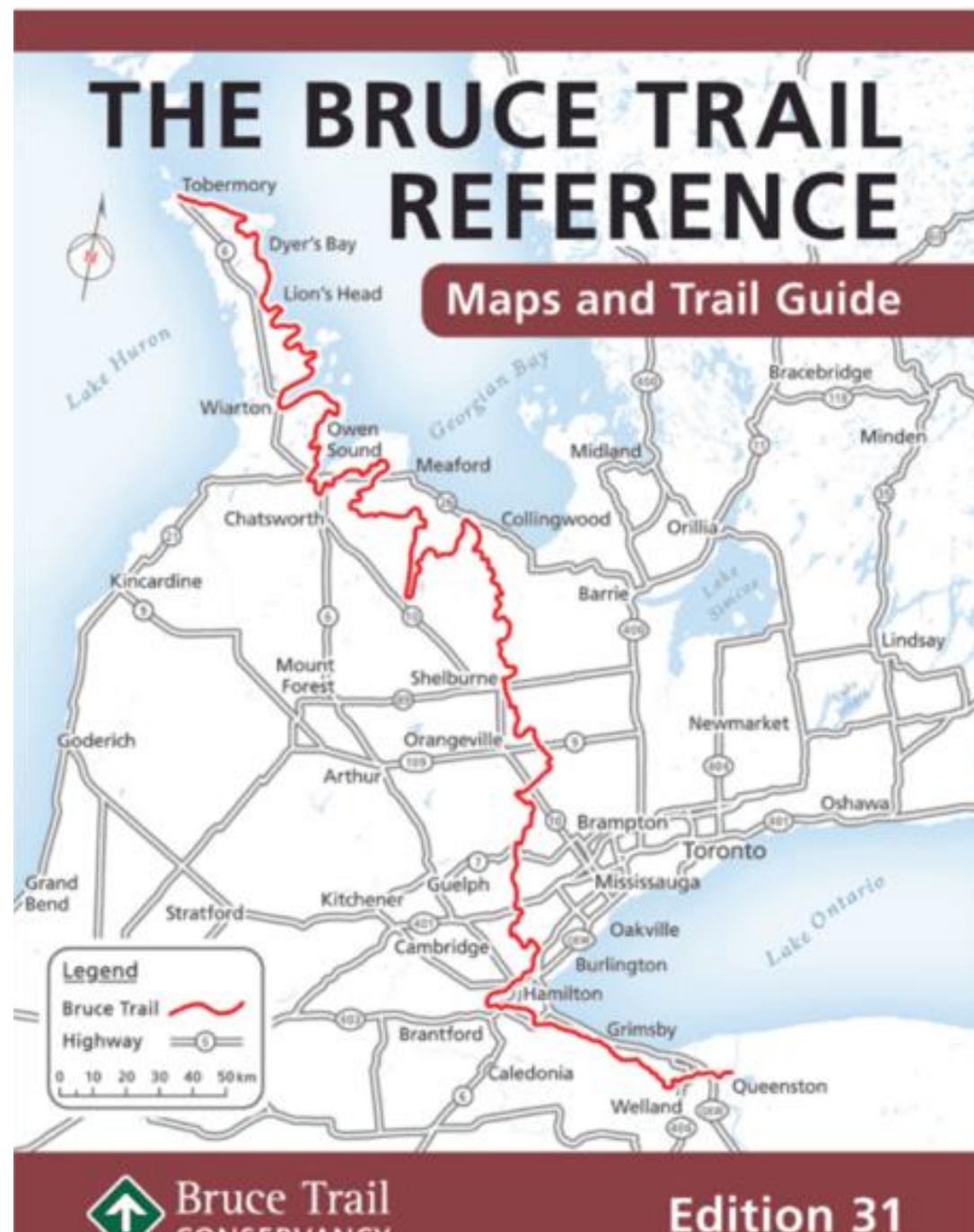


## Seed Orchards





# Bruce Trail Experience

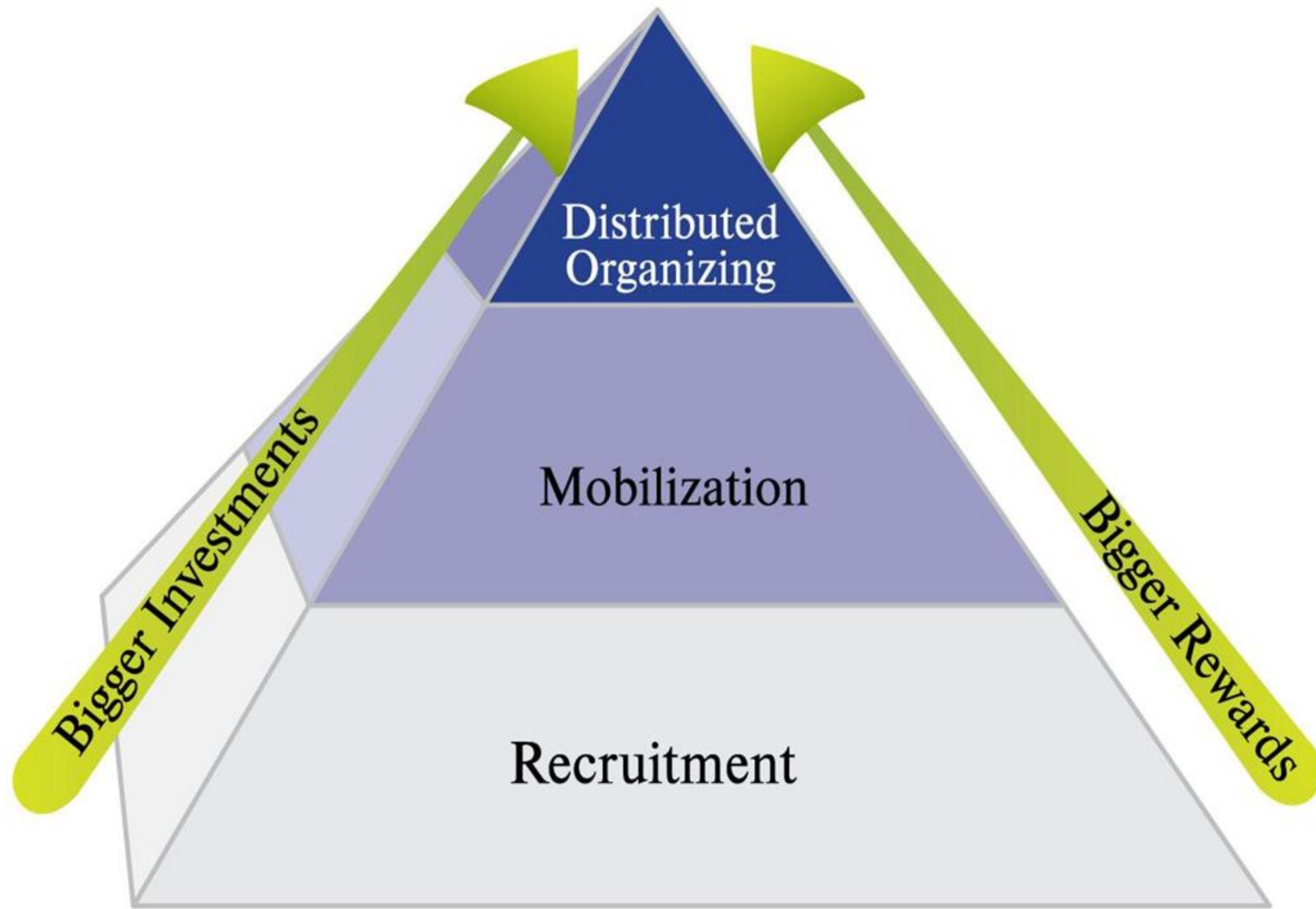




Thank you





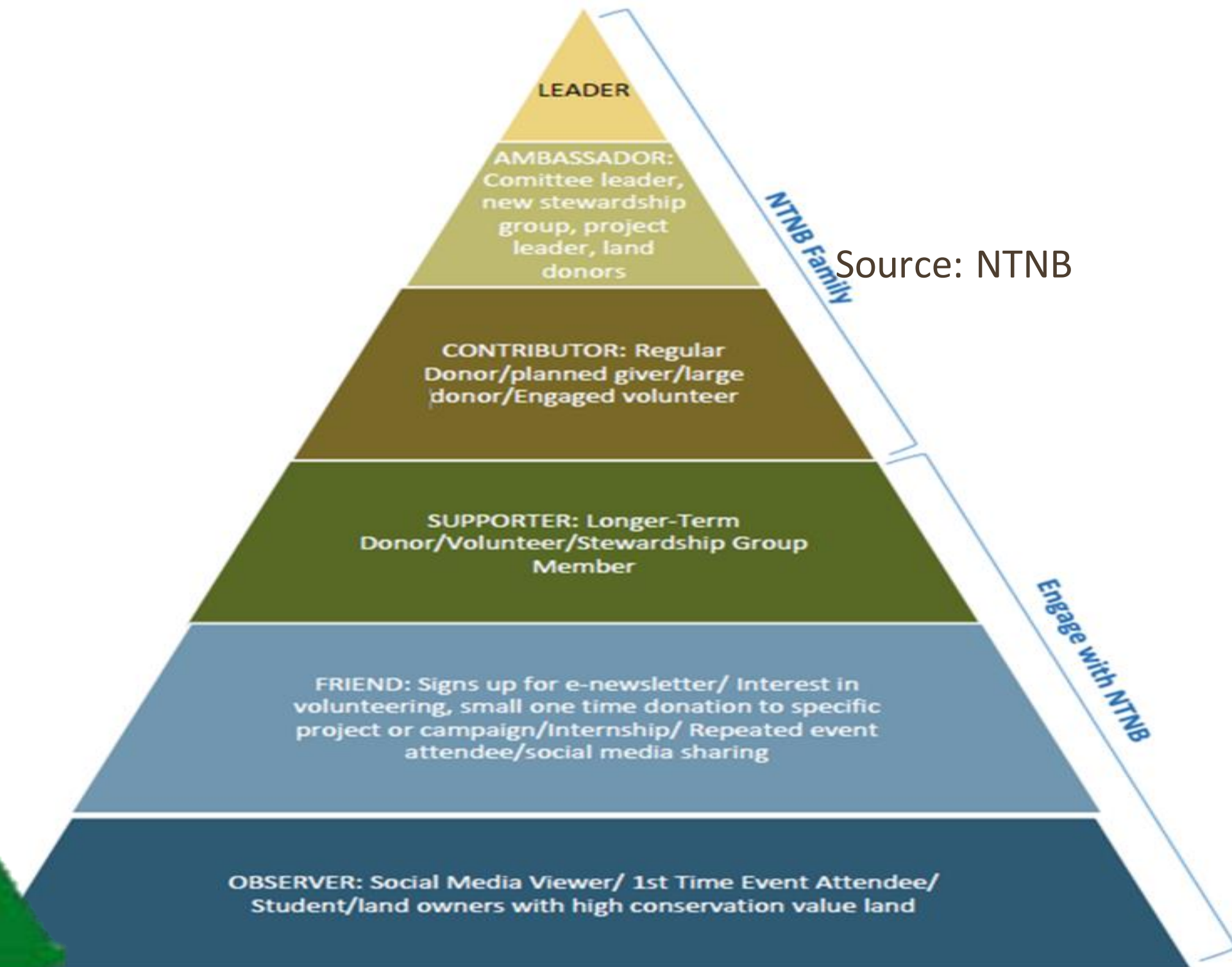


# ENGAGEMENT PYRAMIDS AND PATHS

Source: Matt Price



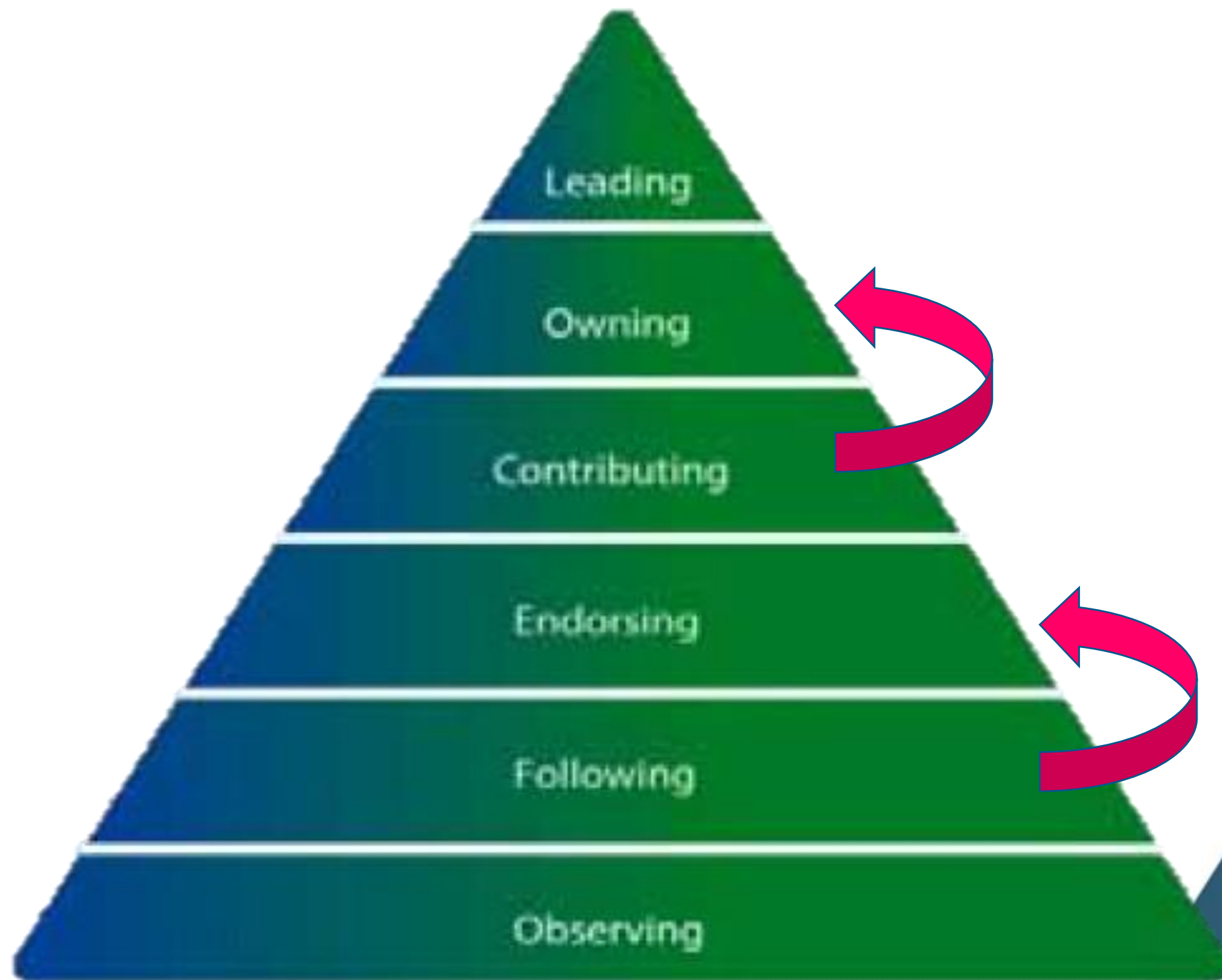
# Pyramids



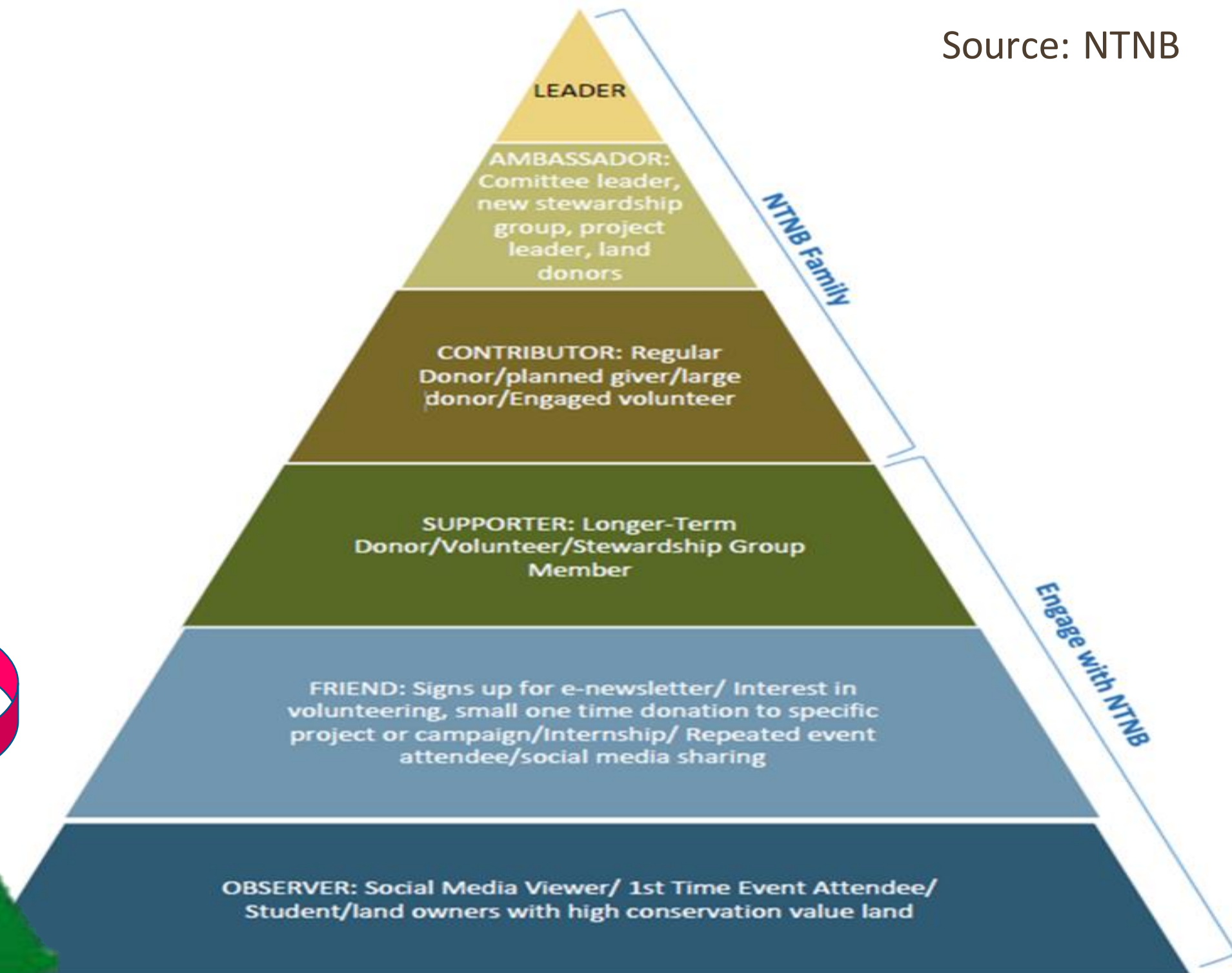
Source: NTNB



# Pathways



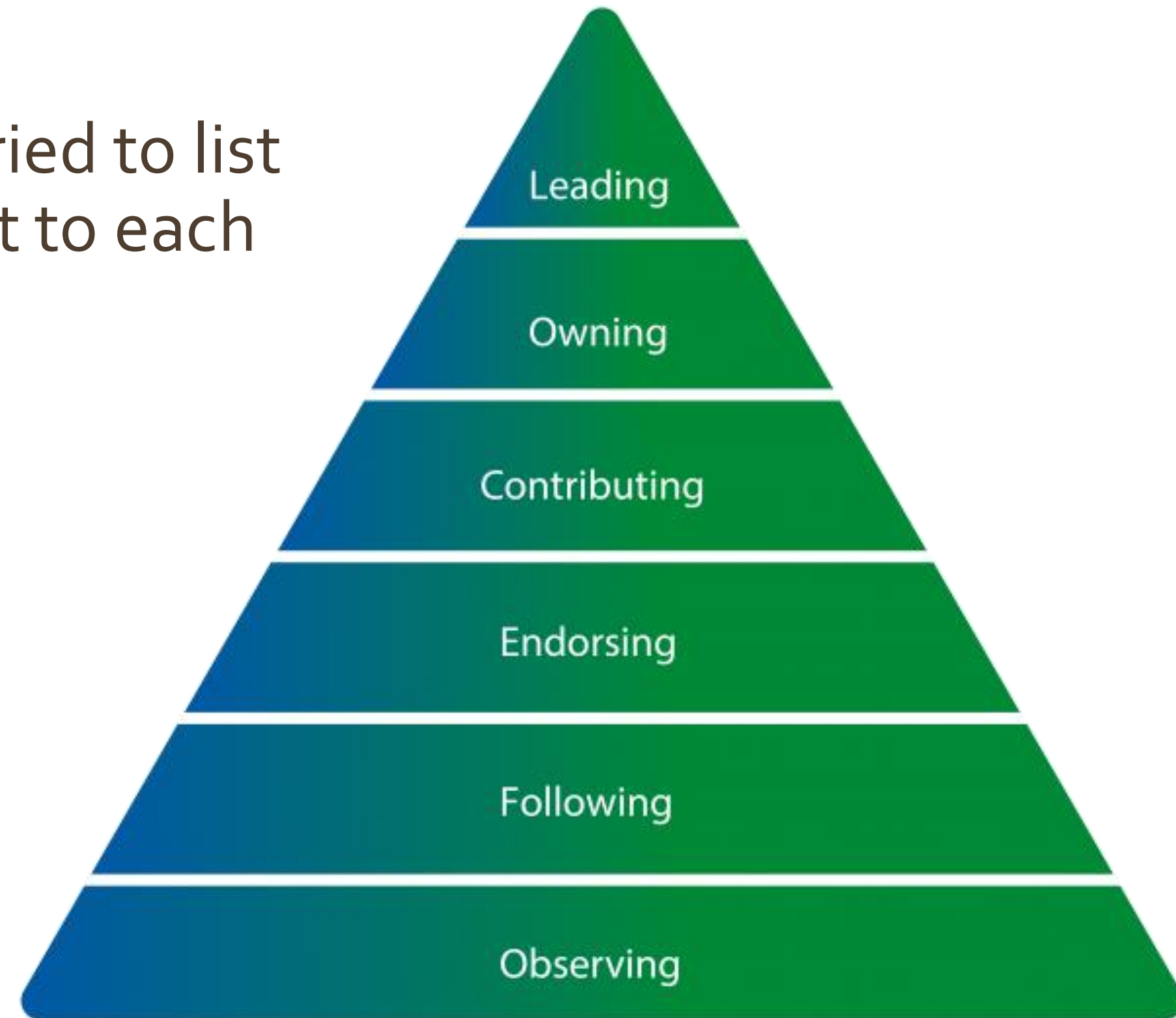
Source: NTN





