Identifying Communications Needs to Increase Tree Planting and Maintenance

Summer-Fall 2021

Final Report

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Table of Contents

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11/21/23

Summer-Fall 2021

EXECUTIVE SUMMARY

Project Overview

This evaluation of public outreach and engagement for tree planting and maintenance was undertaken by the Chesapeake Bay Program and its partners through the Alliance for the Chesapeake Bay. The goal of this work was to lift up best practices in public outreach employed by tree-related campaigns, and to identify the gaps that exist in tree campaigns' ability to carry out effective outreach.

In this inquiry, success is defined as an engaged public, resulting in demand to plant more trees and landowner/community commitment to maintaining trees over the long term. Three broad recommendations to improve public engagement with tree planting and maintenance across the watershed emerged from this work.

This project was led by Rachel Felver, Communications Director, Chesapeake Bay Program, in collaboration with colleagues from the Alliance for the Chesapeake Bay and U.S. Forest Service. The technical aspects of this study were designed and conducted by OpinionWorks LLC, a research and public outreach firm based in Annapolis, Maryland, led by Steve Raabe.

The observations in this report are drawn from in-depth interviews and focus groups involving 33 practitioners who are running or facilitating tree planting and maintenance efforts in state and local agencies, and regional or local non-profit organizations, in all parts of the Chesapeake Bay watershed. These interviewees were identified through a crowd-sourcing exercise early in the project, a survey of the Forestry community distributed peer-to-peer, garnering 289 responses and resulting in a database of 119 tree campaigns.

Contextual Issues

Throughout the discussions with tree campaign practitioners, four contextual issues arose repeatedly. Though not directly related to public outreach, each of these is affecting the focus and priorities of tree campaigns, their reach and capacity, and their ability to be successful in public outreach.

- **A Focus on Tree Equity**

  There are many efforts underway in urban forestry to map historically underserved areas and focus tree planting in those neighborhoods. This focus is moving practitioners into new communities where audiences may not respond to traditional environmental messaging, placing a priority on involving community members and understanding the perspectives of residents – a competency that we found was sometimes lacking in campaigns.

- **Lack of Resources for Tree Maintenance**

  Participants in these interviews spoke over and over about how difficult it is to maintain the trees they have planted. They said funders do not prioritize maintenance of trees, focusing instead on new trees in the ground. There is an implication for outreach and engagement, practitioners said, because a poorly maintained project that is visible to neighbors can set back the effort to engage new people.

- **Difficulty Hiring and Retaining Staff**

  Given the tremendous disruption of the pandemic and the "Great Reassessment" that is affecting so many workplaces today, organizations and public agencies charged with tree planting and

maintenance are experiencing difficulties with hiring and staff retention like most every other field. Practitioners point out that this field is not highly paid, so the pressures on hiring and retention are even greater. People suggested that this hampers organizations that are trying to conduct outreach because they lose knowledge about programs and relationships with landowners.

- **Strained Tree Supply**

  Given the widespread growth in tree planting efforts, tree supply has become an issue. Commercial nurseries are stretched, and public sector or non-profit sources are limited. Overall supply and specific tree species can be tapped out, putting a practical limit on what can be planted.

Eight Ingredients for Success in Public Outreach and Engagement

Throughout these interviews, eight themes emerged and recurred as hallmarks of the tree planting and maintenance efforts that successfully reach and engage the public.

1. **Relationship-Based Campaigns, Grounded in the Community**

   Investing time, energy, and resources in patiently building relationships with landowners (in the case of buffer programs) and community members (urban tree programs) to foster trust and understand and respond to their needs and perspectives. This means listening and building trust, not just telling a landowner or homeowner that their property is a good fit for trees. It means *involving* the landowner or community member in planning and decision making.

2. **Trained Field Staff and Community-Based Stewards**

   Training and deploying professional field staff, as well as volunteer Tree Troopers, Watershed Stewards, and the like, so the sponsoring organization or agency has many legs in the community and can carry out a relationship-based effort. Partnerships between public sector agencies and local non-profits that can deploy staff and trained volunteers less expensively is a key to a successful field model.

3. **A Commitment to Identifying and Cultivating New Audiences**

   Moving beyond just reacting to the neighborhoods and property owners that typically rush forward and request trees, to bring focus to new constituents who are more likely to respond to non-traditional messages and techniques. The intentionality of focusing on priority audience segments and determining how best to reach and engage them requires a sustained commitment of energy and resources, and often requires approaching old questions in new ways.

4. **A Spark-Plug Leader**

   An energetic, relational leader who directs and sustains the effort, focuses on outcomes, constantly refines tools and approaches, all while inspiring people to become part of the effort. Such leaders bring colleagues together to discuss and solve problems and share best practices. And they are innovative, recognizing gaps and shortcomings in existing programs and inventing new ways to address them.

5. **Active Organizational Partnerships and Collaborations**

   Strong, collaborative partnerships with peer organizations, characterized by communication, mentoring, and sharing what works. These relationships are sometimes formal and contractual, and sometimes less formal, but when they are successful they are always systematic and intentional, and characterized by strong communication and clarity of focus.

6. **Authentic Neighbor-to-Neighbor Recommendations**

   Leveraging the trust that neighbors have in each other and the power of social norming through testimonials, social media posts, and similar methods. One of the most successful motivators for planting trees, practitioners pointed out, is knowing that your neighbor has planted a tree or a buffer and is happy with the result.

7. **Sustained, Mutually Reinforcing Outreach**

   Using multiple outreach channels and tools that are timed and designed to reinforce each other, rather than relying on a single outreach mechanism alone, such as a one-time mailing. The most successful campaigns are designing communications that have consistent messaging and delivering them thoughtfully through multiple channels.

8. **Simple, Flexible Program Design and Approach**

   Addressing the problem of program inflexibility, including tree programs that require substantial up-front outlays by landowners, long-term contracts, or are difficult to apply or qualify for, innovative program managers are bringing additional flexible funding to the table, developing new or supplemental programs, and streamlining or eliminating applications to help address these barriers.

Public Outreach Gaps Identified by This Research

There are many success stories that we heard in this project. But this project also identified significant gaps in public outreach capacity and execution. These are the most common gaps.

Gap #1: Technical Assistance and Training

Most often, tree managers are technical experts in planting and maintaining trees. Much less often, they are trained in social science, communications, or public outreach. Focused training, technical assistance, and coaching are needed in the best practices of public outreach and engagement.

Gap #2: Understanding the Motivations of New Audiences

Tree planting campaigns rarely employ tools to understand their audience beyond using their staff's own intuitive listening skills. This gap becomes especially important as practitioners are pushed to address unfamiliar audiences. Enabling better audience understanding is critical to effective outreach.

Gap #3: Lack of Systematic Networking and Collaboration among Tree Practitioners

Collaboration and coordinated communication among tree planting practitioners is uneven, and the sharing of best practices and lessons learned in public outreach is very limited in the tree planting community. Tree planting practitioners, particularly those running smaller campaigns, would benefit from more intentional networking and sharing of best practices in outreach.

Gap #4: Funding Constraints

Successful public engagement is constrained by public sector procurement rules and large funders' tight focus on the number of trees that go in the ground, devaluing the task of building community participation and buy-in. Funding criteria must be reexamined – if public outreach is a priority.

Gap #5: Program Inflexibility

Government programs meant to encourage tree planting are often complicated and restrictive, making them unattractive to some landowners and complicated and difficult for all but expert tree practitioners to offer. More flexible funding must be a priority watershed-wide.

Gap #6: Lack of Availability of Basic Outreach Tools

It is a bottom line finding of this work that basic outreach tools and competencies are often lacking, with too little training in public outreach and too little sharing of successful and creative tools. When good tools are created, they must be made available freely and widely.

Gap #7: Little Emphasis on Evaluation

Tree campaigns are doing very little evaluation of their public outreach efforts.

Baywide Recommendations for Improving Public Outreach

This project is premised on the idea that more effective public outreach and engagement will advance tree planting goals and will help ensure that trees are cared for long after they are planted. Landowners and community members who are involved in the process of planning buffers or urban tree planting will not only create more demand for trees today, they will also become advocates who will increase tree adoption within their personal and community networks in the future.

These recommendations are intended to move public outreach for trees significantly forward. They are based on an understanding of what a watershed-wide tree planting strategy truly rooted in the best practices of public outreach would look like.

1. Baywide Staff and Support for a Focused Public Engagement Strategy

One of the key takeaways from this work is how siloed tree efforts can be. Public outreach successes are often not known or shared outside their home jurisdiction of region, and young tree campaigns are often inventing their outreach plans from scratch. There is a great need for coordination, encouragement, training, and strategic direction of outreach from the Chesapeake Bay Program level, by a staff team that understands tree planting and maintenance, while being steeped in social science and communications.

