

# LAND TRUST ALLIANCE WASHINGTON, D.C.

## STANDARDS REVISION THROUGH DIGITAL COLLABORATION

### WHO

Land Trust Alliance used Ethelo to engage more than 1,100 members across the USA

### GOAL

Focus multiple insights expediently to update the Land Trust Standards & Practices

### HOW

Ethelo's platform served as an open forum to rate, comment, and propose new wordings for the revised version of the standard

### OUTCOME

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The quality of focused input from members provided clear and efficient policy direction to the management

The Land Trust Alliance needed a seamless way to update its Land Trust Standards and Practices. Ethelo functioned as a forum to evaluate the new contents and wordings of the Standard. Integrating 2,000 comments with ratings from 350+ members across the USA, the platform's outcome provided a clear indication of elements with high levels of approval as well as those needing further rewording. Ethelo saved around 150 hours of staff time.

## BACKGROUND & APPROACH

# ETHELO'S PLATFORM SERVED AS AN OPEN FORUM TO RATE, COMMENT ON AND PROPOSE NEW WORDING FOR THE REVISED VERSION

With over 1,100 land trust members across the United States, the Land Trust Alliance (LTA) is dedicated to responsible land conservation. Since 2005, the LTA has been relying on the Land Trust Standards and Practices as the essential policy roadmap to help preserve public trust and run an effective organization.

After serving for 10 years, the policy roadmap was in clear need of revision. This led the advisory team to put forward a Discussion Draft with a set of revised standards. Wanting a document “of” and “for” the land trust community, the LTA needed a way for the community to collaborate, regardless of time zone or location.

There was a recognized need for online, real-time dialogue that supported moderation. The goal was to reach out to their nation-wide membership in order to assess the overall support for each of the 62 practices (and their 105 specific elements) of the newly proposed Standard.

*“We are a national organization with limited capacity to meet face to face with all of our members in a narrow time frame. We needed a way to hear from our members and partners in an authentic, integrated and straight-forward way as we worked to revise our industry standards.*

*The Ethelo platform enabled staff and volunteers to participate in a national conversation about how our industry is changing. We also recognize that being part of this active process will help when the time comes for organizations to implement these changes.”*

# HOW ETHELO'S CAPABILITIES HELPED STREAMLINE THE EVALUATION

## STRUCTURED COLLABORATION

The platform grouped all the elements under discussion into their corresponding practices (and each of these into their own 12 Standards). Ethelo's opening visual panel allowed participants to quickly navigate to the Standard of their choice (Fig. 1).

Similarly, the expandable drop-down navigation menu allowed users to select any specific element they wanted to evaluate (Fig. 2).

The 62 practices were expressed in a single sentence and presented in an individual dialogue box, as illustrated below (Fig. 3). Each LTA member rated their level of support for each statement, added relevant commentary, and replied to or liked other members' contributions. *"The limitations of opaque surveys are evident. We live in 2016; we need participants to interact with each other in an open process."*

## Accountability

The LTA recognized that online surveys and collaborative documents came with trade-offs: either quick but disjointed insights, or costly analysis at the end of the process. Ethelo bypassed such limitations by allowing LTA members to preview the new Standards in an organized way, while simultaneously allowing for seamless rating and dialogue experiences.

In addition to a firm grasp on levels of support for each of the proposed standards, the open dialogue



Figure 1. Opening panel: a quick visual shortcut to each of the 12 Standards



Figure 2. Main navigation panel, with expanding features to simplify navigability



Figure 3. Rating and social dialogue box, used to evaluate each of the 105 elements

also enabled the management team to have an evolving record of the evaluation. *"This has been an incredible learning experience for us. We are definitely reaping the benefits of this online platform and are thrilled that it was as successful as it was. The Ethelo team has been terrific to work with."*

*"We needed to revise and mark up a text-heavy document. After looking at all the major public participation and group decision platforms, we found Ethelo to be the best fit."*

# TURNING INPUTS INTO ACTIONABLE INSIGHT

Of the 357 LTA members who registered into Ethelo, 172 voted and added meaningful commentary. This accounted for an overall participation rate of 48%. The rate differed according to the participants' roles: While members who didn't specify their relationship to the LTA had a 28% average participation rate, the rate for LTA staff, board members, and consultants ranged from 67% to 82%.

## A SEAMLESS WAY TO IDENTIFY AREAS OF PRIORITY

A total of 2,004 comments were collected across the 151 elements – a considerable amount that left the management team in need of direction as to where to prioritize attention. Drawing on this broad range of input, Ethelo deployed its mathematical capabilities to seamlessly identify the elements that did not receive enough collective support (Fig. 4).

Elements with low ratings were clear calls for action, indicating which proposed wording required attention. For this purpose, the LTA drew upon the suggested re-wordings posted by members themselves in Ethelo's integrated comment boxes (Fig. 3, above).

These suggestions could be reviewed by the management team, who could in turn moderate or edit each specific comment-thread. Each element under evaluation had an average of 13.5 comments and 12 likes. This count of 'likes' served as a further indicator as to where to look for valuable ideas, modifications, and proposals.



Figure 4. Excerpt from the Results Panel, summarizing levels of support for the different elements

Instead of drawing on one-way insights, this social dialogue functioned as an internal source of cross-validation, allowing the LTA project managers to quickly identify highly supported concerns and suggestions.

# EFFICIENCIES & GAINS

## ESTIMATED TIME SAVINGS

The project involved two main set of activities. The first set was the set-up of the platform itself, following the LTA's standard > practice > element classification. This required ongoing adjustments between Ethelo and LTA staff to arrive at an interface with an LTA look-and-feel.

The second set was the evaluation of results, which proved to be the major efficiency gain for the LTA management team. For one, it required collecting and then amalgamating the 2,000+ comments with the numerical ratings. But it also required a cross-membership validation of comments - a task seamlessly 'outsourced' by Ethelo's platform to the members themselves.

By integrating votes, comments, and their crowdsourced validation, Ethelo enabled an estimated reduction of 154 LTA staff hours (1 Month FTE). This represented an overall 85% time-saving, delivering actionable results faster than conventional methods.

## AN ENGAGING EXPERIENCE FOR PARTICIPANTS

Ethelo streamlined the voting members' experience as well. As opposed to going through each element on a one-by-one basis, the navigation panel allowed users to jump straight into the standards > practices > elements of their interest.

Perhaps the largest area of time saving was for the members themselves. Nearly 200 hours were estimated to be saved, representing a 65% saving

over alternative methods. *"Ethelo's more expedient way of obtaining feedback reduced the risk of members feeling irritated (or abandoning) what would have otherwise been a more cumbersome survey."*

## COST REDUCTION

Considering only LTA staff time, the cost savings were 38%. With the member time saving included, the savings jumped to 87%.

# NEXT STEPS AHEAD

The granular approach to collecting and prioritizing people's insights allowed the LTA to narrow down on those elements in need of critical attention. After an initial round of consultation extending from March to September 2016, the management team identified several elements from the Standard in need of further member evaluation.

Based on the feedback received, this first evaluation process allowed the management team to adjust the language of some of the elements. A second round of evaluation is taking place from October to December, as a way to refine and finalize the Standards. This second phase will delete all previous ratings and comments, so that LTA members can start afresh and evaluate the modified re-wordings.

*"This has been a very authentic way to show that we in fact have listened to our members. The interaction has been a key component.*

*And the time savings on compiling data and comments are astronomical compared with more traditional survey tools.,,*