# TTLT Pyramid(s)

- Started with blank excel and tried to list different groups of people next to each heading
- Volunteer vs Donor
- So..two pyramids

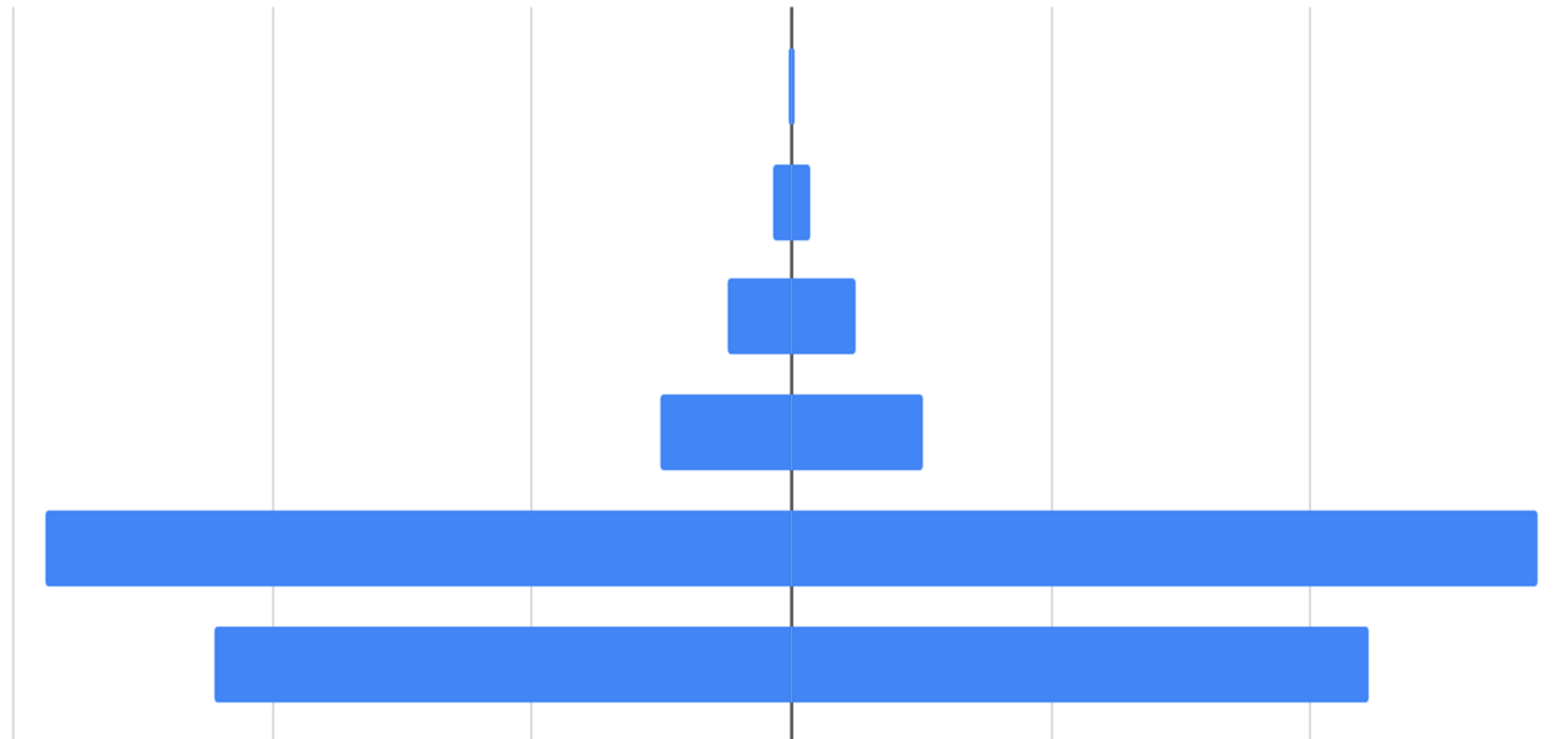




# TTLT Pyramid(s)

- Volunteer pyramid attempt not exactly a pyramid...

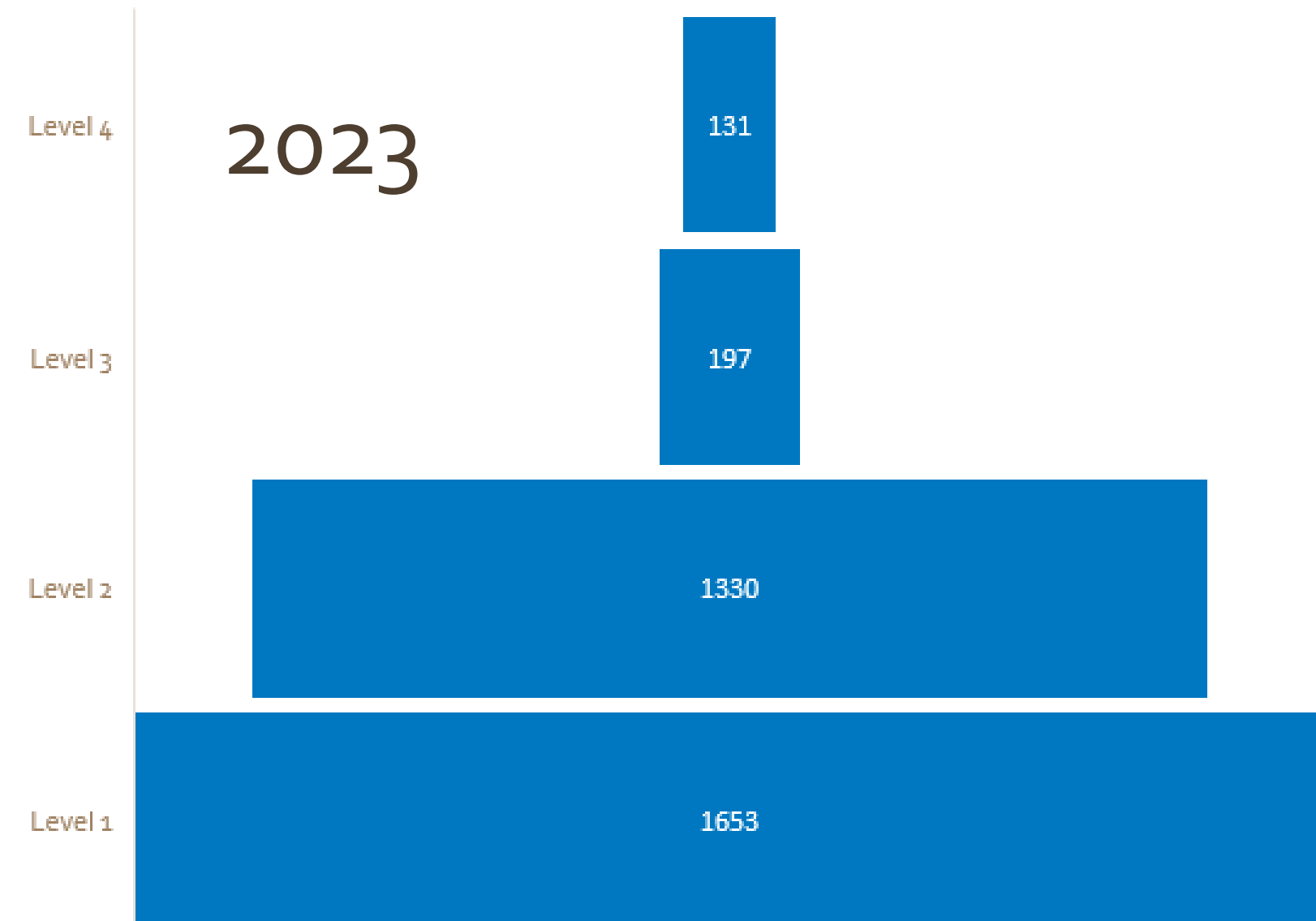
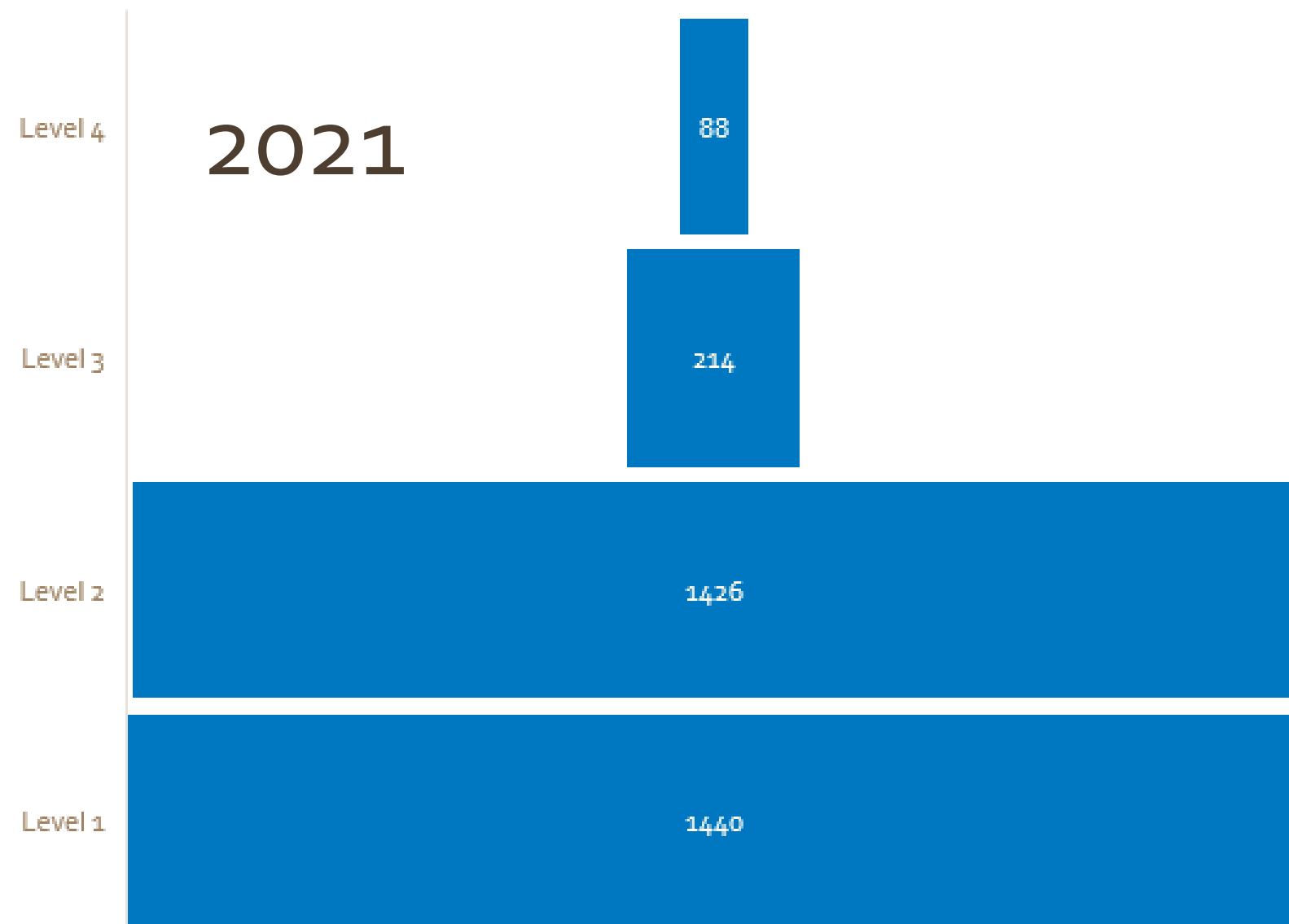
Leaders	9
Owners	72
Contributors	246
Endorsers	504
Followers	2871
Observers	2222