This commitment would be reflected by these actions:

- Create a new Baywide staff position, a Forestry Outreach Coordinator, housed in the Bay Program's Communications Office, to support tree campaigns with a coordinated outreach strategy and toolkit, including bringing practitioners together for networking and training around public outreach.
- Identify, make visible, and support a cadre of mentors, recruited from among successful tree practitioners, creating a career pipeline for people who feel they have topped out in their current positions.
- Network a corps of external technical assistance providers who will be available to tree programs to expand their capacity to implement public outreach – such as marketing and communications agencies, graphic designers, writers, audience researchers, etc.
- Encourage funders to formalize public outreach and community engagement requirements and evaluation in grant RFPs, and to follow that up with sufficient and dedicated funding for those efforts.

2. A Web Portal to Aggregate Public Outreach Tools and Best Practices Information

To aid the sharing of expertise and best practices, plus the practical tools used in outreach, the Forestry community should create an online clearinghouse and promote it heavily among tree planters. ChesapeakeTrees.net is an existing resource that could be updated to more intentionally support public outreach. An updated portal would:

- Share effective public outreach tools and templates for practitioners to download and adapt, including sample letters, emails, door hangers, postcards, web content, etc.
- Share messaging advice and relevant audience research for multiple audiences – beyond the agricultural landowner and traditional environmentally motivated audiences, which are already well-understood. This is particularly important today, given the equity mapping which is driving tree efforts into new neighborhoods with differing priorities.
- Curate and host an image library, with content contributed by various local tree campaigns, augmented by the Bay Program's professional photography resources.
- Outline successful public outreach models and campaign plans for others to emulate in their own settings.
- Provide a primer on essential best practices, such as how to understand audiences, identify trusted messengers, do outreach that is mutually reinforcing, etc.

3. Systematic Coordination of Networking and Frequent Training

There is a great deal of collaborative discussion underway in the Forestry community. But there is little focus in those conversations on building public outreach capacity and expertise. And many practitioners are not tied into those collaborative conversations at all. Tree-related outreach would be greatly improved if the Bay Program and its partners would:

- Regularly bring together tree managers for sharing best practices in public outreach and focused training opportunities, with attention to community type (urban, suburban, small town, rural) and buffer vs. urban tree programs.
- Expand and continually update the database of tree campaigns and their key staff people that was created through this project, to help ensure that every practitioner can be included in these coordinated networking and training opportunities.
- Cultivate and train colleagues, such as Soil and Water Conservation Districts, who are not *exclusively* focused on tree planting and maintenance, but who are valuable partners in those efforts.
- Encourage a regional strategy of messaging and branding based on what has been shown to work. That means staying actively engaged with tree campaigns that are producing the best results. Fund a deeper toolkit for those most effective campaigns and make those tools available so that other practitioners throughout the watershed will adopt and use them.

We commend these recommendations to the Chesapeake Bay Program and its partners. Our full report is available, offering more detail to support these observations and source material from the practitioner interviews.

PROJECT OVERVIEW

Project Purpose and Project Owners

This evaluation of public outreach and engagement for tree planting and maintenance was undertaken by the Chesapeake Bay Program and its partners through the Alliance for the Chesapeake Bay. The goal of this work was to lift up best practices in public outreach employed by tree-related campaigns, and to identify the gaps that exist in tree campaigns' ability to carry out effective outreach.

This work was designed to achieve these outcomes, as spelled out by the Alliance:

> *By gathering and synthesizing existing products and campaigns, coupled with direct feedback and a more detailed assessment of the communications needs of our partners, and other practitioners and technical service providers, this project will identify key knowledge, products and resources needed to communicate with stakeholders more effectively, while advancing forestry outcomes.*

The observations in this report are drawn from in-depth interviews and focus groups involving 33 practitioners who are running or facilitating tree planting and maintenance efforts in state and local agencies, and regional or local non-profit organizations, in all parts of the Chesapeake Bay watershed. These interviewees were identified through a crowd-sourcing exercise early in the project, a survey of the Forestry community that garnered nearly 300 responses and that identified tree campaigns and the practitioners who are responsible for them.

This workgroup steered the project:

Rachel Felver, Communications Director, Chesapeake Bay Program, Alliance for the Chesapeake Bay
Jake Solyst, Web Content Specialist, Chesapeake Bay Program, Alliance for the Chesapeake Bay
Julie Mawhorter, Mid-Atlantic Urban and Community Forestry Coordinator, U.S. Forest Service
Sally Claggett, Liaison to the Chesapeake Bay Program, U.S. Forest Service
Katie Brownson, Watershed Specialist, U.S. Forest Service
Craig Highfield, Director, Chesapeake Forests, Alliance for the Chesapeake Bay

The technical assistance provider undertaking this work was OpinionWorks LLC, a research and public outreach firm based in Annapolis, Maryland. Steve Raabe was the principal investigator and authored this report.

Project Methodology

This inquiry unfolded in three phases:

1. Survey of Forestry Professionals (July – August 2021)

The project began with an inventory of the tree planting and maintenance campaigns taking place across the watershed through an online survey distributed peer-to-peer within the community of Forestry professionals. A questionnaire was developed and hosted online, identifying tree campaigns and capturing key details including campaign name, timing, sponsoring organization, key contact person, purpose, target audience and geography, as well as an assessment of the campaign's success.

The survey was widely distributed and achieved 289 responses, resulting in a database of 119 campaigns.

2. Formative Interviews (September 2021)

As a formative step in understanding what practitioners might identify as successes and best practices, as well as lessons learned and gaps in their capacity or technical support, a cross-section of campaigns were selected that were regarded as successful by their peers, and five individual in-depth interviews were conducted virtually on the Zoom platform between September 7 and 13, 2021. These interviews surfaced a number of issues that were tested much more broadly in the third phase of this project.

3. Focus Groups among Practitioners (November 2021)

Five group discussions were held between November 1 and 4, 2021, among practitioners who are responsible for tree planting and maintenance campaigns. The group discussions were held virtually, recognizing the need for safety during the ongoing pandemic, while making it possible for practitioners to come together regardless of geography.

Participants were grouped with others who were running similar campaigns to allow for the deepest and most vibrant discussion. These were the five focus group segments:

Segment 1A: Highly Developed Buffer Campaigns (November 3, 6 participants)
Segment 1B: Less-Developed and Emerging Buffer Campaigns (November 2, 6 participants)
Segment 2A: Highly Developed Urban Campaigns (November 1, 5 participants)
Segment 2B: Less-Developed and Emerging Urban Campaigns (November 3, 5 participants)
Segment 2C: Most-Urban Campaigns (Baltimore, DC, Richmond; November 4; 6 participants)

The focus groups addressed these broad topics, and will form the basis for the observations offered in this report:

- Origins of the campaign
- Importance of goal setting
- Role of partners to the campaign
- Understanding and prioritizing audiences
- Campaign tools
- Evaluation of the campaign's outcomes
- Summary of successes and gaps

Summer-Fall 2021

Structure of This Report

This project focused on the key elements of successful tree planting and maintenance public outreach. Success is defined in this inquiry as effectively reaching out and engaging the public, resulting in public demand to plant more trees, and landowner/community commitment to maintaining trees over the long term. This work also uncovered recurring barriers and gaps that are limiting the effectiveness of many tree campaigns, but which can be overcome.

The mission of this project is improving public outreach. This project is not focused on addressing technical aspects of tree planting and maintenance. Naturally, those technical topics came up frequently in the discussions with practitioners. Where they bear on public outreach, they will be discussed in this report.

There are significant differences between riparian buffer programs and urban tree programs – in program design, goals, audience and more – and this project was designed to take those differences into account. Nonetheless, though some observations below focus specifically on buffer programs or urban programs, there is an attempt to provide a unified overview, as many of the issues we encountered affect different types of programs.

This report is organized in four major sections as follows:

Section A: Context That Affects Tree Campaigns Today

The report notes four key considerations that define the context in which tree-related public outreach occurs today, such as a focus on equity, and the limits of tree supply.

Section B: Eight Ingredients for Success in Public Outreach and Engagement

This analysis identifies eight key ingredients that we found often characterize the tree planting and maintenance campaigns that are most successful at public outreach and engagement. The discussion includes examples of what campaigns are doing right.

Section C: Public Outreach Gaps Identified by This Research

This work brought to the surface many gaps in effective outreach that practitioners face, which the Chesapeake Bay Program, funders and partners could help address. The report summarizes those gaps and concludes with a set of recommendations for improving public outreach on behalf of trees across the Chesapeake Bay watershed.

Section D: Baywide Recommendations for Improving Public Outreach

Three major recommendations arose from this work, based on an understanding of how a watershed-wide public outreach strategy rooted in best practices would look.

Please note that throughout this report we offer specific examples of creative leadership and successful programs. Occasionally we identify specific programs as a way of lifting up those successes. In doing that, we recognize we are leaving many people and programs that are doing great work unmentioned. It is our hope that through these positive examples we are paying tribute to all the good work that is being done, rather than excluding anyone. This report is written in the spirit of appreciation for everyone who is dedicating themselves to fostering tree planting and maintenance in all parts of the watershed.

SECTION A: CONTEXT THAT AFFECTS TREE CAMPAIGNS TODAY

Four contextual issues arose repeatedly. Each of these is affecting the focus and priorities of tree campaigns, their reach and capacity, and their ability to be successful in their outreach. We offer them here to give a sense of the context in which tree planting and maintenance projects are operating today.

