The motivations of land owners to donate conservation easements and their property to land trusts

Stephen Wesley Goltry

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The motivations of land owners to donate conservation easements and their property to land trusts

by

Stephen Wesley Goltry

A thesis submitted to the graduate faculty in partial fulfillment of the requirements for the degrees of

MASTER OF LANDSCAPE ARCHITECTURE
MASTER OF COMMUNITY AND REGIONAL PLANNING

Departments: Landscape Architecture
Community and Regional Planning

Majors: Landscape Architecture
Community and Regional Planning

Major Professors: Eric Damian Kelly and Norman L. Dietrich

Iowa State University
Ames, Iowa
1996

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Graduate College
Iowa State University

This is to certify that the Master's thesis of

**Stephen Wesley Goltry**

has met the thesis requirements of Iowa State University

*Signatures have been redacted for privacy*
DEDICATION

In memory of my father, Hiram Judson Goltry

my grandfather, Herschel Urban Goltry

and

to my mother Mary Virginia Scott Goltry
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ABSTRACT

The motivations causing land owners to give land are unique and profound statements that merge human values with land stewardship. Donating land to a land trust sends a message to others that people need to continually reassess their relationship to the land for its intrinsic and utilitarian values. Fifty-three land trusts existed in the United States in 1953. By 1980 the number had reached 400. The number continued to rise dramatically to just over 1,000 in 1990. From 1990 to 1994, the Land Trust Alliance reported a 23 percent increase in membership from 889 to 1095. Within the 1990-1994 period, the amount land in land trusts rose from 2.7 million acres to over 4 million acres (Hocker 1995).

The philanthropic act of giving land to a nonprofit organization appears contrary to the democratic and independent expectations and perceptions of land tenure in the United States. Besides motives of charitable or self-benefiting tax deductibility and land protection desirability, other influences play a role for what motivates land owners to make a decision to participate in this philanthropic act. Given the continued growth of land trusts in the United States, this research study examines philanthropy, social psychology, land-use ethics, conservation easements, and taxation and their relation to what motivates land donors to donate their land to a land trust. This exploratory study identifies donors' additional motivating factors such as those influences that are obscured behind the assumedly obvious reasons people donate land such as "to protect land from unwanted development" or "to reduce of federal estate taxes."

This research explored landowners' motivations for donating conservation easements and their property to land trusts. A nationwide survey of 104 land trust administrators was undertaken to ascertain the attitudes, beliefs, characteristics, and opinions that influenced land owners to donate lands. This research provides a context for future exploration of land donor motivation. Increased knowledge about land donor motivation can enhance land trust administrators' land acquisition programs appreciably. Altogether, this study will further the understanding of what motivates a land owner to give land to a land trust.
CHAPTER I
INTRODUCTION

The Motivation Setting

This research study explores what motivates a land owner to give land to a land trust. Society continually assesses the natural landscape for its utilitarian and intrinsic values. It is the intent of this research to identify as nearly as possible those motives which act collectively to merge humanistic values of philanthropy with land stewardship. Donating a gift of land sends a message to society about how people value their relationship to the cultural and natural environment. The motivation to give land, to some degree, is contrary to Western beliefs, particularly in a capitalistic society. Private land property ownership is one of life's major achievements and is representative of societal and individual soundness and the power that goes with it (Sargent and others 1991, 215).

Other influences go beyond the tax benefits and one's desire to protect land, moving a land owner to specifically contribute either land fee simple or development rights of property to a land trust. The information obtained through a nationwide survey of land trust administrators as part of the present research study provides a broader insight to the spectrum of motivating influences that surround a land donor's actions. Such a survey contributes valuable knowledge, and sets the stage for those seeking a more insightful and efficient process for understanding land donors, the development of land gifts, and the further enhancement of the role of the land trust in the community.

It may seem that a land owner's motives to give land would occur through some of the same influences associated with donors who give regular and substantial gifts to charity. In this context, it may be fair to say land donors are driven by altruism, egoism, greed, or any combination of these motivating influences. A partial understanding of land donor motivation begins with a perspective on wealthy donors' motivations to contribute to the establishment of foundations. Joseph (1987), President of the Council on Foundations, Inc., states:
Attempts to understand the motives and instincts of the giver are not only rare but also go against the anonymity most public benefactors seek. If, however, it is possible to identify the influences and other factors that lead to the establishment of foundations without violating other dimensions of privacy, it may be possible to determine what strategies may be appropriate in encouraging and promoting the growth of organized philanthropy (p. vi).