# TTLT Pyramid(s)

- Four level donor pyramid integrated into fundraising strategy
- Tracking in our database (NationBuilder)





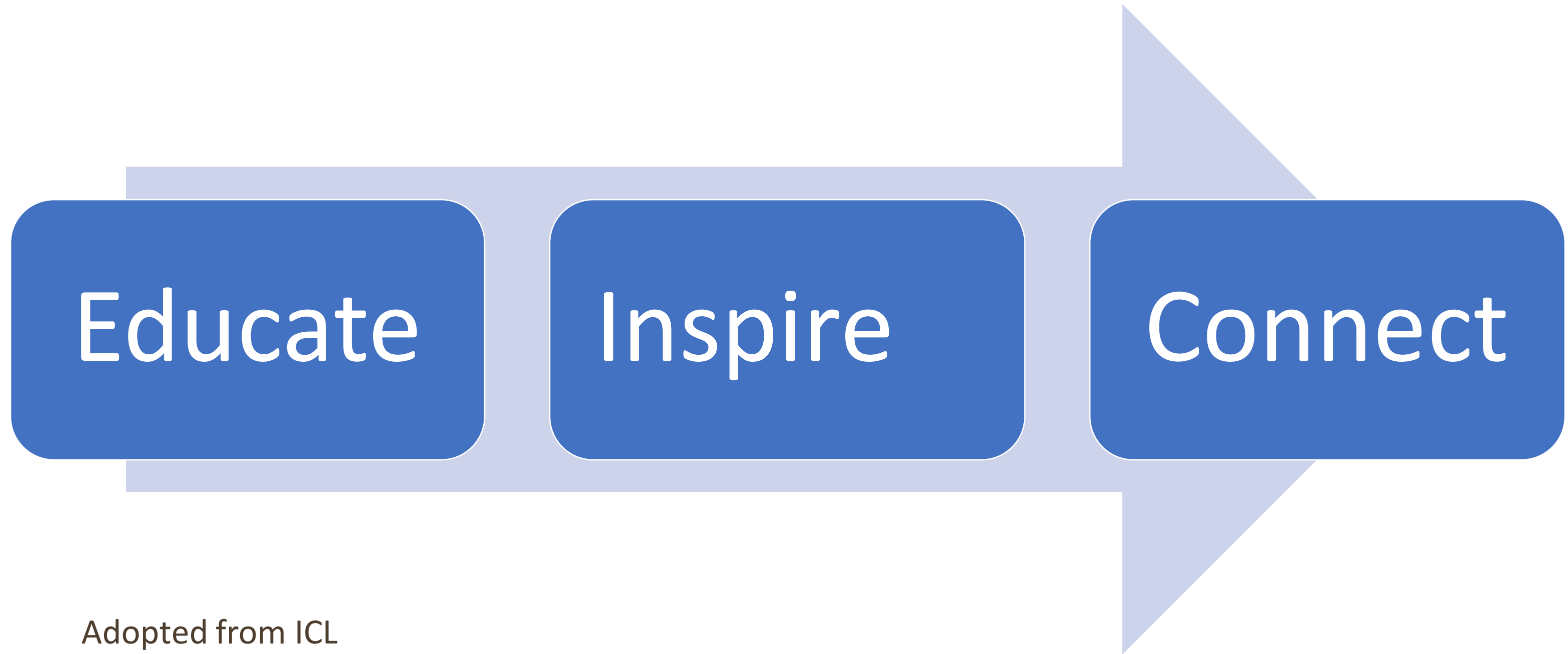
# Find your people (Recruitment)

Who are your people? How do you find them?





# Find your people (Recruitment)



Adopted from ICL



# Find your people (Recruitment)

## Meet people where they're at

- Community events – Seedy Saturday, Earth Day festivals, climate action events, etc.
- Social media
- Webinars during pandemic were great!





# Find your people (Recruitment)

Create diverse “touchpoints” or opportunities to engage

- Offer in-person and online events
- Passport to Nature, other educational programs and events
- Give people a reason to engage - call to action

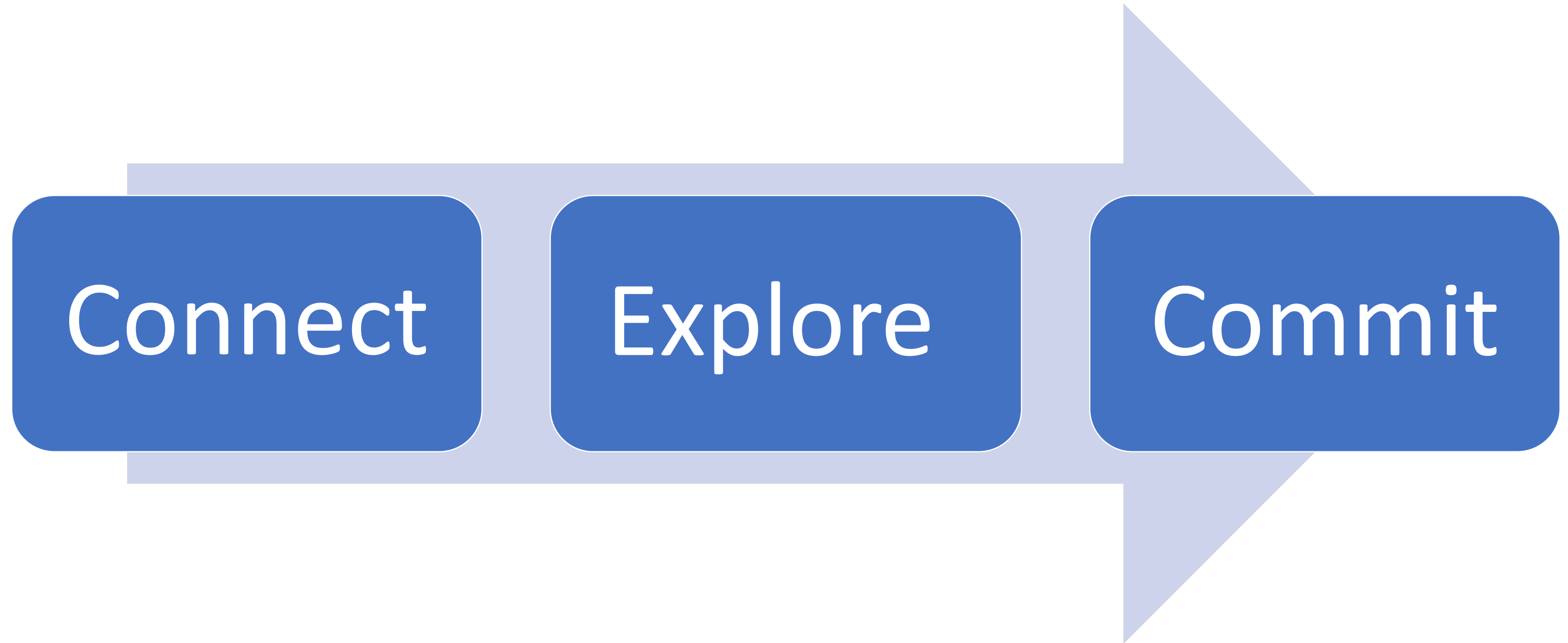
**Ability to contact people is key. If you can't contact them, they don't exist.**

**Ask for contact info every time!**





# Mobilization - Relationship Building



Adopted from ICL



# Mobilization - Engagement Pathways

- Ladder/pathway between pyramid levels
- Asking folks to make a bigger commitment - building a relationship
- Diverse is better
- Systematic and data driven





# Mobilization - Engagement Pathways

**Tracking is key. Track everything:**

- Events attended
- Volunteer contributions
- Petitions signed
- Posts they liked
- Donations
- Asks
- Thank yous
- Contact (emails, phone calls)





# Mobilization - Engagement Pathways

**Tracking is key. Track everything:**

- Events attended
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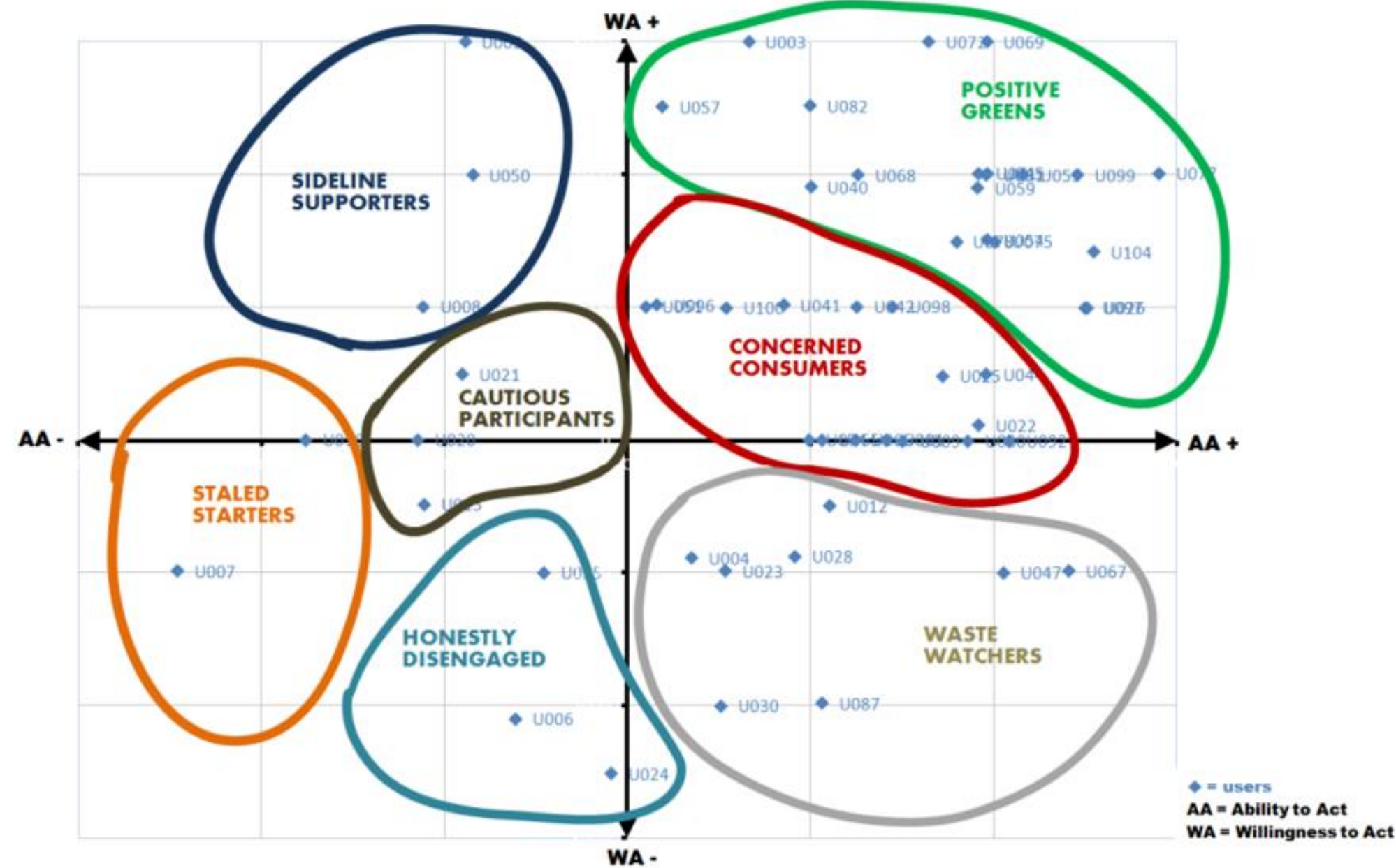