1. A Focus on Tree Equity

There are many efforts underway in urban forestry to map historically underserved areas and focus tree planting efforts in those neighborhoods. GIS (Geographic Information System) analyses identify areas with low tree canopy. Community maps of social indicators and historical discriminatory practices such as redlining are overlaid, producing a means of focusing tree-planting efforts in neighborhoods where the need is greatest.

This focus is moving practitioners into new neighborhoods where audiences may not respond to traditional environmental messaging. Residents may not view trees as a priority at all, and may sometimes resist them. This places a priority on involving community members and understanding the perspectives of residents – a competency that we found was sometimes lacking in campaigns. Practitioners recognize that new approaches are needed with new audiences.

Tree planting practitioners interviewed for this study offered perspective:

> *"I noticed that the relationship between people in some of our lower-income communities, the way they looked at trees was completely different than how I looked at trees. …(In neighborhoods where we work), people are like, 'Whoa, whoa, whoa, whoa, whoa. No, my cameras need to be able to see the street. That isn't safe. People will hide there. That's a place for drugs and illicit activity.' … I think oftentimes our messaging is very much too tailored towards a practitioner's values, because we love trees and we love their benefits. But really (it is important to try) to understand what people do like."*

> *"I have found that the communities with no trees fight the hardest to keep it that way. There's a lot of theories… So I started really trying to read the literature online, because I was like, 'I wonder if there's answers to this. Am I the only person observing this?'"*

More assistance is needed to help tree planting practitioners reach out, involve, and respond to the needs and preferences of new audiences that have not traditionally been engaged with tree planting efforts. New approaches and new messaging is needed.

2. Lack of Resources for Tree Maintenance

Participants in these interviews spoke over and over about how difficult it is to maintain the trees they have planted. They said funders do not prioritize maintenance of trees, and do not provide the resources they need. There is an implication for outreach and engagement, practitioners said, because a poorly maintained project that is visible to neighbors can set back the effort to engage new people.

> *"I want to second the notion about maintenance. I know that's not an outreach issue, but it becomes an outreach issue when you're talking with a landowner and they say, 'So what happens when the trees die? Or what do I need to do to take care of this?'"*

"If you have an unsuccessful buffer and the tubes are laying all over and it looks terrible and you see it from the road, it's not a very good impression, and other landowners aren't interested in having a mess on their property either."

Throughout this project, we did hear of innovative or low-cost ways to help with maintenance, such as the Chesapeake Bay Foundation's "Alternative Spring Break" program in partnership with several universities, bringing students out for a week in the spring to do tree maintenance. The Upper Susquehanna Coalition has a cadre of "Buffer Stewards" who are typically students in Forestry or other natural sciences, based in county ag offices for a four-month engagement, and playing an invaluable role assessing tree survival and helping with maintenance tasks. Despite successes such as these, throughout these interviews practitioners stressed that much more needs to be done to provide resources and share best practices for tree maintenance.

3. Difficulty Hiring and Retaining Staff

Given the tremendous disruption of the pandemic and the "Great Reassessment" that is affecting so many workplaces today, organizations and public agencies charged with tree planting and maintenance are experiencing difficulties with hiring and staff retention like most every other field. Practitioners point out that this field is not highly paid, so the pressures on hiring and retention are even greater. People suggested that this hampers organizations that are trying to conduct outreach because they lose the "institutional knowledge about some of these programs."

Staff turnover is not just about having sufficient capacity to implement projects. Interview participants pointed out again and again that relationship building is essential to making landowners comfortable – particularly those with properties capable of hosting larger planting projects. When relationships are formed and then severed due to turnover, that is a setback.

"…you have to have that relationship with them and they have to have a trust in you and (you) have to have a trust in them. So it's building some of that relationship and yes, that sometimes is putting more staff on to make them comfortable working with that new person. But we're in the conservation arena, all of us don't get a lot of pay either. So that revolving door of young people coming in and out is not always as steady as some of us would like it to be."

Adequacy of staff pay and support, as well as providing a pipeline for upward mobility within the profession, are key structural issues affecting the success of tree campaigns.

4. Strained Tree Supply

Given the widespread growth in tree planting efforts, tree supply has become an issue. Commercial nurseries are stretched. Overall supply and specific tree species can be tapped out. As one tree manager of a large urban program said, "We have cast a pretty good web, but we're buying up all the trees that are available."

Practitioners we interviewed described a number of factors that are leading to supply constraints.

- First and foremost, tree planting efforts are creating demand and straining the supply of native tree species.

- Private growers are worried about competition from the public sector and apply pressure to try to prevent the expansion of public nurseries that could address supply constraints. States have put restrictions on their nurseries to prevent competition with private growers.
- At the same time, private growers are skeptical about stepping up their growing to meet this demand, because they worry the current demand is a bubble, and they may be left with unwanted tree supply in the future.

> *"They have a fear that this is only a blip in time, and in two years, we're all going to change and they're going to have ... by the time they're ready to sell their stock, no one's going to buy them. … I mean, that's their fear. How do we allay that fear?"*

Practitioners suggested that the Bay Program's Forestry Workgroup and State Foresters need to have a coordinated conversation with commercial growers and their associations to focus on the long-term needs and work out constraints so tree planting programs have a more sustainable long-term supply.

These four contextual factors affect public outreach. While not a central focus of this report, we summarize them first, because all four are significantly impacting the shape and capacity of public outreach efforts. The next section address public engagement, describing the eight ingredients that define success for tree campaign outreach.

SECTION B: EIGHT INGREDIENTS FOR SUCCESS IN PUBLIC OUTREACH AND ENGAGEMENT

Through this project, eight themes emerged in describing the tree planting and maintenance efforts that are successfully reaching and engaging the public. They are:

1. **Relationship-Based Campaigns, Grounded in the Community**

   Investing time, energy, and resources in patiently building relationships with landowners (in the case of buffer programs) and community members (urban tree programs) to foster trust and understand and respond to their needs and perspectives.

2. **Trained Field Staff and Community-Based Stewards**

   Training and deploying professional field staff, as well as volunteer Tree Troopers, Watershed Stewards, and the like, so the sponsoring organization or agency has many legs in the community and the ability to carry out a relationship-based effort.

3. **A Commitment to Identifying and Cultivating New Audiences**

   Moving beyond just reacting to the neighborhoods and property owners that typically rush forward and request trees, to bring focus to new constituents who are more likely to respond to non-traditional messages and techniques.

4. **A Spark-Plug Leader**

   An energetic, innovative, relational leader who directs and sustains the effort, focuses on outcomes, constantly refines tools and approaches, all while inspiring people to become part of the effort.

5. **Active Organizational Partnerships and Collaborations**

   Strong, collaborative partnerships with peer organizations, characterized by systematic (not ad hoc) communication, mentoring, and sharing of best practices.

6. **Authentic Neighbor-to-Neighbor Recommendations**

   Leveraging the trust that neighbors have in each other, and the power of social norming, through testimonials, social media posts, and similar methods.

7. **Sustained, Mutually Reinforcing Outreach**

   Using multiple outreach channels and tools that are timed and designed to reinforce each other, rather than relying on a single outreach mechanism alone, such as a one-time mailing.

8. **Simple, Flexible Program Design and Approach**

   Addressing the problem of program inflexibility, including tree programs that require substantial up-front outlays by landowners, long-term contracts, or are difficult to apply or qualify for, innovative program managers are bringing additional flexible funding to the table, developing new or supplemental programs, and streamlining or eliminating applications to help address these barriers.

Each of these ingredients is detailed below. Comments drawn from the interviews are included to help illustrate these observations in the words of the practitioners. Note that by agreement with interviewees, comments are not attributed to individuals to allow everyone to speak as openly as possible.

Ingredient #1: Relationship-Based Campaigns, Grounded in the Community

The first ingredient in successful public outreach involves relationships. Practitioners consistently indicated they had the greatest success when they had the time and support to do the patient work of building relationships with the landowners or community members who they hoped would plant and care for trees. That means listening and building trust, not just telling a landowner or homeowner that their property is a good fit for trees. It means *involving* the landowner or community member in planning and decision making.

A manager of one of the most successful urban tree programs in the region said the key is:

> *"…listening to communities and letting the communities really take the lead. Because I think it is so easy for us running these organizations to say, 'Well, we know you need trees, our maps show you need trees. Our GIS shows that. Let's just plant the trees.' But it doesn't work like that, and if the community's not part of it, then the project is likely to fail."*

By this estimation, listening is not just about learning how to properly message to a community, but it is in fact more about understanding the priorities of the community and ensuring that the tree campaign responds to and matches those priorities – which is key to the acceptance and care of urban trees over the long run. The manager of a tree campaign that is focused on faith communities related the need for community listening and buy-in to the very practical concern of tree survival:

> *"So everybody's excited to come out and plant the trees on planting day. That's a no-brainer. Going back and watering those trees for the two summers after planting day and having enough volunteers and having a water source and being able to get the water out to the trees and all of that, that's the real struggle."*

In successful buffer programs, these same principles apply. Building relationships with landowners is a long-term effort. As in the urban setting, building relationships is not just about getting a project in the ground initially. It is also about maintaining communication after planting as the years go by, so landowners continue to feel good about their projects, are knowledgeable about them, and hopefully willing to recommend buffers to their neighbors. As a best practice, tree planters should be in discussion with landowners for a significant amount of time, perhaps as much as a year, before any trees go into the ground, and remain in touch with them for a sustained period thereafter.