Land donor motivation may be more easily understood by placing the role of the land donor to a land a trust in the context of America's private foundations. Joseph continues:

Private foundations are only one kind of private initiative that can help alleviate social problems, extend social benefits, and contribute to desirable social change. . . The importance of a foundation is far greater than suggested by simply looking at the amount contributed. As a free-standing alternative to the government process, a private foundation provides for independently organized consideration of the public interest. Private foundations reaffirm basic values and goals. When wealthy individuals and families commit themselves to establishing and endowing a foundation, they send a strong signal to the rest of society about the enduring spirit that gave birth to—and continues to energize—our democracy (p. vii).

The human forces of motivation and instinct play the largest role when the land giving act occurs in the context of a legally established nonprofit conservation organization—a land trust (Brenneman 1982, 142). The mission and spirit of land trusts along with their philanthropic and land stewardship processes tend to resemble noteworthy philanthropic institutions and charities throughout America. The Carnegie Foundation, the Rockefeller Foundation, the Sage Foundation, and the Kellogg Foundation exemplify nonprofit organizations whose founders had personal visions of the society in which they wanted to promote their philanthropic ideologies (Odendahl 1987, 1). It is entirely possible strong similarities exist between established nonprofit charitable organizations and land trusts, making it possible to view land donor motivation as an extension of philanthropy. If so, the possibility that the motivations of land donors, may in part, have similar influences as those motivating very wealthy individuals to make donations and to perform charitable acts (Appendix I, Roper Center Survey).

A study conducted in 1984 by a consultant specializing in nonprofit organizations and their financial resource development personnel interviewed 20 individuals who gave more
than one million dollars in one year. Through this study, 22 motivations were identified as being expressed by one or more of the philanthropists for why they made a contribution (Prince and File 1994, 3). These motivations included:

1) community responsibility and civic pride;
2) tax considerations; and
3) religious or spiritual affiliation of the institution.

Similarly, Boris’s study in 1987 discovered six motivational areas contributing to donor motivation for establishing foundations. These motivational areas included:

1) altruism;
2) beliefs;
3) instrumental motives;
4) memorializing; and
5) community and peer pressure (Prince and File 1994, 4).

Establishing Precedence

This work attempts to provide significant research on the subject of land donor motivation (Appendix II, Researcher’s Interview Journal). Since the 1950s, it has been suspected this form of American philanthropy has been gradually emerging to signal a shift towards a new dimension in our American gift-giving values (Land Trust Alliance 1995, 8). By observing donor motivation from the American philanthropic perspective, one may notice the land donor-land trust phenomenon exhibits motivational philanthropic characteristics very similar to those associated with the American wealthy donor-private foundation event. Subsequently, identifying the similarities of this latter group may guide the present inquiry towards detecting the motivations of land owners who give their land to land trusts.

As initial research, this study resonates the beginning of an ever increasing new occurrence for how society passes on its legacy for caring about its cultural and natural environment. It is anticipated the research results should stimulate further inquiry about how American philanthropy will deal with its wealth and resources. Research that raises the awareness about land donor motivation within the institutional philanthropic community
may encourage the opinions and values of private land owners to raise their philanthropic priorities to become more sensitive to the value in protecting special landscapes through land gift contributions. Finally, these research findings should stimulate a continued support for land trusts to play an integral role in shaping values, determining policies, and implementing programs for community, regional, state, and national governments.

**Exploring Land Donor Motivation**

Examining land donor motivation initiates several premises. Generally, a land owner acting voluntarily will be motivated to donate lands for environmental, financial, or altruistic purposes (Beatley 1994, 105). First, a land owner may be motivated to donate property or a conservation easement to receive charitable tax deductibility made available when land is donated to a land trust. Second, the land owner may contribute the land donation out of a genuine desire to protect unique lands or habitats from the perspective of unwanted future changes such as impinging land development. Third, a land owner may gift the land as a means to preserve a unique cultural or natural resource for generations to come (Daniels 1992, 6). Finally, in their awareness of performing a charitable act, it allows the land owner to receive the intrinsic benefits of giving, as well as demonstrating their commitment to environmental awareness and land stewardship (Beatley 1994, 265-269).