**Identify the right people for asks**

**Make appropriate asks**

**Supporter stewardship**

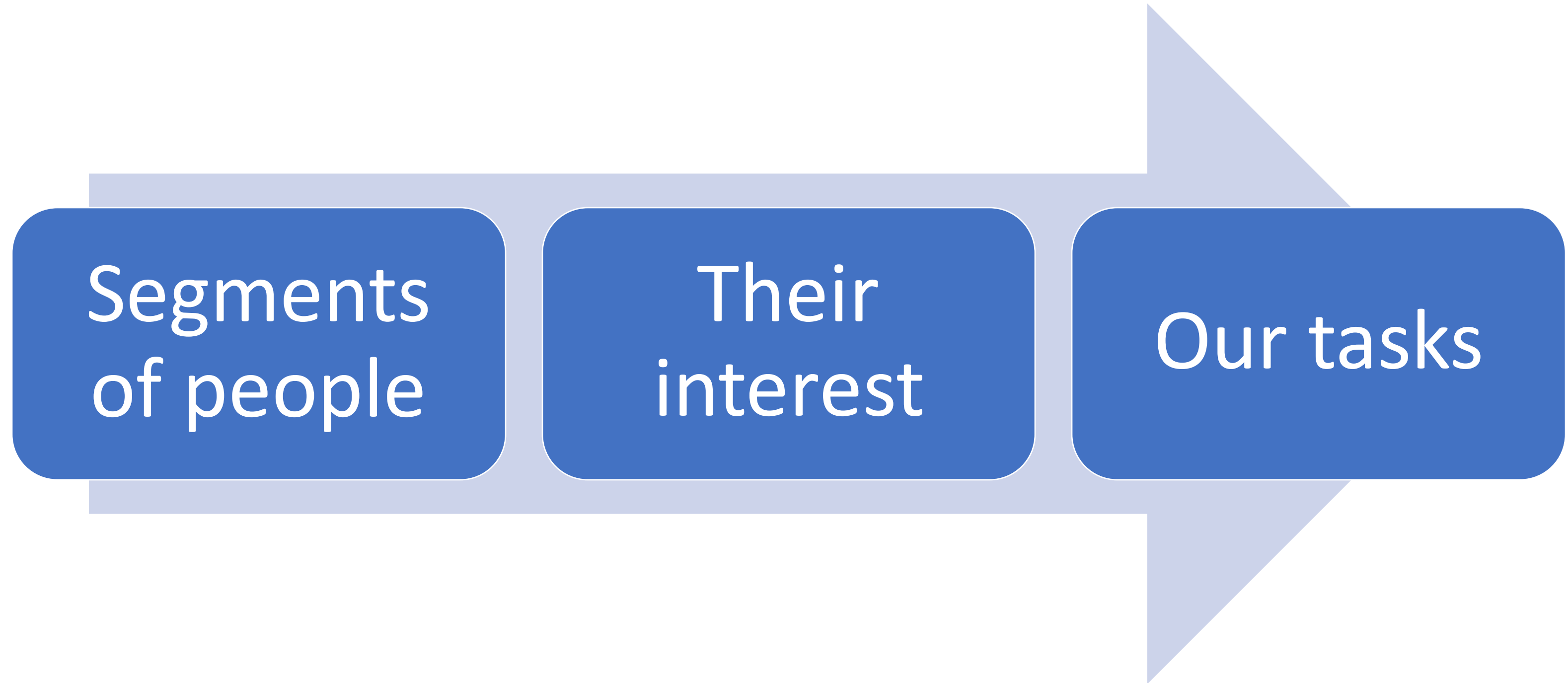
# Mobilization - Engagement Pathways



**Segmentation:  
Send tailored  
messages**



# Mobilization - Engagement Pathways



# Mobilization - Engagement Pathways

Attend a  
meeting

Sign a  
petition

Come to  
an event

Make a  
donation

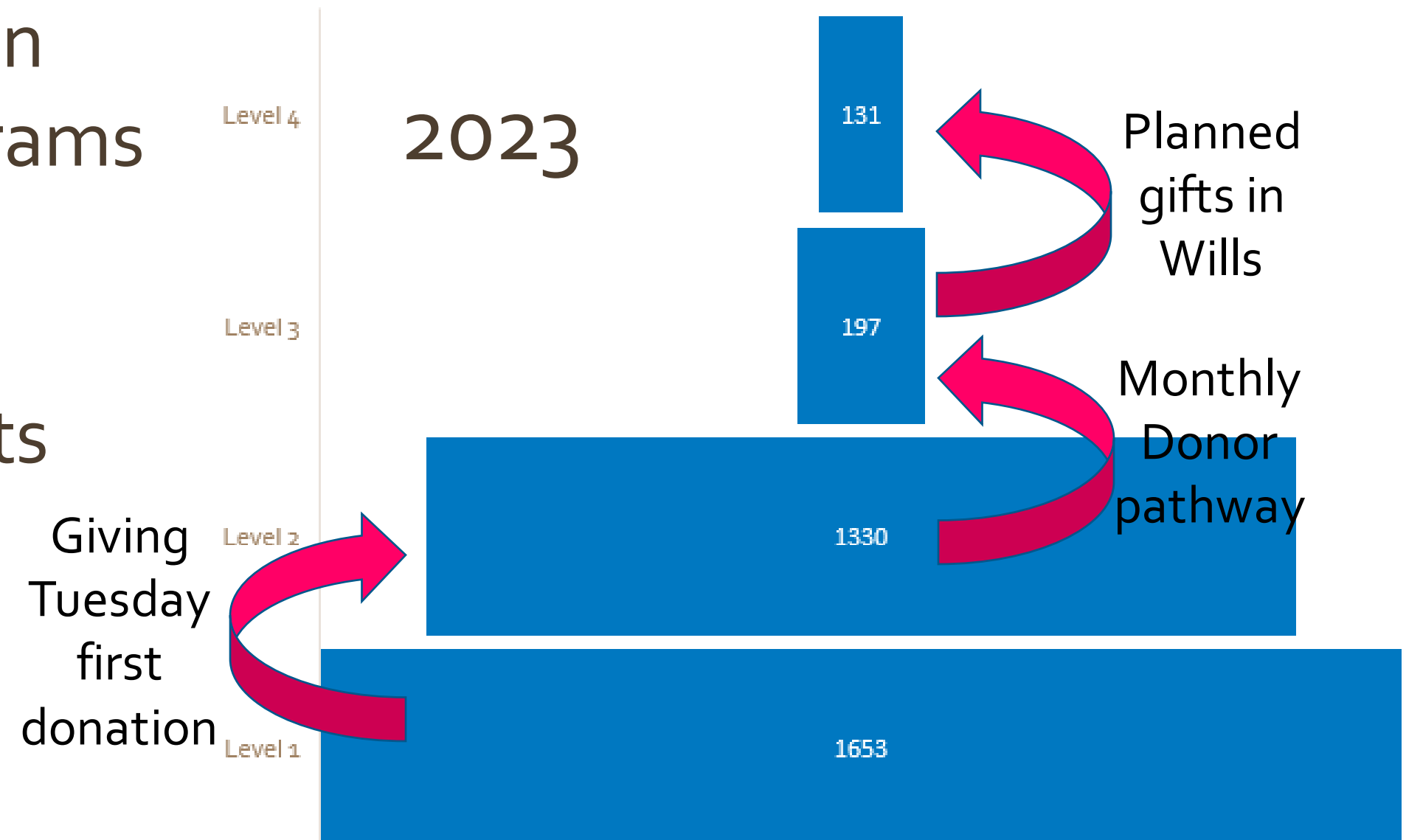
Stuff  
envelopes

Steward  
land



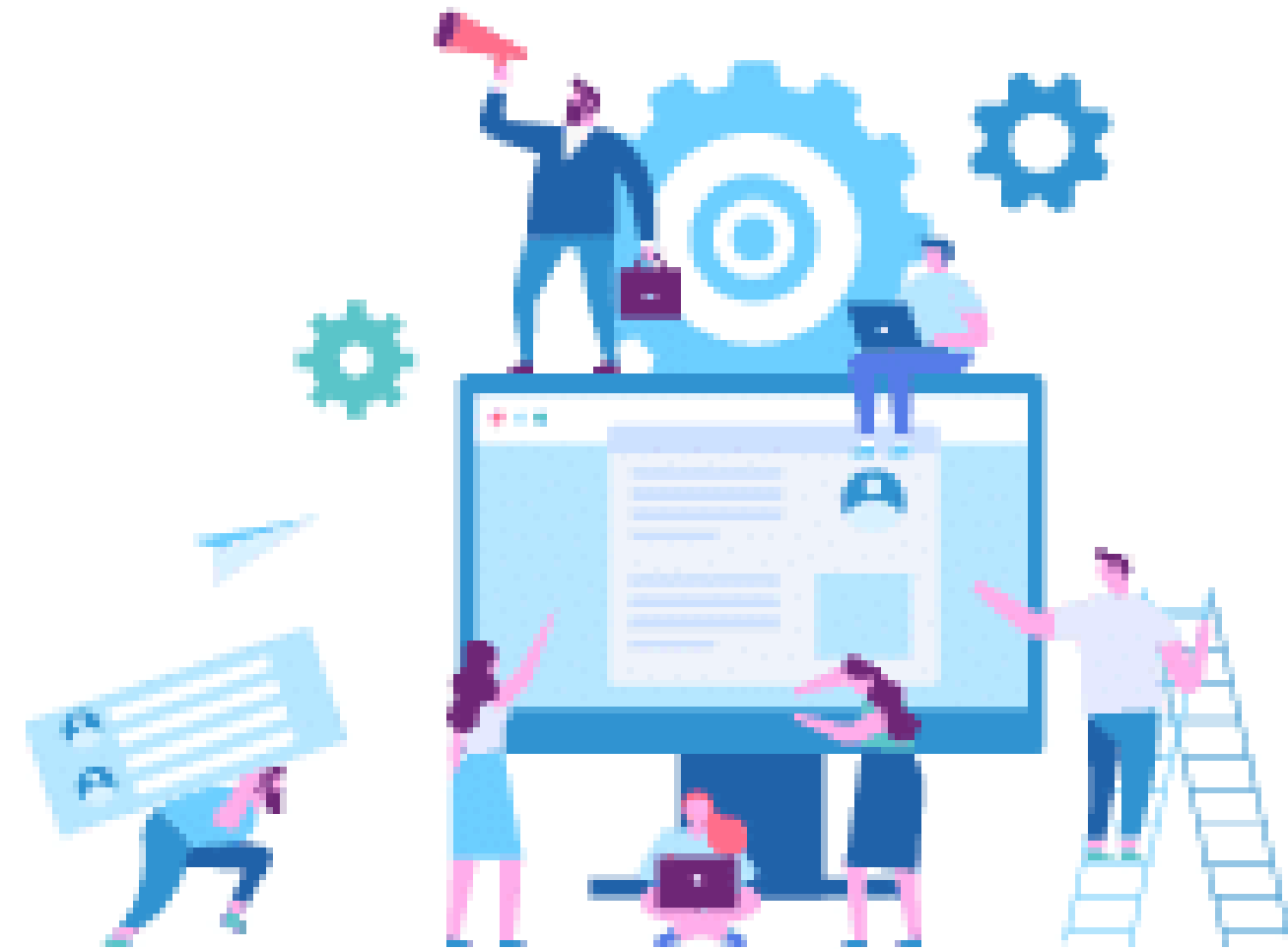
# Mobilization - Engagement Pathways

- Monthly giving campaign
- Giving Tuesday campaign
- Volunteer training programs
- Petition or advocacy campaign
- Major Gifts, Planned Gifts



# Create teams, surface new leaders

- Small teams of 4-12 people function best
- Teams should have a goal but be allowed to develop their own methods and processes
- Over time, some people will emerge as leaders
- Leaders can help with recruiting, training, and managing other volunteers





# Distributed Leadership - Snowflake Model

- Sustainable management ratios
- Shared goals and responsibility
- Mutual accountability
- Scaleable and capacity for exponential growth



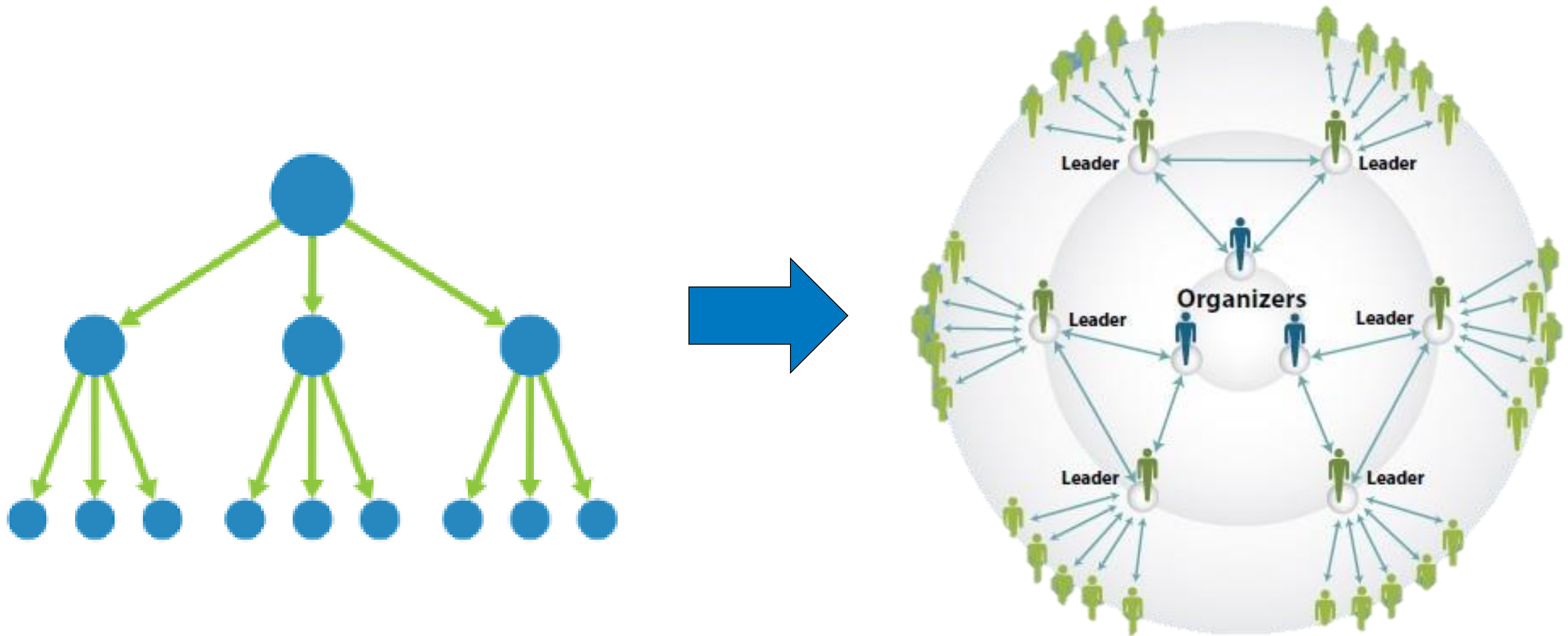
# Distributed Leadership - Snowflake Model

- Provides structure but allows autonomy
- Allows leaders to emerge
- Clearly defined roles & responsibilities, allows for different levels of commitment
- A team of 3 organizers can become a team of 38 people