> *"I'm building the relationship like other people have said. I mean, by the time I get a buffer in the ground, I have been talking to these people for at least a year. So they know me and they know I'm going to call them and tell them, 'Hey, I'm sending the interns out. This is what they're going to do. I'll let you know.' This year we actually sent out formal letters and let them know what their survivability was in their buffer. And that went over pretty well. So I think we'll continue to do that, but so I guess I'm kind of saying the outreach has passed just getting new participants. It's keeping the people who have already committed to it. Knowing what's going on with their buffer and happy about it."*

> *"I do the exact same thing that (other practitioners) do, just really getting to know the person, where they are today, what they want for tomorrow is critical. And it takes so much time, we all know how much time it takes to meet somebody on the ground, walk around their field, kick the tires a bit and finally get around to the reason why we are here. I think asking those open-ended*

questions without any sort of judgment is pretty critical. … just being present for them is pretty important and really the best part of my job to be honest."

As they were designing their program initially, practitioners in a large suburban jurisdiction reached out to their peers and heard a consensus about the importance of building relationships with property owners. Rather than cultivating them for months as buffer managers describe, though, the timeline in an urban setting may be much shorter – but the priority of property owner involvement and consultation is the same.

"We surveyed a panel of folks across the region who have other planting programs, and by and large, everyone said that the buy-in wasn't so much money, or other things, but the relationship with the individual applicant. So we spend a few minutes talking to everybody to help them pick out their species in their locations, and then we put the tree in the ground for them."

Ingredient #2: Trained Field Staff and Community-Based Stewards

As an implication of the priority of relationship-building, tree practitioners who are primarily technical experts may need to be trained in the skills of relationship-building. They may also need sufficient flexible funding to deploy well-trained professional field staff, or form strong partnerships with other organizations that have such a field network. Deployed staff are invaluable in cultivating the type of landowner relationships just described, and in providing much-needed technical assistance and advice out in the field.

But public agencies and non-profit organizations focused on tree planting are chronically lean in their staffing, as the major focus is funding tree stock and the technical aspects of planting trees. While that emphasis is entirely understandable, lean staffing has made it more challenging for organizations to have the reach into communities they need. And lack of funding prevents programs from adding staff as they plant more trees and relate to more landowners, putting a strain on their ability to keep up.

"We're not getting any additional help, but we are now managing, as individuals, way more acres of buffers every year and we're not taking any off the list."

Creative tree programs are amplifying their efforts by training and equipping community volunteers, who are given the knowledge and agency to expand tree planting and help with maintenance. These training efforts typically involve several workshops or seminars to achieve a "certification" focused on the technical aspects of tree planting and care. While by no means an exhaustive list, here are examples of the types of volunteer certifications we heard about in these interviews:

- Alliance for the Chesapeake Bay's Tree Stewards
- Anne Arundel County Watershed Stewards Academy's Tree Troopers
- Penn State's Master Watershed Stewards
- Pennsylvania Horticultural Society's Tree Tenders
- Tree Fredericksburg's Tree Stewards
- TreeBaltimore's TreeKeepers

Most of these volunteer engagement programs focus on "topics such as tree biology, siting trees in a landscape, proper tree planting techniques, and more!" as described on the Anne Arundel County's Tree Troopers webpage. But occasionally, a program also trains its community stewards in outreach techniques: how to approach community members about trees, how to evaluate the community to determine where it would be most productive to focus efforts, what approaches to use in reaching out, and so on. A prime example is the Watershed Stewards Academy in Anne Arundel County, Maryland, which provides 30 to 40 Watershed Stewards each year with a deep 13-month curriculum and capstone project to teach both natural science and social science to its community volunteers – a thorough and very effective model.

Finally, some tree programs are engaging private sector landscaping professionals, providing opportunities for continuing education units (CEUs), effectively expanding the reach of the buffer or urban tree program through these private sector ambassadors.

> *"We've got some CEU opportunities now for landscape professionals that we didn't use to have around sustainable landscapes, Chesapeake Bay Landscapes, those kinds of things that we can use to promote our outreach programs to landscape professionals, and they can actually get credit for participating and then we can help spread the message about buffers and how to maintain them properly."*

Ingredient #3: A Commitment to Identifying and Cultivating New Audiences

The most successful campaigns are intentional and proactive about identifying, reaching out, and cultivating priority audiences. Like relationship-building, the intentionality of focusing on priority audience segments and determining how best to reach and engage them requires a sustained commitment of energy and resources, and often requires approaching old questions in new ways.

Success Stories

There are successes. Keystone 10 Million Trees Partnership, for example, has contracted with a technical assistance provider to research audiences and messages to help position their efforts for success given the ambitious goal. Other campaigns are succeeding because their leaders or field staff are intuitive listeners, or because they have built participatory relationships with their communities.

The Pennsylvania Horticultural Society (PHS), working outside the Chesapeake Bay watershed in Philadelphia, has recognized that leafier and more affluent neighborhoods will be quicker to request trees, while the neighborhoods with greater need may be less likely to do so. The City of Philadelphia, meanwhile, has an ambitious tree canopy goal of 30% in *every neighborhood* of the City, rather than a single citywide goal. PHS recognized that some neighborhoods lacked the community capacity to support new trees once they were planted. In response, they developed a sophisticated program of cultivating that long-term capacity – not just generating tree requests – in underserved neighborhoods, so that tree planting and maintenance efforts in those neighborhoods could be more sustainable for the long term.

> *"A lot of the communities that were most active in tree planting and care through us were some of the ones that needed that canopy boost the least. And we need trees everywhere, of course, but some of the highest priority neighborhoods of the city, with some exceptions, hadn't*

organized themselves around our Tree Tender model. So we created more local partnerships with community-based organizations to further those goals. And our development department has been working overtime to go after some grants to support some of this work too, where we can kind of use some of that money to build capacity in the neighborhood, and work with other groups and build their own capacity, so that we can get where we need to be with our tree planting efforts as well. And kind of a more cohesive community-based approach, rather than just volunteers planting and caring for trees."

Southside ReLeaf in Richmond demonstrates the value of being intentional about finding the motivations for tree planting that will match the community's priorities. They began with a focus on human health and the heat island effect in underserved neighborhoods, which correlated with a striking disparity in life expectancy in those neighborhoods. That led to a motivating and community-engaging focus, with energized campaign leaders (who were not traditional environmentalists) and effective connections in a community that understood and embraced the human health linkages of planting trees.

"We were fortunate to have a really enthusiastic guy at our local science museum here that did an urban heat island experiment, where he put heating tools all around the city and gathered data so that we can have really good maps on showing the urban heat island effect and where parts of Southside and of other areas of town are really experiencing hotter temperatures on the hottest days and showing that. So we are able to educate the community as we engage them on why this is important and not just a bunch of eager folks attempting to beautify spaces, but more so also cooling down spaces. And I think that before the experiment and before his maps, we weren't able to really visualize that. And so to be able to see that, also with the tree equity scorecard and some of the other tools that we've been able to use now, to really visually show the community how they've been neglected in the past."

Reaching a Community Equitably Means Appropriately Valuing People's Time

Southside ReLeaf has truly engaged the community, creating an 18-member "Green Working Group" made up of community residents who are not just involved in the project but are helping to lead it, creating a "greening master plan" for the community. These working group members are compensated for their time to participate in monthly meetings. This program recognizes that a commitment to equity involves being willing to value people's time by paying them. Their knowledge of the community and its sensibilities and preferences are making the project truly community-owned.

Similarly, efforts in both DC and Baltimore have involved compensating individuals in the community who are active in the tree planting effort as a means of showing appreciation and recognizing the value of their time. One organizer described a key volunteer who was devoting dozens if not hundreds of hours to the effort, opening countless doors in the community:

"So I think it's more than just a hundred dollar gift card. I think it's creating flexibility to... I don't know if it's a gig economy thing, but having cash to be like, 'Hey, let's give you a stipend for all the outreach you're doing. Maybe this is worth $5,000 for us for all the time you're putting in as a volunteer outside of your other two jobs that are paid.' You were doing a lot of work connecting the dots for us."

As another organizer put it, frankly:

> *"From my experience in my area, my district, these are folks that kind of work the odd jobs that maybe are a little bit more physical and demanding, or a little bit longer hours and a little bit harder. So you have to really (say), 'Am I going to spend my Saturday catching up on my favorite show and just relaxing, or am I going to do some hard labor with these tree loving, hugging groups that are out here...?' Just being honest."*

Overall, it is Ingredient #3, A Commitment to Identifying and Cultivating New Audiences, that emerged as the area of greatest contrast between campaigns that are succeeding and those that are struggling to meet their goals. This ingredient requires funding, training, and focus to give more tree campaigns the capacity and know-how to expand their efforts beyond the "choir" of landowners and residents who reflexively love trees.