A survey of land trust administrators was used to explore the reasons land donors gave land and/or contributed conservation easements to a land trust. After consideration of the issues of logistics and donor confidentiality, it was decided that the administrators of selected land trusts would be selected as the survey respondents. A selected number of administrators drawn from the *National Directory of Conservation Land Trusts* (Bacher 1991) became the population. The mail questionnaire was the research instrument and was approved by the Iowa State University Human Subjects Review Committee (Appendix III, Human Subject Review Committee Application). Chapter III, Development of the Research Survey Instrument, describes the survey process.
Diminishing Resources

President Thomas Jefferson viewed the country as possessed of land and resources sufficient until the thousandth generation. The business of the nation in the 19th century was the exploitation of the vast public domain. One scholar observed: “The United States are primarily a commercial society, and only secondly a nation” (Brenneman and Bates 1984, xi). A century later President Woodrow Wilson reflected on Jefferson’s words, and lamented on the wasteful way in which wealth had been wrested from the wilderness. Brenneman and Bates (1984), both noted land conservation attorneys, stated that the roots of the American land conservation movement lie in that wasteful experience and in the way thoughtful, ethical citizens perceive the consequences of that experience.

Thomas L. Daniels, Ph.D., the Executive Director of Lancaster County Agricultural Preserve Board in Pennsylvania, believes while land is considered as property, it is also a special resource with certain attributes and characteristics. He continues that land is a resource that is immobile, and thus can not be moved to where it is needed. It is not a manufactured product nor does it proportionally increase as population increases to meet its demands. Land varies in quality and amount depending on a designated use, and it has the potential to be used for various competing uses. As precious as land is to sustaining our livelihoods, the protection of pristine landscapes and arable lands through land trusts provides a counter balance of protecting renewable benefits versus the consumptive benefits of unplanned housing, businesses, and industries (Daniels 1995).

Consumption of land continues as existing urban settlements expand, and as new ones emerge as well. Metropolitan areas as defined by the U.S. Census Bureau, (1980) presently encompass 16 percent of the land area in the United States. This includes 29 percent of all farms and almost 20 percent of harvested cropland. Heimlich (1989) observed how metropolitan areas now encompass substantial portions of the United State's agricultural lands. Heimlich examined the pressures metropolitan agricultural lands are under from urban growth influences. In a study of agricultural lands pressured by metropolitan areas, Heimlich found an increase from the 444 counties in the former standard metropolitan statistical areas (SMSAs)
designated before 1971 to a total of 711 counties in the metropolitan statistical areas (MSAs) by 1985 (Heimlich 1989, 457-459).

Also, as the fiscal resources of local, state, and federal governments are becoming increasingly unavailable, many lands of historic or natural value are becoming part of the pool of land available for commercial, residential, and industrial development (Hocker 1982, 226-228 and Exchange 1995). Simultaneously, as these public land acquisition funds become less and less available, nonprofit conservation organizations such as land trusts play the vital role of planning and protecting special landscapes (Hocker 1995, 21). Too many haphazard developments and public service facilities have signaled a warning to people that something detrimental is happening to their land (Daniels; 1995). In reaction, people seek to revive their understanding of the relationship between themselves and their environment (Hocker 1995, 18).

**Land Protection Awareness: Past and Present**

The public's awareness to protect special lands has been occurring in the United States for more than one hundred years. However, the movement that led the way for the protection of open space lands near expanding urban areas was created by the landscape architect Charles Eliot. Eliot and his followers observed that as the cities grew rapidly, there was less demand for more open space. Nevertheless, Eliot believed it was necessary for urban people to have access to the countryside (Abbott 1993, 5-10).

On May 21, 1891, the Commonwealth of Massachusetts approved a bill known as Chapter 352 of the Acts of 1891. The act created a corporation “...for the purpose of acquiring, holding, maintaining, and opening to the public, under suitable regulations, beautiful and historic places and tracts of land within [the] Commonwealth...” (Abbot 1993, 11). Eliot envisioned a board of trustees having the “...power to hold lands free of taxes in any part of the Commonwealth for use and enjoyment of the public” (Abbot 1993, 11). With Eliot at the forefront, this act made it possible for The Trustees of Reservations to exist. The statement of reasons of The Trustees of Reservations contains Eliot’s thoughts: “It is everywhere agreed that it is important to the education, health, and happiness of crowded populations...
that they should not be deprived opportunities of beholding beautiful natural scenery” (Abbott 1982, 151). It was this act that made it possible for future land protection organizations to be rightfully recognized.