# Rethink Leadership



# Rethink Leadership

- How many people can one person manage?
- What is considered success in leadership?
- What is the bigger problem in your organization:
  - not enough volunteers? or
  - not enough capacity to manage volunteers?
- Great organizers realize the potential of sharing leadership





# Distributed Leadership

- Expand your organization
- Empower volunteers
- Build capacity





# TTLT experience

- EO is embedded throughout our organization
- Strategic Plan
- Organizational structure
- Organizational culture



- We “think” in pyramids and distributed leadership in everything we do



# Successes – Volunteer Engagement

- Improvement in recruitment and onboarding, communications

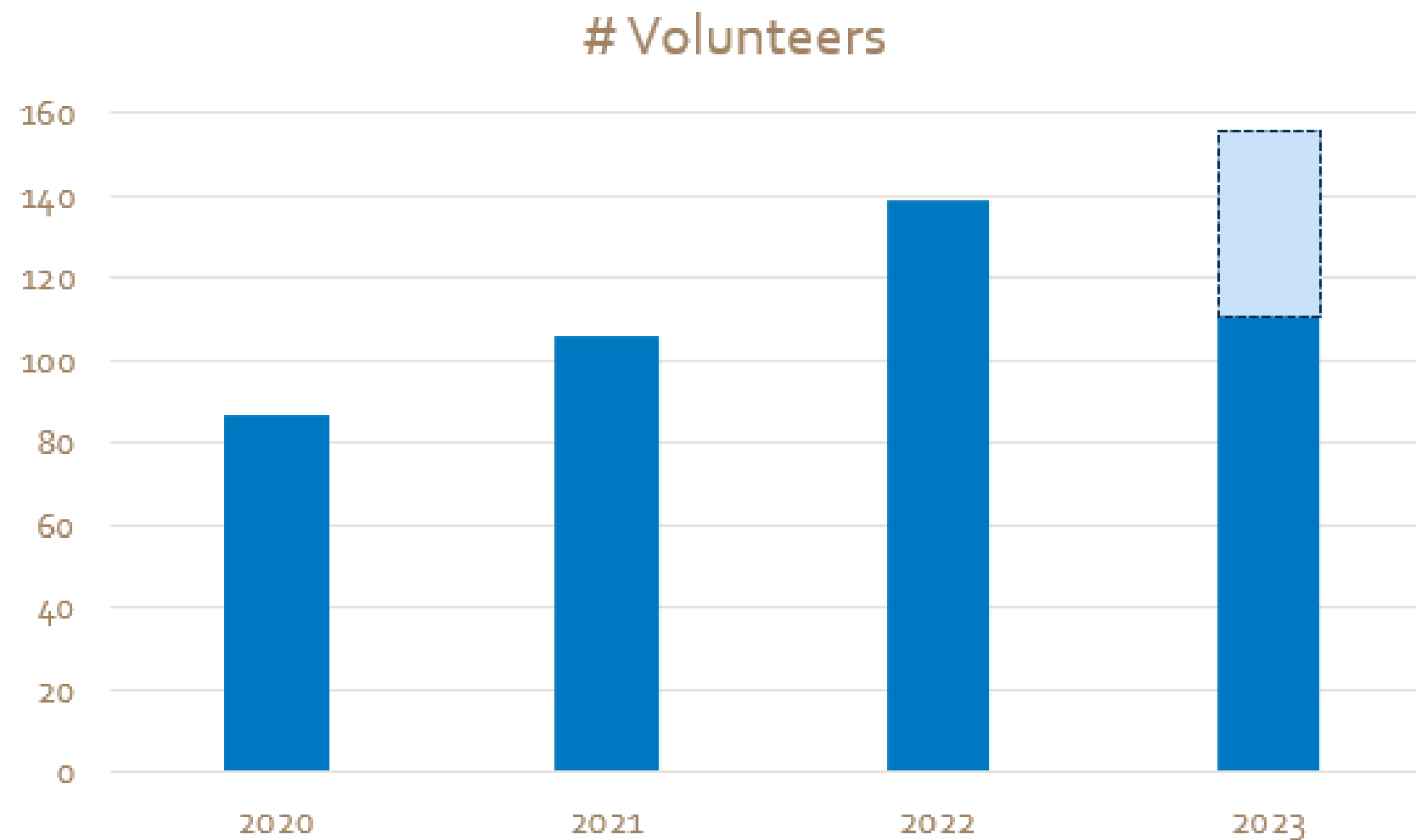


Photo TTLT staff



# Challenges – Volunteer Engagement

- Need more training resources
- Moving volunteer to higher levels of engagement – distributed leadership

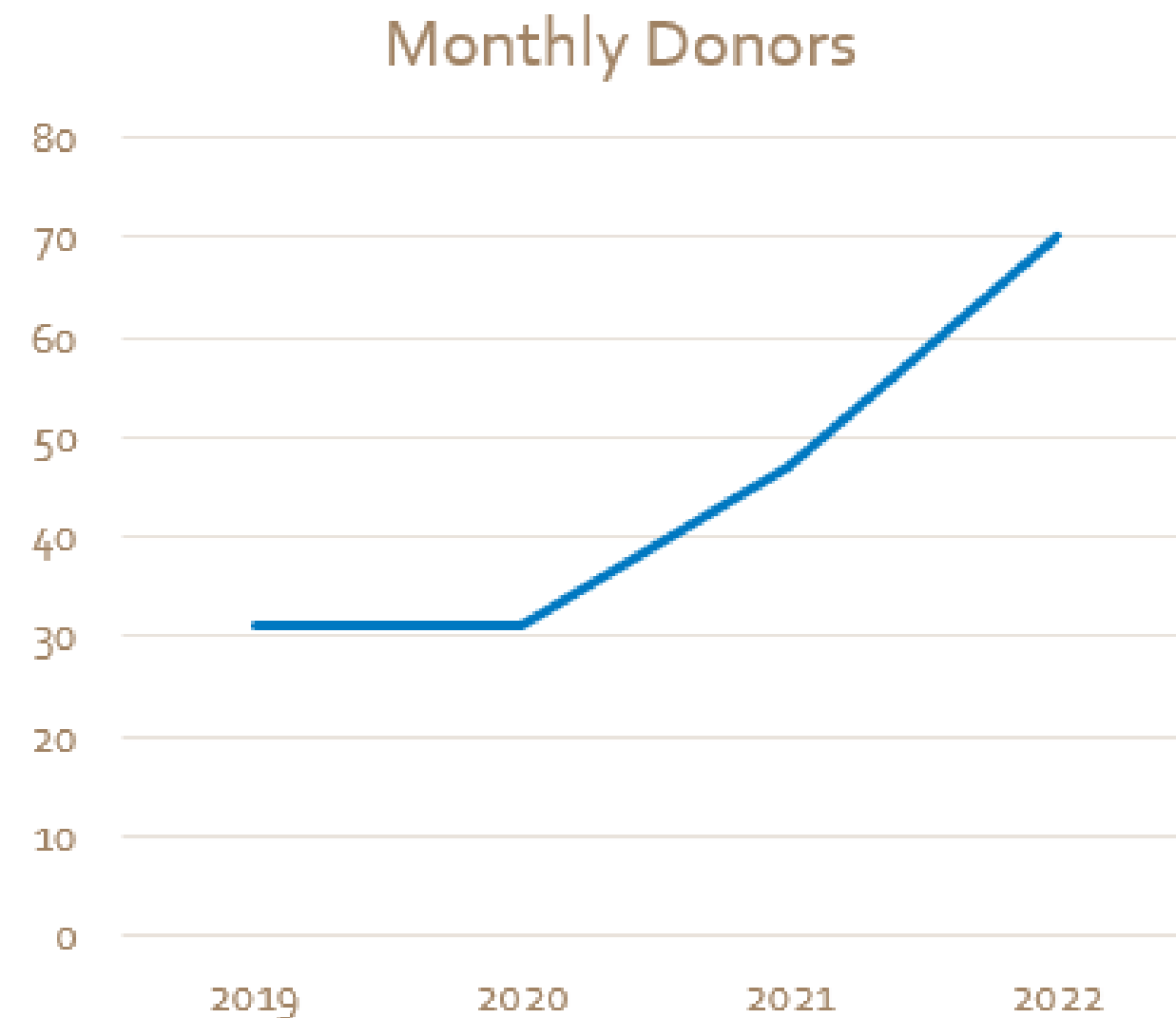
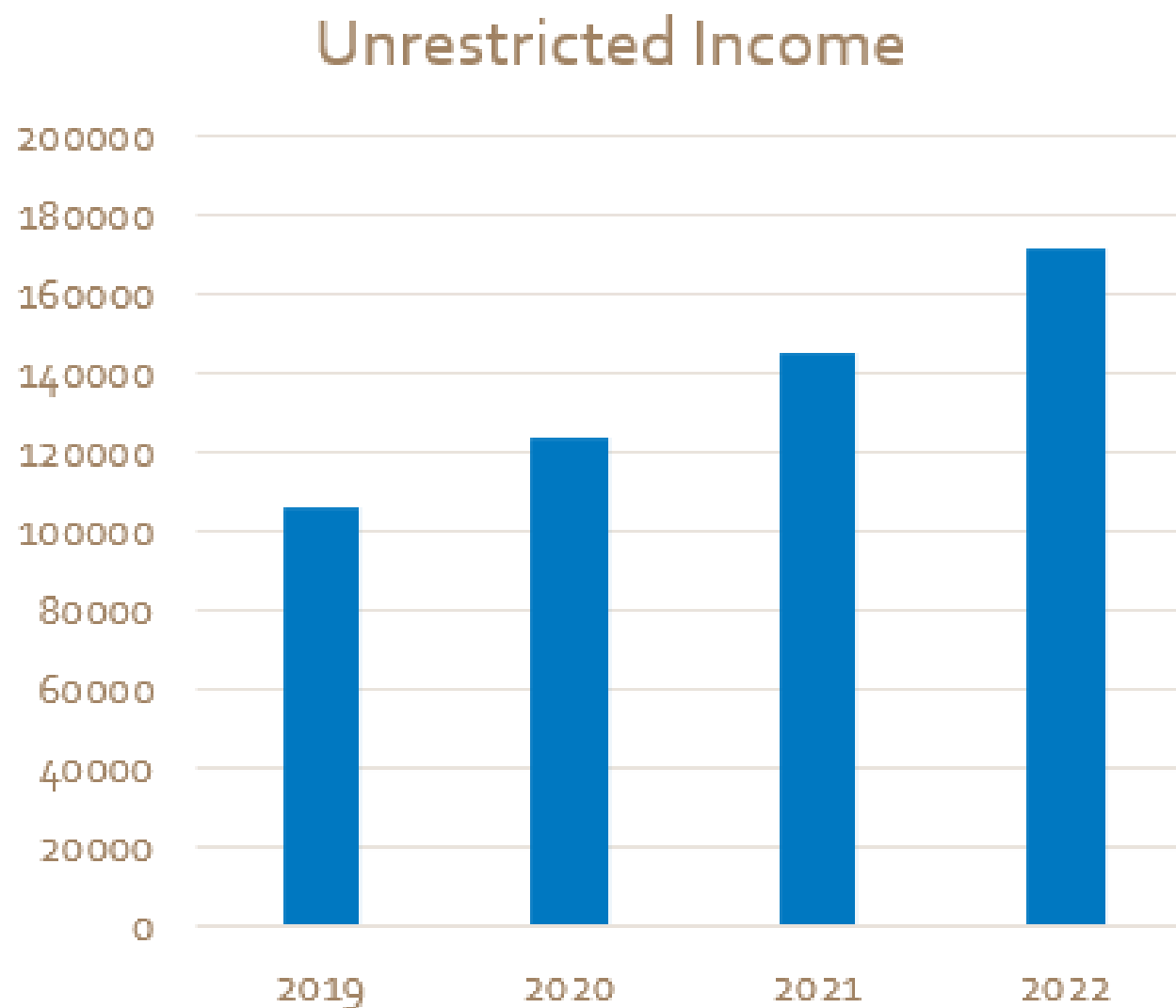


Photo Scott Gillingwater



# Successes – Donor Engagement

- Improved donor stewardship and communications



# Challenges – Donor Engagement

- Engagement with non-digital supporters
- Navigating expectations



Photo <https://elearningindustry.com/>



# TTLT Experience

- TTLT has become a more people focused organization
- Embedding EO into everything!
- Using storytelling and targeted communications



Photo Rebecca Launchbury



Photo Mhairi McFarlane

# **Distributed Leadership BTC Land Stewardship Program**



# Bruce Trail Clubs

- There are nine Bruce Trail Clubs, each corresponding to a section of the Bruce Trail
- Each Club is a unincorporated entity entirely run by volunteers
- Clubs are responsible for maintaining, building and re-routing trail, stewarding land, working with local landowners, the hiking program, fundraising events and promoting the Bruce Trail and the BTC
- Clubs receive a portion of membership fees to finance their work



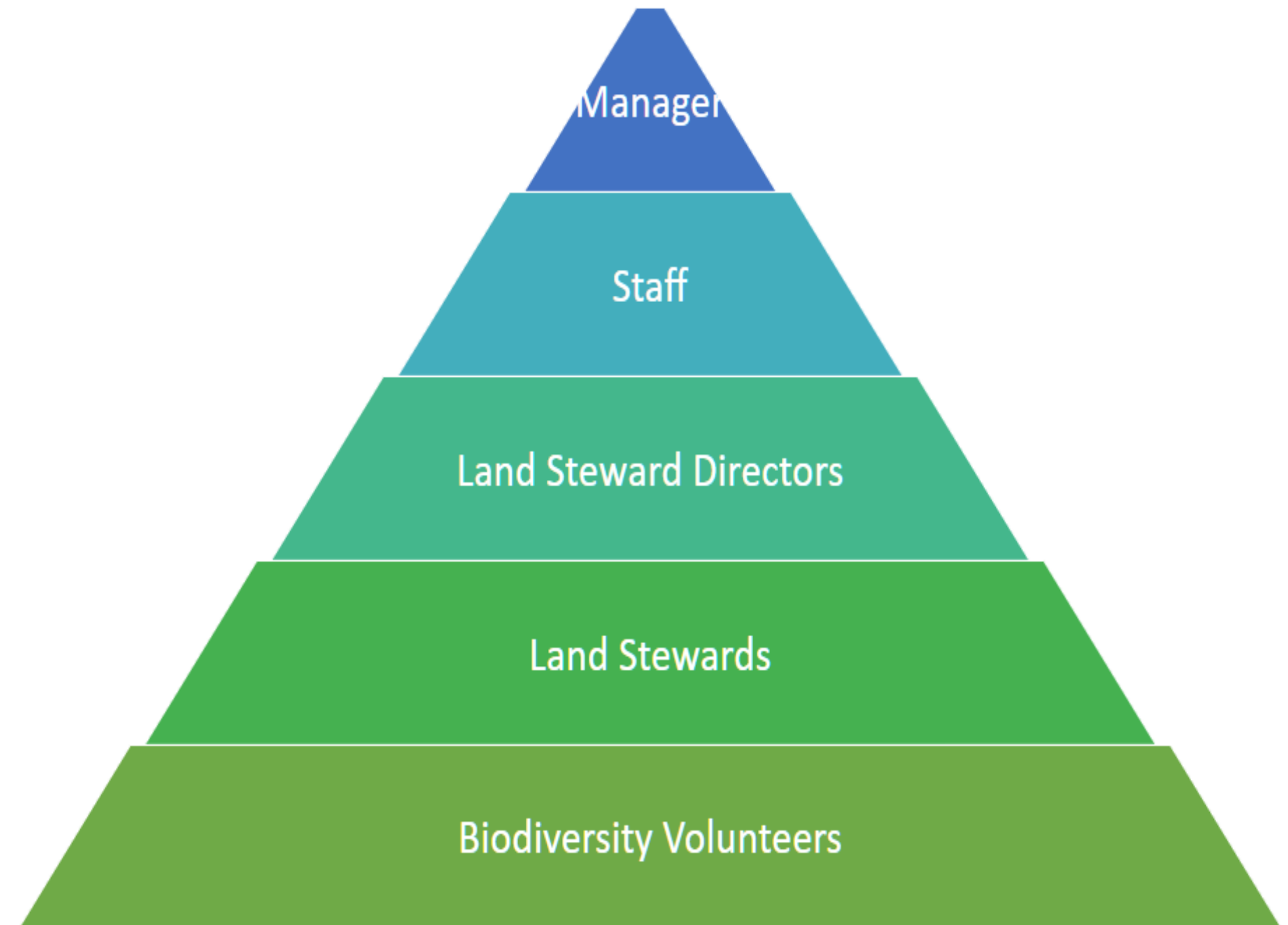
# Land Stewardship Program

## Staff:

- Manager of Conservation and Trail
- 2 Land Stewardship Coordinators and Ecologists
- Conservation Technician