Ingredient #4: A Spark-Plug Leader

It was striking that successful tree campaigns are often led by an individual – or occasionally by a small group of colleagues – who is visionary, entrepreneurial, relational and communicative, and seemingly tireless in their commitment to the success of their programs. Such leaders are spark plugs, bringing colleagues together to discuss and solve problems, and share best practices. They are innovative, recognizing gaps and shortcomings in existing programs and inventing new ways to address them. And they are usually intuitive, relating to the audiences they are trying to reach and understanding them on a gut level.

There are many great leaders involved with tree efforts across the watershed. These are four people who represent a cross-section of the spark plug leaders we found. We will not identify them by name or organization, as the purpose in highlighting these individuals is not to elevate them above their peers, but simply to illustrate the range of settings in which we found these leaders.

- A leader who is, in her words, "traveling the watershed, spreading the good news." She is constantly attending workshops hosted by partners on related topics (habitat, easements, etc.) and talking with landowners about buffering their streams, connecting interested landowners with local partners.

  Leaders like this are creating systems and structures around them. They are reinventing programs to make them more flexible in response to landowner input. This kind of a leader is connecting practitioners with each other, serving as a mentor and capacity builder. Here is a practitioner in a local Conservation District office talking about the support she receives from this leader:

  > *"We have check-in calls and all the counties call in and we share things that are going well, (and) things that aren't going well. And then because we have her and she's connected to everyone, she's my go-to person when I'm having an issue, and she can usually give me some pointers or what someone else has done."*

- A non-profit leader who carefully nurtured a relationship with the local government for many years. The non-profit has recruited and equipped a broad base of active volunteers, maintaining a tight focus on producing measurable outcomes to assist the County in meeting its stormwater obligations.

The deep reservoir of trust and confidence that County leaders felt about the infrastructure and programs that this non-profit partner has built led them to invite the organization, unsolicited, to manage a large pool of unencumbered money to launch a tree program with the sole directive to "plant trees." This program has gotten off to a fast start and merited the trust that the County invested in it.

- A tireless local advocate, who co-founded a small organization that trains volunteer tree stewards and advocates for green spaces in her community, while partnering with the City on tree planting. She demonstrated in our focus group that she was used to welcoming new ideas and problem-solving, even offering to partner with a fellow discussion participant from another jurisdiction on-the-spot. Her example shows that organizations with fewer resources can still innovate and apply best practices to make a local impact.

- An energized leader who did not see herself as a tree advocate just a few years ago, she is a community leader and activist focused on bettering her community and reversing historical inequities that are holding her neighbors back. Her level of commitment matches any of the more traditional tree stewards who participated in this study.

"I joke with folks all the time that five years ago, if somebody said something to me about planting a tree in my yard, I would be like, 'First of all, who wants to do those leaves? Who wants to have to mow around it?' And now, I'm just running around telling everybody about the importance of trees."

These examples illustrate just some of the range of inspiring leaders populating tree campaigns across the watershed. These spark plug leaders are often known to others and are pressed into service as mentors, often informally and outside their job descriptions, without additional compensation. The tree planting community should not rely so heavily on the informal mentoring provided by its spark plug leaders, but rather should formalize and fund such a support mechanism, so that all tree campaigns have the opportunity to grow leaders with the sills to carry out effective community outreach.

Ingredient #5: Active Organizational Partnerships and Collaborations

There were multiple effective partnership and collaboration models that emerged in this work. These are the major examples we encountered:

1. **A municipality with a strong external non-profit partner**, for example the contractual relationships that exist between Casey Trees and the DC Department of Energy and the Environment, Anne Arundel County (Maryland) Watershed Stewards Academy and Anne Arundel County Department of Public Works, the Neighborhood Design Center and Prince George's County, Maryland. The non-profit is able to bring on staff and recruit and train volunteers to magnify the municipality's efforts, often at much lower cost, and to provide technical assistance, such as in community engagement. Where these relationships do not exist today, municipal foresters can foresee a need to create such a partnership. Asked at the end of a focus group to sum up the one thing he would say to a major funder to have the biggest impact on his municipality's work, an urban forester said:

"Get a big non-profit, get a full-time position into a non-profit partner…that would do outreach. And at least maybe a half-time staff person that would do seasonal watering, follow up on those trees… (Provide) training, showing people that want the tree (how to care for the tree)."

2. **A large consortium of agencies and organizations** all working together towards a common goal. An example is the Keystone 10 Million Trees Partnership, bringing together over 200 organizations. Such a consortium offers the opportunity to pool resources for sophisticated research and branding and the development of shared campaign tools. It is also a venue for sharing approaches and best practices, and coordinating effort.

3. **Convening, umbrella, or mentoring relationships**, for example, the role that the Upper Susquehanna Coalition plays networking and supporting the county Soil and Water Conservation Districts around tree-related work in the New York and Northern Pennsylvania Counties of the Chesapeake Bay watershed. This involves regular meetings to share information, frequent training opportunities, formal and informal mentoring and support, and an important coordinating role ensuring that landowners are always matched with the technical help they need to pursue, install, and maintain their buffer.

   "So when we're out there meeting with landowners to talk about easements or whatever else, we've really served as that handholding partner between the landowner and the technical service agency, because as many of you probably know, their dockets are pretty full too. So if the landowner isn't persistent and trying to follow through with something, it really falls off the docket for soil and water or anyone else, because they have so many other projects to get to."

4. **Partnerships between large, regional non-profits and local tree projects**, combining large capacity and reach – including the ability to pursue and manage large grants to support local work – with local knowledge and community relationships. The Alliance for the Chesapeake Bay has many such relationships. Another compelling example explored through this work is the partnership between the Chesapeake Bay Foundation and community leaders in the underserved neighborhoods of Southside Richmond to form Southside ReLeaf.

   "*And when you have people like that at these big organizations that really get the struggle, understand our challenges, it makes it that much easier to really do the work. And so, I'm just thankful that there are people like her and her team that can…champion some of the things that we've been talking about."*

Ingredient #6: Authentic Neighbor-to-Neighbor Recommendations

One of the most successful motivators for planting trees, practitioners pointed out, is knowing that your neighbor has planted a tree or a streamside buffer and is happy with the result. In various ways, tree programs are attempting to deputize those property owners as ambassadors, Identifying "champion landowners" to motivate their peers.

"If a landowner has a good experience, (they're) going to tell their neighbor or other people that they associate with."

Practitioners in buffer programs talked about the positive impact of farmers hearing about trees from neighbors they respect, who can relate to their situation. These connections can be made in all the ways that neighbors traditionally communicate – through visits or phone conversations or an old-fashioned letter. The tree program can also use its own channels to push out information about satisfied landowners, including social media.

> *"We found when we did a social media push, that the posts that talked about stories of other landowners that had had these things planted and they liked their planting and they were happy with their buffer, performed by far the best. If we could tell a story about a human being that did this, that doesn't work for the government or another organization, that just is a normal person that thought this was important to do, them telling their stories seemed to be the most compelling bits of outreach that we had."*

Part of this strategy involves taking the tree campaign to the audience, working through their own built-in gatherings. People are already gathering in a like-minded setting characterized by trust. The tree messaging will gain more currency in such a setting. This practitioner gives the example of an agricultural audience, but one could imagine applying this same principle to other audience segments.

> *"There's tons of different meetings that farmers are putting on for themselves to talk about different practices… They kind of talk to each other and they trust each other. So attending those meetings instead of creating another meeting (and saying), 'Hey, you guys come to us.' (Instead) you kind of go to them. So that's been successful, I would say."*

This neighbor-as-specifier strategy can be successful in an urban setting, too. Casey Trees, working in DC, has developed a program of leveraging neighbor-to-neighbor relationships, using a variety of tools to follow up and encourage the new tree owner to spread the word.

It is not just larger players like Casey Trees who have figured this out. These principles work just as well in smaller programs with far fewer resources. For example, the municipal tree program in Bowie, Maryland was having a hard time gaining traction with residents, but suddenly found that neighbor-to-neighbor communication on the social media platform Nextdoor provided an unplanned and overwhelming success.

> *"We have a couple of those big electronic signs around the city so we post them there. We post them in our newsletter. When Bowie had a paper, which was up until a couple months ago, we would put ads in there. All of these. We'd post flyers at libraries and businesses and whatever. All of this and Facebook and social, all of that. And the vast majority of 'How did you learn about our program?' answers were Nextdoor, and we didn't even post it. It was like one person who got a tree and then posted it. And I'm telling you overnight I got 27 requests for trees. Almost all of them are from Nextdoor."*

How can that viral success be replicated? The Elizabeth River Project, Tree Fredericksburg, and others are asking residents to send pictures of their new trees or *with* their trees after they are planted, providing perfect fodder for a social media campaign. Naturally, branding a hashtag and encouraging residents to push these pictures out to their own social media networks can quickly spread the word in the community.

However it is done, leveraging these neighbor-to-neighbor relationships is one of the most persuasive techniques tree programs can employ in their communities – and often at low cost.