Whyte’s seminal paper, *Securing Open Space for Urban America: Conservation Easements* (1959), proposed conservation easements as a means to secure open space, had as its precedent the Act of 1893 that authorized the Boston Metropolitan Park Commission to acquire rights in securing open space lands (Whyte 1959, 11). Whyte proposed a number of land acquisition and land control alternatives for the protection of special lands. As for the land trust, Whyte suggested the trust should purchase or receive a donation from a land owner whereby one or more of the owner’s rights specific to a piece of property would serve the needs of the public without the agency or land trust having to purchase the complete set of rights. The legislatures of California and Massachusetts have since led the way to set a statutory basis for purchasing easements for the purpose of securing open space lands. Whyte went on to suggest the *easement device* would increase the potential for more land giving—an influence to motivate land owners to think of protecting *special landscapes* for the public’s benefit (Whyte 1959, 11).

Since the creation of The Trustees of Reservations and Whyte’s paper on conservation easements, protecting land through a land trust has become an increasingly popular land protection mechanism and philanthropic activity in America. The Land Trust Alliance, formerly known as the Land Trust Exchange, (Bacher, 1991) was created in 1982 as the national organization to represent local and regional land trusts. Its mission was to strengthen the land trusts’ movement by assisting them in their mission for saving and protecting lands through a variety of stewardship, legislative policy making, and educational programs. The increased losses of agricultural and open space lands, the pressures of land development, and legislative tax reforms have focused the public’s awareness on environmental issues so as to create a desire to protect land (Bremer 1984, 17-23).

As shown in Figure 1.1, land owners that have elected to protect land through donation have caused the number of land trusts to increase from 400 in 1980 to just over 1,000 in 1990. And again from 1990 to 1994, the number of land trusts in the Land Trust Alliance rose dramatically from 889 to 1,095, a 23% increase. During the 1990 to 1994 period, the amount
of land that land trusts helped to protect grew from 2.7 million acres to over 4 million acres (not including land conserved by national land trusts) (Hocker 1995, 18). It would appear the nation's population has begun to place an ever increasing higher priority on how the natural environment plays an inescapable role for influencing the increasing number of acres being protected by land trusts (Land Trust Alliance 1995, 8).

These reports verify that presently, land trusts represent one of the fastest growing segments of the conservation movement. Hocker (1995), believes four factors are influencing the growth. First, more people have come to realize that open space is more than an attractive landscape and, therefore, there is an understanding respect for the ecological relationships between themselves and their conduct in their surrounding natural environment. Second, more people have come to understand the broader long-term economical, sociological, and ecological implications to future generations in the wake of agricultural land conversions in metropolitan regions. The third observation includes the fact that more people have become appreciative of the local results they can effectively achieve through working with a land trust, compared to the conventional process of a government conservation program. Finally, more local citizens are aware of the guidance available to them from such a nonprofit conservation organization as the Land Trust Alliance to assist them in forming their local land trust (Hocker 1995, 18).
Finally, other indications for people’s desire to protect and enjoy the natural environment are reflected in the popularity of conservation and environmental organizations such as the Sierra Club, National Audubon Society, and The Nature Conservancy has also increased—an increase which can be attributed to many political and social influences. A survey of the membership of 22 such groups across America showed a membership of 5.7 million in 1980 and 11.5 million by the end of 1991 (Hendee and Pitstick 1992, 6-11). Membership increase in these groups illustrates how society is becoming more aware of its relationship to the land and to their environment. People are beginning to consider land not merely for its productive or commercial value, but for its inherent value as an entity with intrinsic qualities. According to Beatley (1994), these intrinsic qualities extend to such values and ideas as Leopold’s *land as a community ethic*, and Ernest Partridge’s *self-transcending* theory. Partridge claims that an individual needs the type of psychological fulfillment derived through the independent and external experiences—the natural environment—that will flourish beyond their lifetime (Beatley 1994, 105, 119).

**The Land Donor and Land Tenure**

The reasons land owners give land, interests in land—land ownership must be understood. The American Revolution was fought against England and the influences of other land-based European monarchies where land was owned by only a select few. One of the personal benefits resulting from the American Revolution was the right of individuals to own property. By the 19th century, Americans had initiated the land reform idea that established the primacy of individual land ownership without regard to one's lineage (Briles 1995, 17). Within these rights are contained the right to establish a conservation easement.