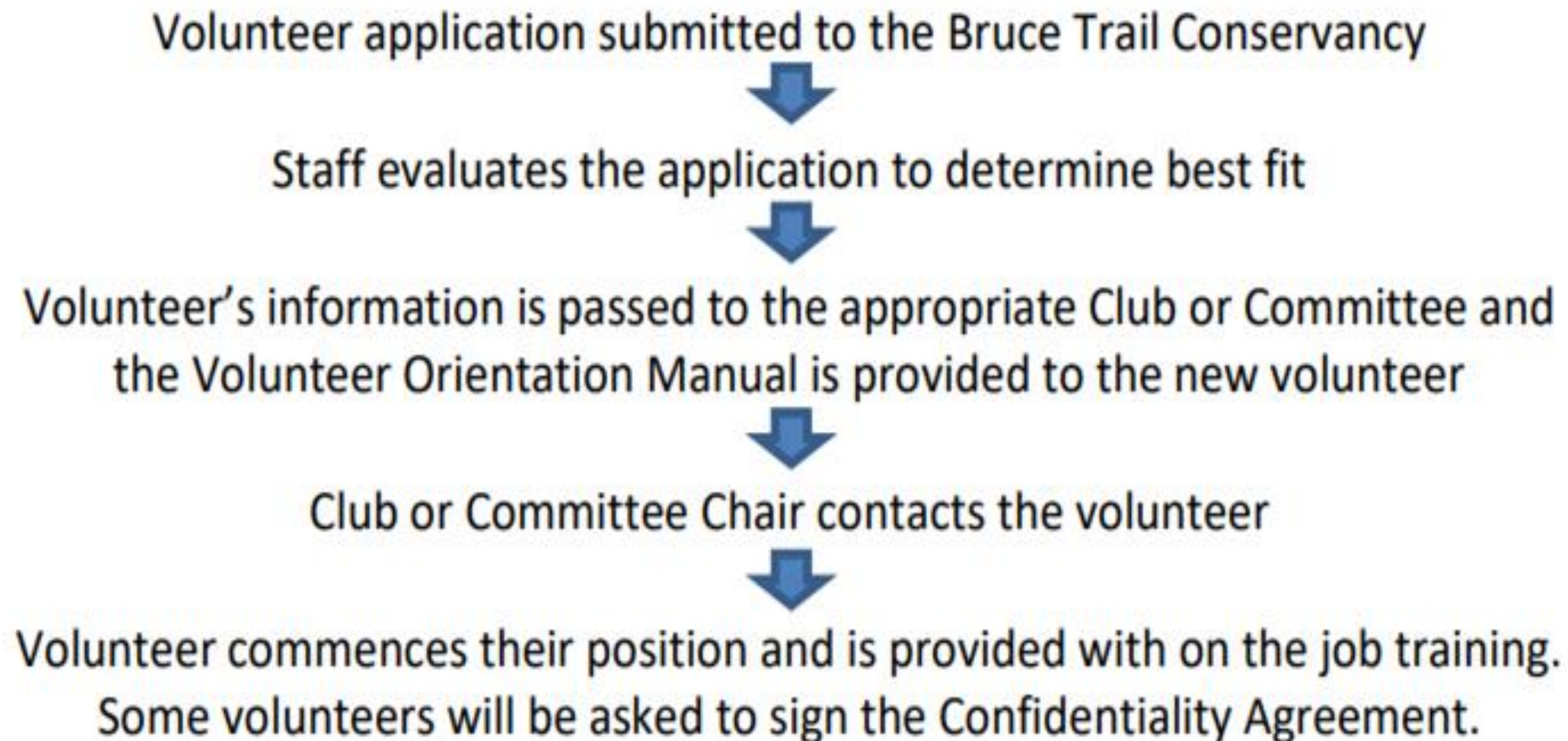
## Volunteers:

- 9 Land Steward Directors
- 275 Land Stewards – one or two per property
- Biodiversity Volunteers – help with projects on BTC owned properties





# Volunteer Process



# Training

- Peer to peer training provided by Land Stewardship Directors
- Annual workshops provided by BTC Staff to Land Stewards
  - Cover a variety of relevant topics
- Training manuals available on the BTC website
- Stewardship Plans – reports on each property that are provided to the Land Steward



## Annual Monitoring Reports

- Each year every Land Steward must complete their Annual Monitoring Report about the property under their care.
- These reports allow the Land Stewardship Directors and Staff to track any concerns on the property and any progress made on recommendations within the Stewardship Plan

## Risks

- Volunteer burnout is a real risk if there is a lack of support for the volunteers
- Loss of information
- Confidential information breach
- Poor communication

## Benefits

- Allows volunteers the freedom and support to care for the land
- Creates a sense of ownership
- Allows for more activities to be done
- Allows for the generation of more ideas
- Allows for the sharing of information



# DATABASES

One data source

Integration of data

Tracking of all data

Access by all in organization

Learn from your data



# DATABASES

Tracking people and information associated with your contacts

Segmenting groups of people

Targeting

Testing and evaluating



# DATABASES

Integrate new engagement organizing methods;

Act as an internal communication for staff, board members and volunteers;

Become a communication and marketing tool for supporters and volunteers;

Track all of your relationships and campaigns;

Are able to engage outside supporters (board members, volunteers)

Are compatible with the existing financial system; and

Are customizable to accommodate all needs of your organization.

# What **DATA** and **PROCESSES** can you track?

Simple Data

Mixed Data

Advanced Data  
Process





# SIMPLE DATA

- Tracking of core metrics – what do you want to know about your people, what are the interactions between staff and volunteers, who are the representatives of political ridings?
- List sizes
- Opening rate of newsletters
- Events and campaigns





# MIXED DATA

- Tracking retention rates or sustained or repeated activity
- Tracking of data that predicts more involvement in the future
- Tracking a progress





# ADVANCED DATA

- Show the outcome of activity or predict future actions
  - Did your volunteers recruited others
  - What are your relationships within the constituency
  - How many supporters contact targeted decision maker?
  - Etc...





Sage CRM



blackbaud





# TYPES OF SYSTEMS

AMS - ASSOCIATION MANAGEMENT SYSTEM

CRM - CUSTOMER RESOURCE MANAGEMENT

ERP - ENTERPRISE RESOURCE PLANNING

The diagram consists of three dark green rounded rectangular boxes arranged horizontally, each containing white text. Below these boxes is a light green arrow pointing to the right. The background is a light beige color with a faint, stylized image of a globe.