Ingredient #7: Sustained, Mutually Reinforcing Outreach

Beyond the important and labor-intensive relationship building that was discussed in Ingredient #1, tree campaigns that appear to be having the most impact with their public outreach are using a coordinated and sustained method of outreach. They are designing communications that have consistent messaging and delivering them through multiple channels that reinforce each other. They are thinking about priority audiences and focusing their efforts on those constituents. And they are identifying trusted messengers and the best communications channels, and bringing those to bear. This multi-layered, reinforcing approach is a fundamental best practice in public outreach and communications.

An example of this method, discussed elsewhere in this report, is the coordinated effort by Casey Trees in DC to encourage tree requests using multiple means:

- Advertising at bus stops and Metro stations in priority neighborhoods promoting the availability of free trees.
- Mailing of a welcome packet to new homeowners in these neighborhoods (acquired through a purchased list) offering a free tree.
- Community ambassadors in these neighborhoods encouraging their friends and neighbors to plant a tree.
- Once a tree is installed, providing that homeowner with a "spread the word" packet of outreach tools that they can use in engaging their friends and neighbors.
- Door hangers on houses surrounding the newly planted tree, encouraging residents to request their own tree.
- Branded watering bags on new trees, driving people to the website where they can request a tree.
- And soon, a QR code on the tree and other materials driving people to the website.

The impact of such a coordinated effort is to create a sense of momentum. As residents are noticing new trees, they are encountering invitations to request their own tree. Eventually, requesting and caring for trees becomes a norm, and the effort multiples.

Supporting Innovative Outreach Efforts

In these interviews, we heard about other innovative and coordinated efforts across the watershed. For example, there was a pilot effort in the Lower Susquehanna region of Pennsylvania and the James River in Virginia to overlay landowners' consumer and lifestyle data on a GIS map of unbuffered streams. The exercise compared the characteristics of landowners with gaps in buffer coverage to landowners who *had* installed buffers, in an effort to identify the closest matches – and therefore the most likely adopters of new buffers. This data analysis, undertaken by former Penn State professor Dr. Alex Metcalf (now at the University of Montana) also provided guidance on the communications channels and approaches that might succeed with these high-priority landowners.

Practitioners suggested that executing an outreach strategy with such a sophisticated dataset would involve selecting a technical contractor who understands this approach and has the ability to implement it, for example marketing and communications agencies. Some practitioners said they would like help creating an RFP and evaluating bids from technical assistance providers to the right match, and someone who is skilled. Finding the right provider is key to success.

The Power of Images of Trees

As part of a compelling, coordinated outreach effort, practitioners said that images are critical. Landowners want to see what a successful buffer looks like – not just the planting phase or a streamside populated by tree tubes, but also five or ten years down the road. Homeowners and community members want to see beautiful trees in urban settings. And everyone wants to see illustrated the relationship between people and their trees – not necessarily a group of volunteers on planting day standing together with their shovels for the camera, but candid shots and expressive close-ups of individuals, families, and small groups enjoying, and proud of, their new trees.

Practitioners stressed the importance of images, and the difficulty in creating or finding them. They would welcome an image library available to them online, perhaps an expansion of the Bay Program's image library focusing on trees.

> *"Also take pictures. Oh, my goodness. We would take new pictures. It was so hard to find nice pictures of tree plantings that looked like anything besides sticks in the ground or plastic tubes to help someone want what we were offering. So, I certainly think we will continue to take pictures between now and then and hopefully be able to update the outreach materials with some better high-res images that actually show what we're trying to show."*

Facebook and Instagram are tools that few practitioners mentioned, but which are designed to do exactly this job. Some practitioners are using social media effectively, but training and support for how to manage a vibrant social media account would be beneficial.

> *"Photos are what get the attention on Facebook. So I'm sharing new buffer plantings. They look gorgeous, all in their neat rows when a contractor plants them. And people like to see the kids, the students."*

In working with faith communities, Interfaith Partners for the Chesapeake found it helpful to put together a viewbook, to help congregations visualize the types of trees they might select for their properties.

> *"We also did put together for the Trees for Peace, a little look book of, this is what your tree will look like in the spring. And this is what your tree will look like in the fall. I think people have a hard time …visualizing what they're actually getting when they get that little thing in a one-gallon pot. It's like, 'What is it going to grow into?' And even though there's plenty of information on the Internet, we created a book that we were able to send out to the congregations to say, 'Here's what you can choose from.' And that seemed to help them make selections."*

In addition to encouraging adoption of trees, images can help change normative perceptions of what a healthy stream or community looks like. A practitioner who works in both rural and suburban communities said the image of a "healthy stream" in the minds of many constituents is a stream that is

manicured, surrounded by carefully managed vegetation. Changing that perception requires imagery that normalizes a more natural stream, while ultimately taking local sensibilities taken into account.

> *"One of the things that I think about all the time in our outreach and communication strategy is starting to normalize both the appearance of what an actual healthy stream looks like, which isn't the ones you see running through the middle of public golf courses, which a lot of people think is what a healthy stream looks like. Perfectly trim, neat edges, everything just beautifully lined up. So just getting away from that image in artwork, in anything that we use, but also normalizing the idea that buffers don't have to be completely wild looking."*

How to Do Tree Seedling Giveaways Successfully

Tree seedling giveaways are common across the watershed. Residents happily pick up the free seedling from the tree program's table at the community event, much like they would pick up a free keychain or refrigerator magnet. Do they put the tree in the ground, put it the right place, care for the tree once planted?

Some tree campaigns have learned how to do tree giveaways effectively. Tree Fredericksburg is a good example. Over time, they calibrated their efforts, gravitating towards a more substantial but still relatively inexpensive one-gallon pot, backed up by providing a planting tutorial video, and a feedback mechanism to help ensure the tree was planted. These extra steps are essential to making tree giveaways more of a success.

> *"Now we do one-gallon trees that cost us about $5. We also do shrubs and I see them all over town. …we send out an email to folks and ask them to take a picture of their tree and send it back to us. And we get a pretty good response. It's something, it's in a pot, it goes home. They can water it and it can stay there for quite a while. And we have a video that teaches them how to plant it. So it's just, you scan a QR code, it takes you right to the video and that helps a lot too."*

Tree giveaways can be effective when they are tied to an educational program. A practitioner described a Vacation Bible School program that included educational content about tree care, and free trees provided by the Forest Service.

> *"We got some donated trees and the kids came by, and each kid – it was like 60 or 70 kids – each came by and picked up one tree. And they were going to plant that tree in their yard and take care of that tree, because parents were trying to get their kids out of the house. So this was a great way to get kids outside, caring for a tree and watching the rain and knowing when they needed to water."*

Ingredient #8: Simple, Flexible Program Design and Approach

Some of the most successful tree programs are finding ways to make their programs simpler, more flexible, and more responsive to potential participants.

It is well-known that government buffering programs can be restrictive and sometimes unattractive to landowners, for example requiring long-term contracts, or large up-front financial outlays by the

property owner that are only reimbursed later. These complexities cause some local partners to shy away from even offering the programs.

For their part, public sector urban tree projects sometimes run into limitations created by procurement rules, causing them to cap or limit the size of their programs, even if additional money and willing tree recipients are available. Other urban programs can make it complicated even to request trees.

Tree advocates are finding ways to innovate programs to address these challenges. They are channeling ancillary funding to fill in program gaps, offering training for their local partners, and finding ways to simply the application process. Here are examples:

- Upper Susquehanna Coalition, which works extensively with county ag offices, explained that some county agents found CREP to be too complicated and did not want to implement it. So USC designed programs using more flexible dollars, and tailored them to what the county ag offices were asking for, and offered them frequent training and support.

  "So it was easy at that point to develop something because (the county ag offices) were telling me what they wanted. 'We want a simple program, we want a simple application, we want you or someone like you to come out and talk to us about what you think could be planted here,' because not everybody had the same technical expertise. They could maybe identify an area that the practice could be put, but they didn't know how to plan it. So it started off with trying to develop just an easy program and then ever since, it's been, 'Okay, now we just have to provide trainings, constant trainings.' … So we utilize those opportunities to provide training that our districts want but that other districts can also utilize. So we train…and get great numbers."

- Piedmont Environmental Council developed flexible financing to address gaps in government funding. They raise money from private donors to fill in these gaps, for example raising a 75% cost share to 100%, or financing upfront costs for landowners in the form of 0% interest loans, which are later reimbursed by the government program.

  "We started to hear from landowners, rural landowners, a lot of farms in our area, that they wanted to participate in riparian buffer programs, such as through Soil and Water or NRCS, but for whatever reason, the program stipulations didn't work for them. So really we just started as a way to fill the gap. So bring in some funding to be able to do these projects for farms where a typical cost share program didn't work for them."

- In an urban tree setting, the District of Columbia introduced a different kind of flexibility, removing the copay for a new tree, which had traditionally been $50 to $100 depending on the type of tree. Simultaneously, their non-profit partner Casey Trees launched a major "free trees" outreach campaign, advertised in Metro stations and on buses in the underserved Wards 5, 7 and 8. "The result was a huge uptake with the number of requests that came in." Removing this barrier and focusing outreach encouraged more tree requests, which in turn created a sense of momentum in these neighborhoods as more and more trees were planted.