Data

Databases

Digital  
Environment





Digital  
Environment

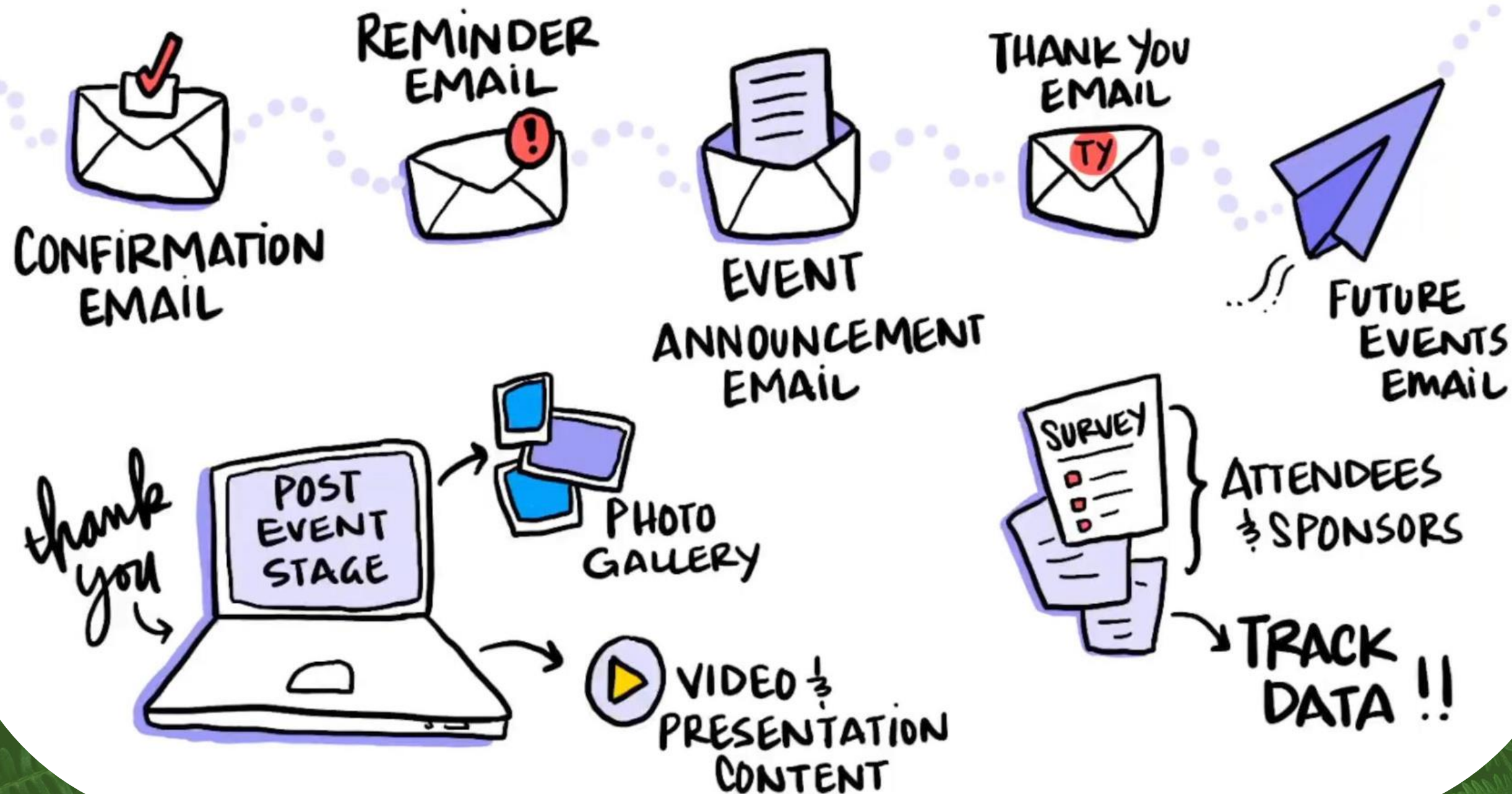
Digital  
Capacity

Digital  
Engagement

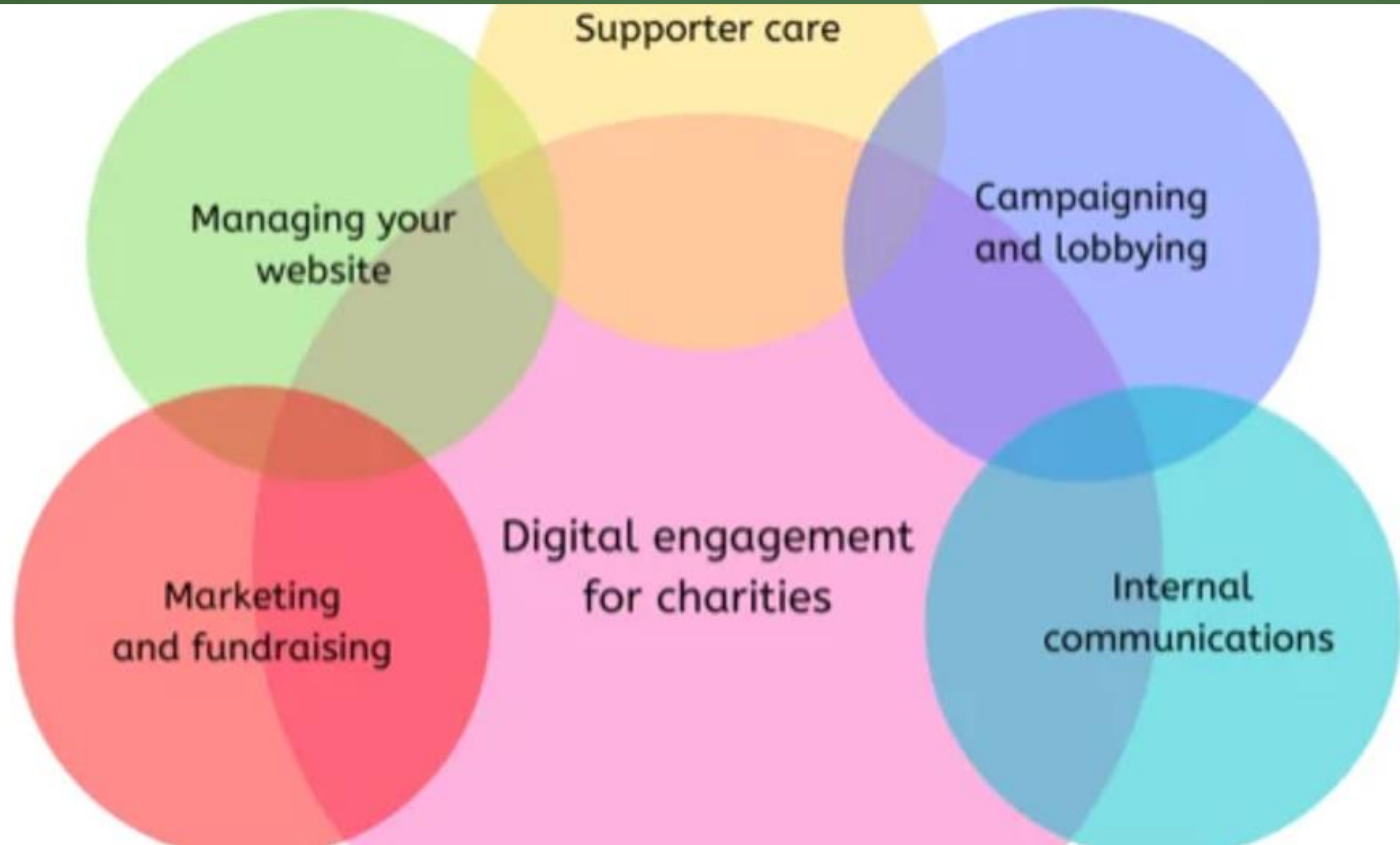




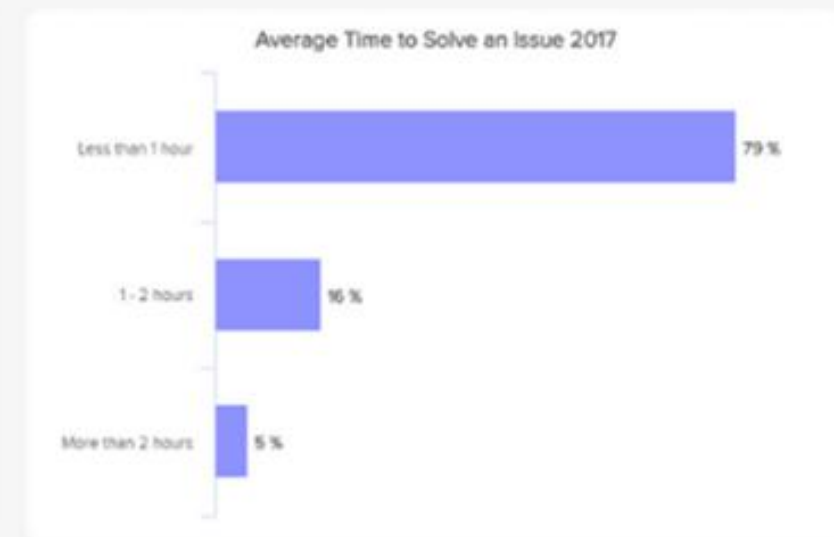
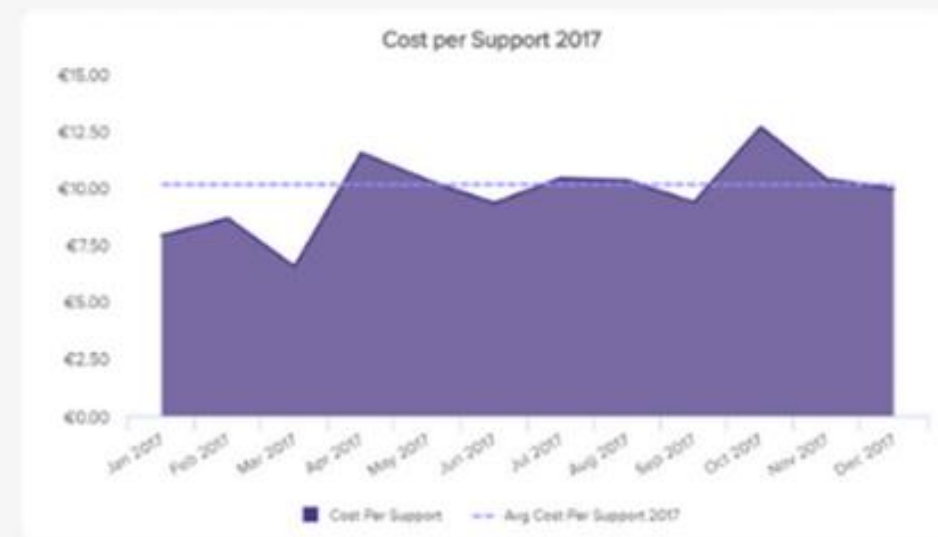
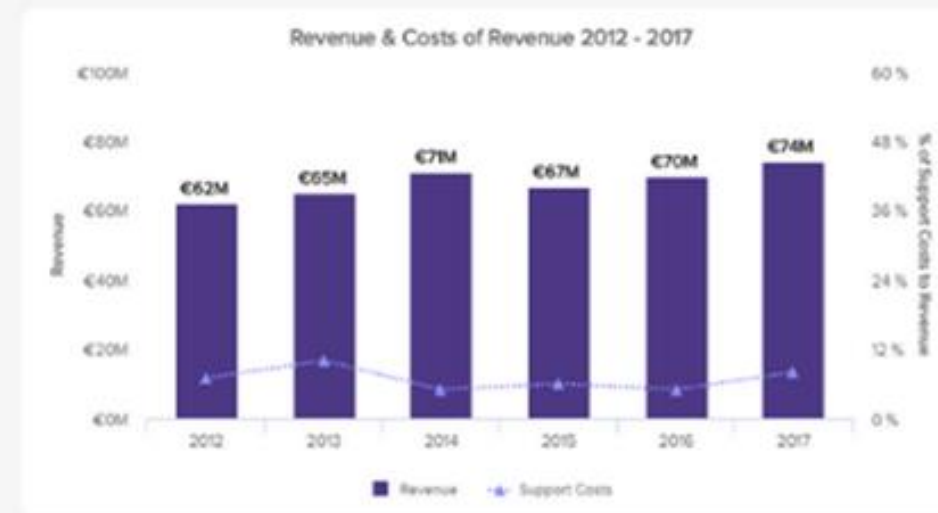
# Digital engagement





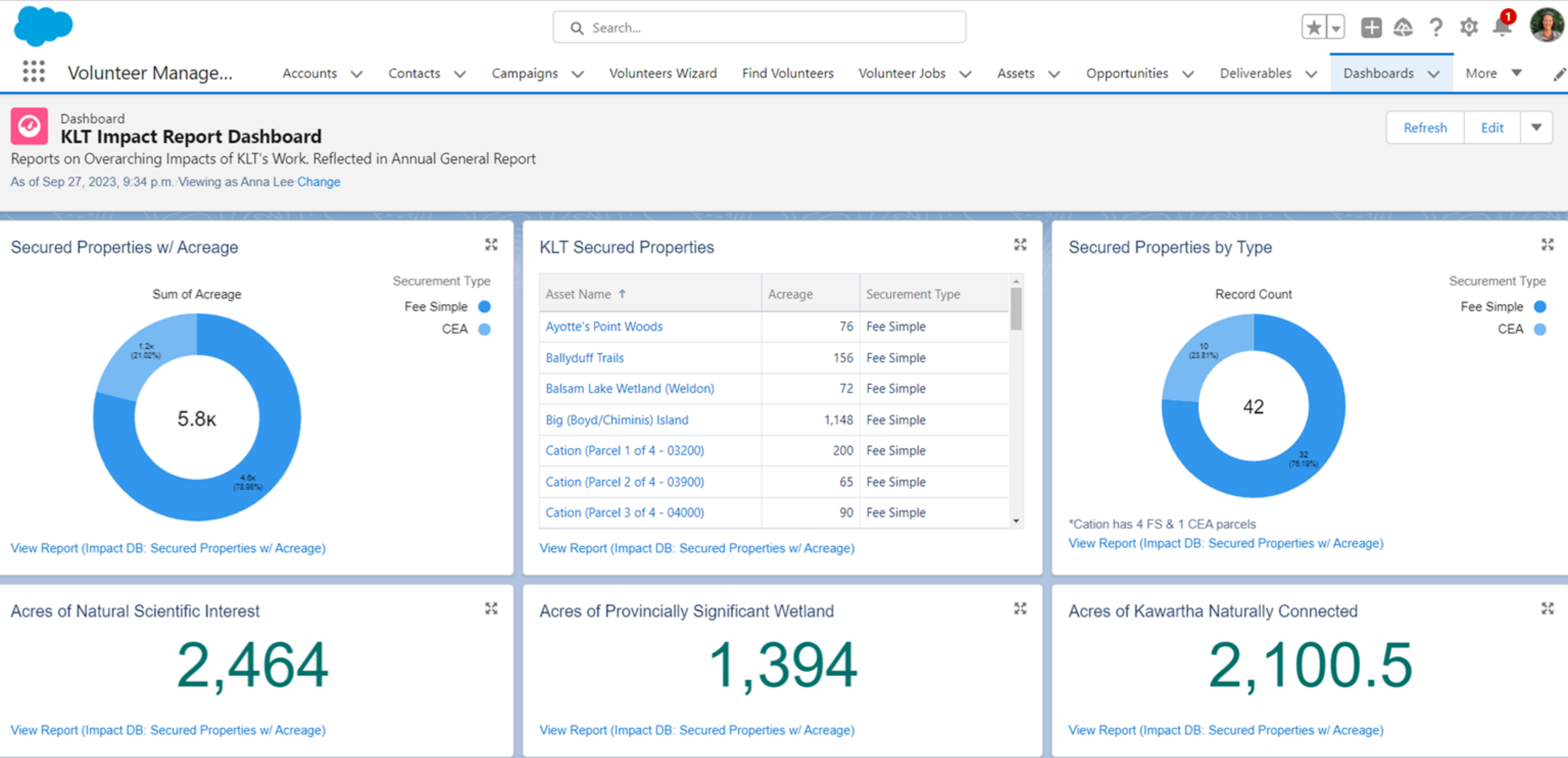


# STRENGTHEN YOUR ORGANIZATION WITH DASHBOARDS AND METRICS

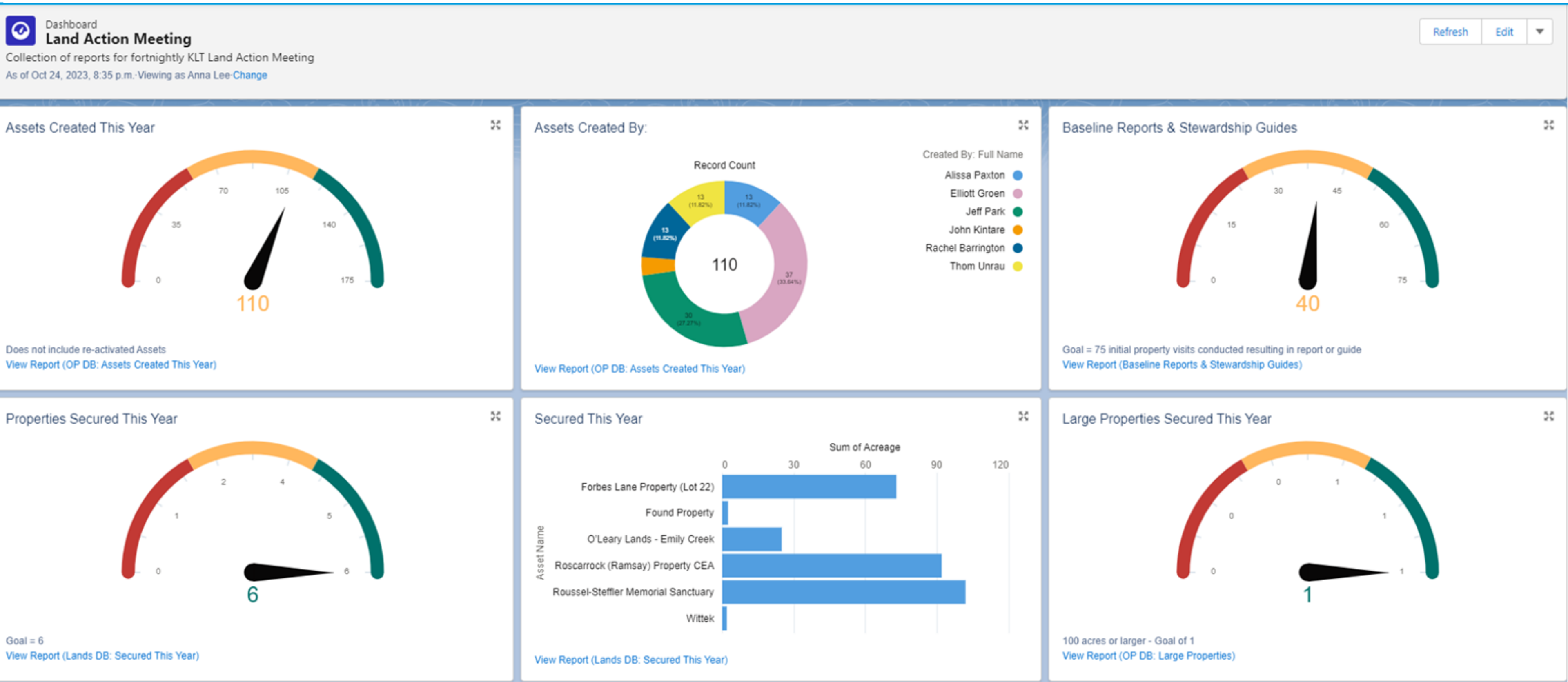




# Dashboards allow us to quickly access pertinent data



# For meeting workflows, operational tracking, funder & board reporting, storytelling ...







Asset

Jones Woodlot

[+ Follow](#)[Edit](#)[Clone](#)[Delete](#)

Contact

[Ross Jones](#)

Acreage

50

Asset Staff Lead

[Anna Lee](#)**Details**

Stewardship

Related

Secured

Partners In Conservation

Asset Name

Jones Woodlot



Contact

[Ross Jones](#)

Address Description ⓘ

<https://goo.gl/maps/Ap1MKXnPLgbj7NGf7>Country Lane, (South of Cty Rd. 8 and North of Powles Rd.),  
City of Kawartha Lakes

Municipality

City of Kawartha Lakes



Assessment Roll Number ⓘ

16512100202020000000



Parcel Registry (PIN)

63162-0419



Acreage ⓘ

50



Hectares

20.23

Date File Opened

2020-12-09



Property Source

From property owner



Conservation Value Assessment

30



Conservation Authority ⓘ

Kawartha Conservation (KRCA)



Risk Assessment Rating



Parent Asset



Acreage Source

MPAC



Asset Closed (date) ⓘ



## Description

Legal Description

PT LOT 18 CONCESSION 6 SOUTH EAST QUARTER FORMER TOWNSHIP OF FENELON CITY OF KAWARTHA LAKES

**Activity**

Chatter



Filters: All time • All activities • All types

[Refresh](#) • [Expand All](#) • [View All](#)

## Upcoming &amp; Overdue

☐ Other

Oct 31, 2022

[Patricia Wilson](#) has an upcoming task

## January • 2023

9 Months Ago



Verify Acreage

Jan 11

[Jeff Park](#) had a task

## October • 2022

Last Year



Call - re: illegal hunting and ...

Oct 7, 2022

You logged a call with [Dan Lanteigne](#)

No more past activities to load.