  "But also requests (are coming in) from those communities, partially, because I think they're just seeing people planting trees in their yards now. Homes, schools, communities, all of those have significantly gone up since 2018 when we made that copay change."

Creativity and flexibility come in many forms. The District of Columbia's Department of Energy and Environment asks Casey Trees to set aside small allotments of trees that can be provided to individual community volunteers who can get them out into the community quickly and effectively, through individual conversations, without applications or wait times.

> *"(Having trees) ready to go… And then allowing those conversations to happen with (community leaders) over the fence in the church, on the street, in different venues, and getting trees in the ground, outside of the boxes and of our programs, striking while the iron was hot and not requiring people to go through all the rigor of signing up and waiting in the queue and all that."*

This is both program flexibility, and also a recognition that local community leaders are the best advocates for trees and know how to talk with their neighbors and get trees in the ground. As an organizer of another urban program put it,

> *"Getting green teams as well as organizers set up to help fund maintenance and help fund new trees is definitely something that is needed more of. And maybe it should also be more emphasized by the funders…We talked about tree canopy goals, water quality improvements, pounds of nitrogen, pounds of P, but really we need pounds of people."*

SECTION C: PUBLIC OUTREACH GAPS IDENTIFIED BY THIS RESEARCH

There are many success stories that we heard in this project. But this project also identified significant gaps in public outreach capacity and execution. These are the most common gaps.

Gap #1: Technical Assistance and Training

Most often, tree managers are technical experts in planting and maintaining trees. Much less often, they are trained in social science, communications, or public outreach. Focused training, technical assistance, and coaching are needed in the best practices of public outreach and engagement.

- Understandably, the people running tree planting programs are skilled in the technical aspects of planting and maintaining trees, and may not be natural marketers. As one said, practitioners often need help to "translate…between our natural resource language and the marketing world language."
- Public outreach mentors or technical assistance providers are seldom in the mix. Tree managers are often developing their own outreach strategies from scratch, or reaching out informally to peers to help them do that.
- Project budgets often do not have line items for technical assistance for public outreach. Practitioners suggested that funders are more focused on hard metrics of tree planting and do not usually fund outreach. That may often be true, but it was also clear that practitioners just may not think that they can ask.
- Some practitioners indicated that they do not know how to hire technical assistance providers, including how to write an RFP and how to evaluate the responses. They may never have done so in their career, and could use some practical help in those areas.
- The result is that many tree campaigns are pursuing a simple approach to getting trees in the ground, like a single-shot mailing or giving away free tree seedlings at a community event, rather than developing a sustained outreach campaign that adheres to best practices and creates a social environment that would multiply their efforts.
- Some tree programs are simply responding to the influx of property owners who request trees, whether or not additional trees are needed in those locations. In essence, these programs open their doors, and community members who want trees flood them with requests. But as several tree program managers pointed out, in time those self-identified tree requests taper off, leaving large areas of the community – often areas with the least tree canopy – unaddressed.
- When their efforts do not meet expectations, it leaves many of the tree campaign managers we interviewed feeling the stress of having to identify and cultivate new willing property owners, without the tools or know-how to do so. This realization created or reinforced a sense among some practitioners that outreach could be smarter or more focused than it is today.

  "I'm seeing numbers decline. …both in terms of volunteers, and in terms of...landowners. That's a limiting factor for us is finding bodies to do the work and finding properties to do the work on."

Gap #2: Understanding the Motivations of New Audiences

Tree planting campaigns rarely employ tools to understand their audience beyond using their staff's own intuitive listening skills. This gap becomes especially important as practitioners are pushed to address unfamiliar audiences. Enabling better audience understanding is critical to effective outreach.

- This inquiry has identified the fact that there is a striking lack of formal audience research or understanding related to tree planting and maintenance. The most sophisticated audience understanding that practitioners exhibited in this project was among agricultural landowners, where buffer practitioners have lavished significant time building relationships with individual farmers. Practitioners were the first to admit that they often do not know much about the motivations of other audiences, when it comes to either buffers or urban tree programs.
- It became clear that most of the people running high-performing buffer campaigns are themselves intuitive, patient listeners who take the time to get to know landowners on a personal level, understanding their motivations, and their aspirations for their land. But not all tree program managers have this intuitive listening skill. And it is not practical to expect practitioners to have an intuitive understanding of audience motivations when scaling programs up to a community or regional level, where the audience map becomes complex and the number of individual property owners multiplies exponentially.
- New urban tree locations are often pinpointed based solely on biophysical analysis focused on gaps in tree canopy or available tree wells, not taking into account the receptiveness of the community to the campaign, or the willingness and interest of community members to take care of the trees once planted.
- Urban tree managers often acknowledged that they know little about homeowner motivations at all, let alone how to engage them. They are designing outreach campaigns in an absence of information.

  "I just don't know... I'm just frustrated. I just don't know how to reach people."

- Often today, GIS analysis of underserved neighborhoods is driving the direction of urban tree programs, which moves tree planting into neighborhoods where the community may not be asking for trees, or may have significant doubts about trees, elevating the importance of understanding the community's authentic needs and priorities. Prioritization mapping is the "key to getting grant funding" in the words of an urban forester, but funders are not equally prioritizing competent audience engagement in these new neighborhoods.
- It is unclear whether tree canopy goals, or even tree-planting goals, are motivating to the public. Practitioners said that tree canopy goals – expressed as a percentage – are not understood by the public, due to the esoteric nature of the goal, and the difficulty raising canopy by just a few percentage points. The jury is out on the impact of audacious goals like the 5 million tree goal in Maryland and the 10 million tree goal in Pennsylvania. Little research has been done.
- As a bottom line, limited budgets and staff capacity can make it difficult to invest in the foundational work of better audience understanding.

Gap #3: Lack of Systematic Networking and Collaboration among Tree Practitioners

Collaboration and coordinated communication among tree planting practitioners is uneven, and the sharing of best practices and lessons learned in public outreach is very limited in the tree planting community. Tree planting practitioners, particularly those running smaller campaigns, would benefit from more intentional networking and sharing of best practices in outreach.

- In these discussions, it appeared that some practitioners were well networked with their peers. In some parts of the watershed, this type of networking is intentional, with a goal not just of information sharing but of mutual support. But that is not the norm.
- A surprising number of practitioners were not aware of or are overlooked by these types of collaborative forums.

"We haven't had sharing sessions or individual contact with anybody, and I'm hoping to reestablish that."

- Where networking discussions do occur, they appear heavily weighted towards technical issues of tree planting and maintenance. Strategies for public outreach, sharing of outreach best practices and tools, troubleshooting problems, or actual training in public outreach techniques – these things are not happening on a widespread basis.
- It was striking in these interviews that successful programs have had to actually create and innovate their tree program and community engagement model from scratch, rather than receiving support and guidance from a central entity or formal network. There appears to be no road map for a municipality or a non-profit that wants to build out a successful tree program. But there could be, as there are plenty of compelling success stories happening all around the watershed, as we heard in these discussions. These successful models are just not being systematically shared today.
- A practitioner who works with multiple municipalities emphasized how important organized and purposeful collaboration will be in the future, as tree programs and practitioners only continue to multiply.

"The next few years are going to be quite literally revolutionary for urban forestry. And I think a lot of people are going to start coming out to try to plant trees, with varying levels of experience, and wherewithal, and knowledge."

- Occasionally, there is too much collaboration – in other words, too many meetings with too little output. The extensive collaborative energy that exists today needs to be more structured, coordinated, and thoughtfully managed so that individual partners do not become consumed by it.
- Outreach campaigns are generating leads that are sometimes handed off to partners, and there is often little knowledge of the outcomes with those landowners. Due to lack of coordination and systematized information sharing, some landowners are being contacted by multiple partners, and others are falling through the cracks.

Gap #4: Funding Constraints

Successful public engagement is constrained by public sector procurement rules and large funders' tight focus on the number of trees that go in the ground, which devalue the task of building community participation and buy-in. These funding criteria must be reexamined – if public outreach is a priority.

- We heard that procurement rules sometimes limit the size of projects, even if additional funding is available and there is additional interest in trees. Keeping projects under a certain dollar limit can avoid triggering a protracted approval process or a requirement for competitive bidding – which is causing some tree managers to limit the size of their programs. Sometimes these thresholds are quite low.
- Whether a real limitation or perceived, many tree practitioners assert that funders do not value public outreach in the award process, but base their criteria only on natural science metrics. If outreach is funded, it may only be for the hard costs of hosting an event, for example, not for the soft cost of the extensive staff time needed to build relationships with landowners or community members and to listen intentionally to their motivations and needs.

Gap #5: Program Inflexibility

Government programs meant to encourage tree planting are often complicated and restrictive, making them unattractive to some landowners and complicated and difficult for all but expert tree practitioners to offer. More flexible funding must be a priority watershed-wide.