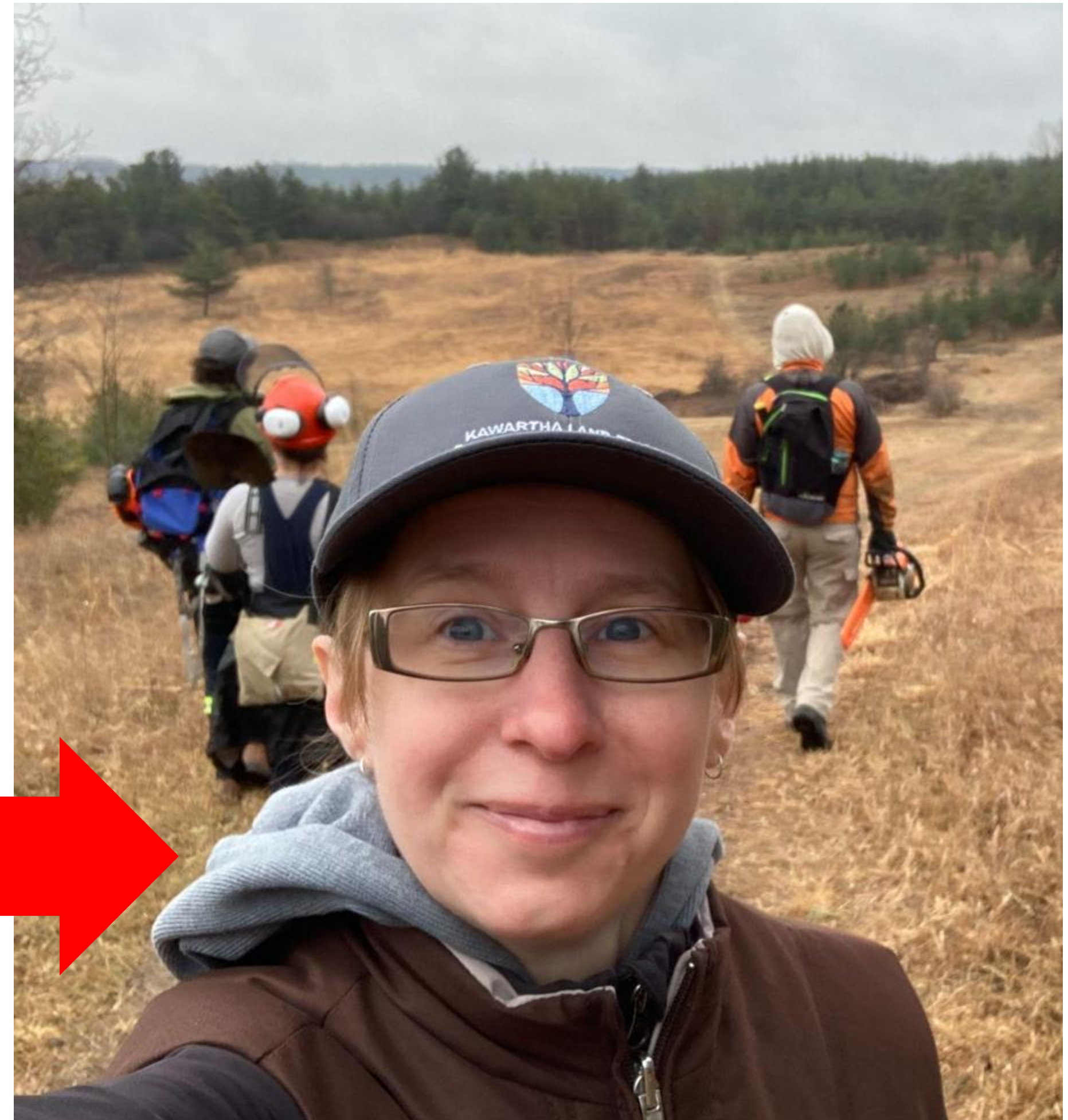
## A database is useless if:

- Staff don't know **how** to use it
- Staff **don't** use it
- Data is incorrect, old, duplicated

## Tips for Success:

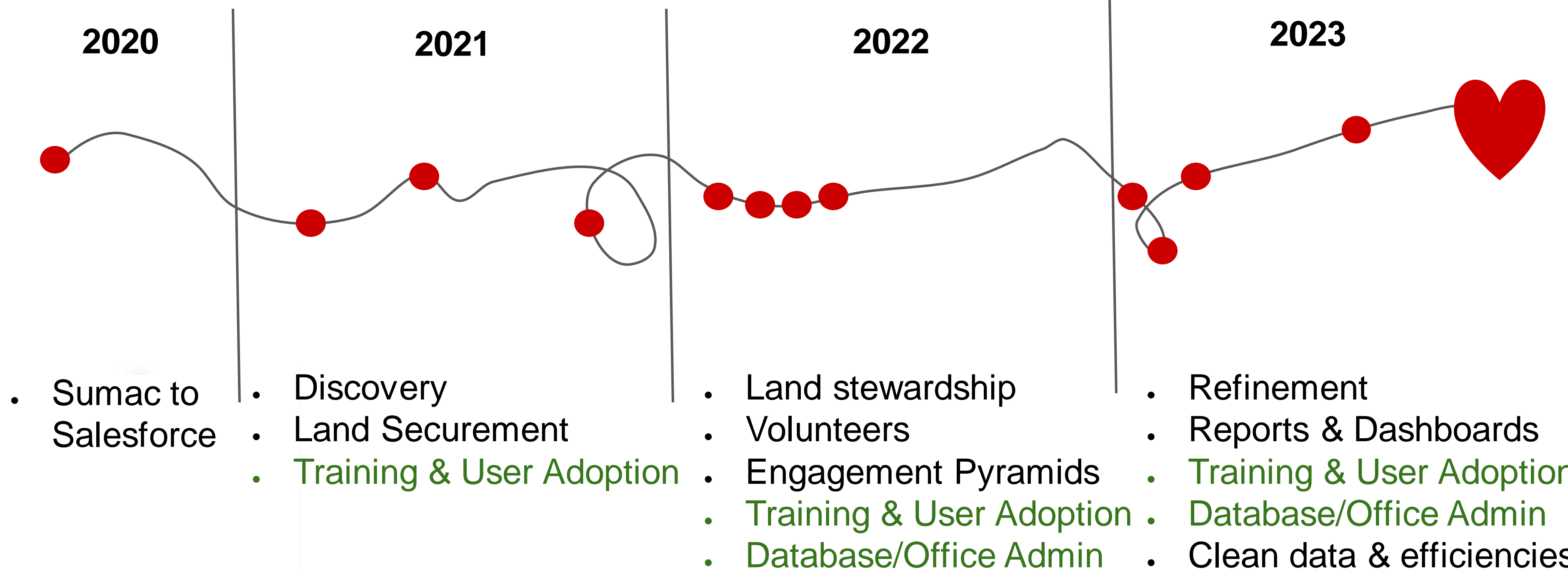
- Resourced position to manage database and train staff
- Training and ongoing user adoption
- Ongoing maintenance/data cleaning

**Key to  
success**





# Good databases take time - KLT timeline





**Our challenges require we communicate with  
decision makers.**

**GOVERNMENT RELATIONS AND ADVOCACY**



How could decisions at any of these levels support the work of your organization?

A graphic for the Municipal level consisting of three overlapping rounded rectangles. The top rectangle is dark blue, the middle one is light blue, and the bottom one is white with a blue border. The word "Municipal" is centered in the light blue rectangle.

Municipal

A graphic for the Provincial level consisting of three overlapping rounded rectangles. The top rectangle is dark blue, the middle one is light blue, and the bottom one is white with a blue border. The word "Provincial" is centered in the light blue rectangle.

Provincial

A graphic for the National level consisting of three overlapping rounded rectangles. The top rectangle is dark blue, the middle one is light blue, and the bottom one is white with a blue border. The word "National" is centered in the light blue rectangle.

National

Have you done enough to defend the Green Belt





# CASE STUDY - OFT's Greenbelt Advocacy

ONTARIO FARMLAND TRUST

Martin Straathof  
Executive Director



ONTARIO FARMLAND TRUST  
PROTECTING FARMLAND FOREVER



# Why does OFT engage in public policy advocacy?



**Our mission is to protect and preserve Ontario farmland and associated agricultural, natural, and cultural features of the countryside.**

- Public policy plays a large role in land use and land conservation.
- There is huge potential to make a big difference for land conservation through public policy, there is also significant risk posed when public policy changes.
- Our supporters expect it and our agricultural partner organizations ask for our input





# OFT'S Framework for PPDD Activities



- OFT engages in PPDD impacting farmland
- OFT generally does not comment on site specific PPDD (e.g. Official Plans) due to capacity (but change is coming!)
- OFT staff prepare policy submissions in accordance with internal policies and guidance from OFT's Policy and Education Committee
  - Policy and Education Committee is comprised of people with backgrounds in farming, planning, law, and real estate
- OFT policy submissions are shared on our website, blog, social media platforms, e-news, and in media releases



# GREENBELT CONTROVERSY



- Bill 23 introduced, which includes removal of 7,400 acres of Greenbelt
- Bill 39 also introduced to repeal the easements from the Duffins Rouge Agricultural Preserve
- No community consultation occurred on whether Greenbelt lands were needed to meet the housing supply (they weren't) nor consultation on which lands should be selected
- The government approved Bill 23 before the public consultation period ended



# Preparing Policy Submissions



Preparing comments for the Greenbelt changes, OFT...

- Maintained a non-partisan tone in policy submissions
- Kept the submissions focused on the issue at hand (tries not to bring up past issues)
- Based our submissions on the knowledge held by staff, committee members, and on further research
- Backs up statistics and facts with citations
- Keeps it concise (submissions are ideally no more than 2 pages)
- Partner where appropriate





# Then comes public engagement...



## DUFFINS ROUGE AGRICULTURAL PRESERVE

OFT writes to the federal government asking them to take action to protect the Duffins Rouge Agricultural Preserve.



SWIPE

### What is the Duffins Rouge Agricultural Preserve (DRAP)?

DRAP consists of 4700 acres of prime agricultural land and important natural habitat outside of Pickering. It is also adjacent to the Rouge National Urban Park.

### What is happening to DRAP?

The Province of Ontario recently repealed protections for DRAP lands and removed it from within the boundaries of the Greenbelt. The loss of these lands will directly impact food security and will likely negatively impact the Rouge National Urban Park.



SWIPE



# Calls to action & providing tools



## What action has OFT taken?

OFT has provided comments opposing the repeal of DRAP legislation several times in the past.

OFT just released a letter to The Honourable Steven Guilbeault, the federal Minister of Environment and Climate Change Canada, asking the federal government to take action to protect DRAP. The letter contains several recommendations, including bringing OFT in as a community partner.



SWIPE

## How can you help?

1. **Share this post!** Spread the word about DRAP to your network.
2. **Share OFT's policy submissions** with your network to help raise awareness.
3. **Contact your MP** and let them know you care about DRAP lands and want to see them remain in agriculture.



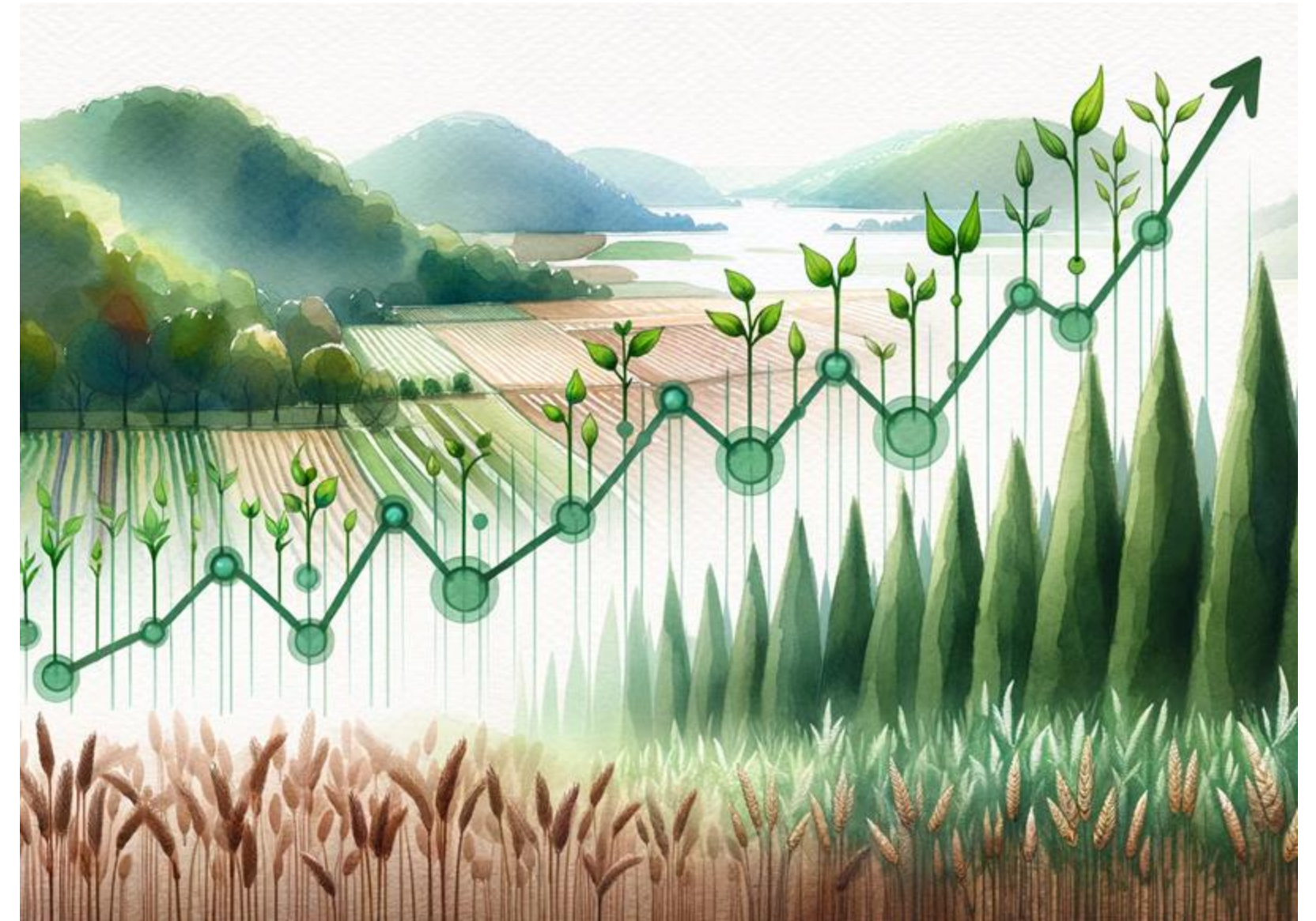


# Outcomes for OFT



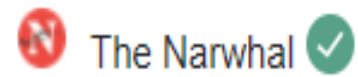
Bill 23 still passed... BUT OFT remained vigilant in our comments on the subject and here are some results:

- OFT became highly sought after - interviewed by 10 journalists and spoke at Queen's Park three times
- OFT has been mentioned in at least **109 articles**
- The rate of new social media followers and website visits **doubled** our monthly targets
- Between Oct 2022 and Oct 2023, OFT has received donations from **200 new donors**
- OFT now has 5 new partners (saving OFT resources!)





# All the work paid off...



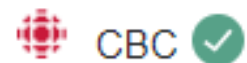
## Ford reverses Greenbelt decision

Doug Ford's Greenbelt decision reversed as Ontario premier apologizes for breaking promise and opening land in protected area to...



## Doug Ford reverses Ontario Greenbelt land swap decision: 'It was a mistake'

Ontario Premier Doug Ford announced Thursday that his government will reverse the controversial Greenbelt land swap decision it made earlier...



## Ford apologizes for 'wrong' Greenbelt decision, vows to reverse land swap

The Ontario government is changing course and reversing a contentious land swap for the province's protected Greenbelt, following weeks of...





Final Comments:  
OFT seen as a leader



"On the greenbelt reversal announcement, I immediately thought of OFT's strong advocacy in leading the way to protect our ag lands for now and in the future. This is a landmark occasion that will help us all. Thank you."

**New webinar series with new sponsors...**



**New community toolkit being developed...**





**THANK YOU FOR YOUR WORK.**  
YOUR ORGANIZATIONS ARE MAKING THE WORLD A BETTER PLACE.

Thank you to Gosling Foundation, Sustainability Network, Matt Price, Nature Canada, Canadian Freshwater Alliance, Institute for Change Leaders to draw from their work to develop this presentation.

Thank you to OLTCCOP participants – OLTA, Thames Thalbot Land Trust, Kawartha Land Trust, Kensington Conservancy, Long Point Land Trust, Oak Ridge Moraine Land Trust.