- Long-term contracts, significant up-front cost outlays, and difficult application processes for some government programs are making them less attractive to landowners.
- These kinds of complications are making it less likely that important strategic partners like Soil and Water Conservation District staff – who are highly trusted by the landowner audience but who already have many other priorities on their plate in addition to tree planting – will actually go to the trouble of offering these programs.
- A handful of organizations that are managing tree programs have been able to find other resources to supplement these restricted government programs, fill in their gaps, or supplant them. But that is the exception. Most tree managers do not have the resources to find those supplemental funds, or the capacity to innovate flexible new programs.

Gap #6: Lack of Availability of Basic Outreach Tools

It is a bottom line finding of this work that basic outreach tools and competencies are often lacking, with too little training in public outreach and too little sharing of successful and creative tools. When good tools are created, they must be made available freely and widely.

- Lacking Images: Practitioners said they need more images of successful tree projects – not just tree planting photos, but images of more mature projects. Landowners who are candidates for buffers want to know how their project will look in one year, five years, ten years. Community residents want to visualize the impact on their streets. Photos of people with their trees would be motivating. Several practitioners said they do not have the staff capacity or perhaps the in-house expertise to create and curate these images.

- Social Media Training: Social media are tailor-made to deliver images to the audience while leveraging the networks of trusted neighbors who are ambassadors for tree planting. While some organizations and practitioners are doing a good job with social media, it was seldom mentioned in these interviews. Much more can be done to encourage its smart use by tree programs.
- Lack of Basic Outreach Tools: We heard about door hangers, new resident welcome packets, branded watering bags, tree request landing pages, postcards and letters, and various other outreach tools. But many tree campaigns are relying on single-shot mailings or tree whip giveaways as their form of outreach, rather than employing a more sustained and reinforcing method, using multiple tools and techniques. They may not have the capacity or technical support to develop these outreach tools. There appears to be only limited sharing of outreach tools across organizations, which would help broaden and deepen many campaigns.

Gap #7: Little Emphasis on Evaluation

Tree campaigns are doing very little evaluation of their public outreach efforts.

- This research uncovered another kind of program inflexibility that has a direct bearing on public outreach. Managers of tree campaigns pointed out repeatedly in these interviews that the evaluation of grants is often heavily weighted towards the physical aspects of planting, and does not accommodate a well-researched, sustained public outreach effort. Campaigns tend to evaluate their efforts by counting things: the number of trees or acres planted, the number of parcels involved, the number of trees that survive, etc. Such metrics are often built into their accountability reporting to their funder or local or state jurisdiction.
- Beyond such funder-driven metrics, tree managers said they do not have the staff capacity or expertise to evaluate their program in other ways, for example the success of their public outreach.
- There is no common understanding of what those evaluation metrics should even be, beyond the number of trees that go in the ground, acres planted, or perhaps the number of volunteers that come out for a planting day. There is almost no thought today about the possibility of focusing on measures such as landowners' improved likelihood to plant and maintain trees, a shift in public attitudes towards stream buffering or tree canopy in a local community, willingness to advocate, recall of a campaign, or other social indicators.

> *"I'm just going to be blunt…but it's really about funding the long game for outreach. …I mean, you can put outreach into your proposal if it's going to immediately turn into X number of trees and X number of nutrients and sediment reductions, but outreach is human. It's like intelligence work and it's a long game. I mean, sometimes it could take us five visits with a particular person, whether you're on the phone or you're out at their land, and then you get back with them, and then you're just planning, and it takes time."*

Throughout these conversations, practitioners who are successful at public outreach pointed out that engaged landowners and community members who are listened to and cultivated will care for their trees over the long run, helping ensure long-term success of tree planting, and helping propagate interest in trees much further.

Following is a set of recommendations based on these interviews to help address these gaps and move public outreach forward.

SECTION D: BAYWIDE RECOMMENDATIONS FOR IMPROVING PUBLIC OUTREACH

This project is premised on the idea that more effective public outreach and engagement will advance tree planting goals, and will help ensure that the trees are cared for and maintained long after they are planted. Landowners, homeowners, and community members who are involved in the process of planning buffers and urban tree planting will not only create more demand for trees today, they will also become advocates who will increase tree adoption within their personal and community networks in the future.

Though some of the recommendations below may appear ambitious or costly, they are intended to move public outreach on behalf of trees significantly forward. While practitioners asked for some of these things directly, most of these recommendations are the result of synthesis, reflecting the needs of the practitioners who are running tree planting and maintenance campaigns all across the watershed. These recommendations are based on an understanding of what a watershed-wide tree planting strategy truly rooted in the best practices of public outreach would look like.

This report boils down into three major recommendations:

1. Baywide Staff and Support for a Focused Public Engagement Strategy

One of the key takeaways from this work is how siloed tree efforts can be, despite a lot of collaborative energy within the Forestry community. Great successes in one part of the watershed may not be known to active practitioners in a neighboring region or state. Managers of start-up tree campaigns may receive some mentoring, but they are often having to figure things out on their own, or reach out informally to peers they know for ideas and best practices, rather than having access to an established network of mentorship and advice, and a playbook for how to engage their communities.

There is a significant need for coordination, encouragement, training, and strategic direction of outreach from the Chesapeake Bay Program level, by a staff team that understands tree planting and maintenance, while being steeped in social science and communications. This commitment would be reflected by these actions:

- Create a new Baywide staff position, a Forestry Outreach Coordinator, housed in the Bay Program's Communications Office, to support tree campaigns with a coordinated outreach strategy and toolkit, including bringing practitioners together for networking and training around public outreach.
- Identify, make visible, and support with resources a cadre of mentors, recruited from among the successful tree practitioners in various parts of the watershed (creating a career pipeline for people who feel they have topped out in their current positions).
- In addition, identify and network a corps of external technical assistance providers who will be available to tree programs to expand their capacity to implement public outreach and engagement efforts – such as marketing and communications agencies, graphic designers, writers, audience researchers, etc.
- Play a role in the intentional networking of tree practitioners as described in Recommendation #3, below.
- Encourage funders to formalize public outreach and community engagement requirements and evaluation in grant RFPs, and to follow that up with sufficient funding for those efforts. Consider

setting up a dedicated grant pool for practitioners who are seeking specifically to establish good public outreach practices for their local program.

2. A Web Portal to Aggregate Public Outreach Tools and Best Practices Information

To aid the sharing of expertise and best practices, as well as the practical tools used in outreach, the Forestry community should create an online clearinghouse and promote it heavily among tree planters all across the watershed. The Bay Program has pioneered this approach in support of public outreach and engagement with its ChesapeakeBehaviorChange.org portal, which has been designed as a one-stop resource for local practitioners who are trying to encourage individual stewardship behaviors in their communities.

ChesapeakeTrees.net is an existing resource that could be updated to more intentionally support public outreach that tree campaigns need. An updated portal would:

- Share effective public outreach tools and templates for practitioners to download and adapt. This can include sample letters, emails, door hangers, postcards, web content, etc.
- Share messaging advice and relevant audience research for multiple audiences – beyond the agricultural landowner and traditional environmentally motivated audiences, which are already well-understood. This is particularly important today, given the equity mapping which is driving tree efforts into new neighborhoods with differing priorities.
- Curate and host an image library, with content contributed by various local tree campaigns, augmented by the Bay Program's professional photography resources.
- Outline successful public outreach models and campaign plans, like some of those recognized in this report, for others to emulate in their own settings.
- Provide a primer on essential best practices, such as how to understand audiences, identify trusted messengers, do outreach that is mutually reinforcing, etc.

3. Systematic Coordination of Networking and Frequent Training

There is a great deal of collaborative discussion underway in the Forestry community. But there is little focus in those conversations on building public outreach capacity and expertise. And many practitioners are not tied into these collaborative conversations at all. Tree-related outreach would be greatly improved if the Bay Program and its partners would:

- Regularly bring together tree managers for sharing best practices in public outreach and focused training opportunities. Coordinate these gatherings at a Baywide level, but give attention to community type (urban, suburban, small town, rural) and buffer vs. urban tree programs.
- Expand and continually update the database of tree campaigns and their key staff people that was created through this project, to help ensure that every practitioner can be included in these coordinated networking and training opportunities.
- Produce agendas for these meetings that include rich public outreach content, along with the technical content related to tree planting and maintenance that tree managers will want and need.
- Cultivate and train colleagues, such as Soil and Water Conservation Districts, who are not *exclusively* focused on tree planting and maintenance, but who are valuable partners in those efforts.

- Encourage a regional strategy of messaging and branding based on what has been shown to work. That means staying actively engaged with tree campaigns that are producing the best results. Fund a deeper toolkit for those most effective campaigns and make those tools available so that other practitioners throughout the watershed will adopt and use them.

As a result of this deep inquiry, we submit these three recommendations to the Chesapeake Bay Program and its partners: a Baywide commitment to staffing and funding, a web portal to aggregate and share public outreach tools and best practices, and a much more systematic approach to networking and training practitioners in public outreach techniques.

It has been a privilege to undertake this important work, and we stand ready to offer additional interpretation and context to these findings as needed.

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