The owner of the land property has the rights of use, lease, and disposition. A shift in land ownership takes place in “the bundle of rights” concept for land ownership. Within the right of disposition is found the right to sell all of the rights, i.e., the fee simple, the right to sell a portion of the rights, the right to bequeath, the right to mortgage, and the right to establish a trust (Sargent and others 1991, 17, 18).
This exploratory study examines land owners' motivation to donate land to a land trust only through two types of property rights: 1) donating the land fee simple as a complete physical entity and the transferring the possession of all rights that accompany the land property; and 2) using a conservation easement, whereby the land owner designates which partial rights will be transferred as a donation of development rights on their property to another party—in this case the land trust (Sargent and others 1991, 220). The land owner who creates a *conservation easement* or *conservation restriction* on his or her land property, which is a recorded interest in one's property, gives the right to enforce the limitation and interest to a tax-exempt charitable organization (The Commonwealth of Massachusetts, 1992). The land owner who donates an easement to a charitable organization still owns the land (Small 1992, 15). Interestingly, a land owner could not claim a tax deduction for open space and historic preservation until the Historic Structures Tax Act of 1973 was passed (Small 1979, 311).

Awareness of this act and the acknowledgment that one has of a conservation easement, the land owner may elect to protect one's special lands by restricting the type and amount of development to their property to achieve their land stewardship or estate planning objectives. Generally, conservation easements are restrictive, perpetual, and non-appurtenant if there is no public land nearby. A conservation easement stays with the property, or continues to burden it, if transferred to another owner (Wright and Wright 1985, 3-7). In planning to execute a conservation easement, the land owner has the liberty to further identify special features and further specify other relevant aspects of their property being considered for protection and donation. (Diehl and Barrett 1988, 5). Finally, the potential for self-benefiting tax deductibility, and the availability of the conservation easement coupled within the context of uniquely desirable landed property and how to use it for creative land protection purposes is what the researcher sees as an overarching influence for the reason a land owner would be motivated to donate land to a land trust.

**The Land Trust as theDonee**

A land trust is a legal entity that holds title to uniquely valued and special lands. A land trust may be established as nonprofit corporation or as a trust under state law. However, the
land trust generally achieves much more success if it is established as a private nonprofit organization (corporation) through Section 501(c)(3) of the Internal Revenue Service Code (1954) (Edie 1987, 47). This legislation recognizes the land trust, the nonprofit organization, as a legal entity enabling it to transact lands for the purpose of open space, recreation, and resource protection, as well as granting it tax exempt status (Bremer 1984, 17).

Land trusts are considered nonprofit educational and charitable entities imbued with a mission set forth in a set of by-laws. Because a land trust is a tax-exempt organization, it may receive gifts of money, property, and/or donations of development rights qualifying as income tax deductions (Daniels 1992, 3). Beneath the land trust’s administrative framework of tax regulations and land-use laws, are the intensely humanistic aspects of altruism reflected in the concern for protecting cultural and natural resources. Because of its legal status, the land trust has the authority to receive both land and funding from private land donors, foundations, members of the community, and, recently, even government programs. Finally, it is the land trust as a charitable nonprofit conservation organization that receives land donations from motivated philanthropic land owners that makes it possible for a land trust to exist.

One should understand that, to complete the land contribution transaction, two key participants become involved in a land giving act—the donor party who gives land, and the donee, the one who receives the land contribution. The land donor is the property owner who wishes to donate the rights of use of the property through a conservation easement or to give the property fee simple to the land trust. Once the land or a conservation easement is donated, the owner achieves financial gain by claiming a tax deduction as a charitable donation against federal taxable income. Additionally, the granting of a conservation easement also reduces the value of the property for federal estate tax purposes. Synergistically, the converging influences of tax deductible benefits and land protection desirability merge within the land owner to motivate one to contribute land. Finally, asking what motivates a land owner to give land will provide further insight to land donor motivational behavior and a new awareness to the land donor-land trust relationship.
Organization of Thesis Chapters

The following summation of each chapter provides for an understanding of the organizational framework for conducting this exploratory research study.

Chapter I overviews the philanthropic forces that surround land donor motivation, the importance of this study, the relationship of the study to land tenure and the land trusts' land saving mission, the events that led to the formation of land trusts, and the land donor as a philanthropist as well as a concerned land steward.

Chapter II surveys the literature that best lends information to the topic of land donor motivation. The theme identification is developed from the literature surveyed on the subjects of philanthropy, social psychology, land-use ethics, and tax and land-use law. An exploratory approach to what motivates a land owner to give land reveals aspects through selected themes of:

1) altruism-egoism;
2) self-benefiting tax deductibility; and
3) land-use ethics.

These themes reveal some of the aspects that may influence the motives of potential land donors and lay the groundwork for a survey questionnaire and an exploratory study.

The research procedures and the selection of the survey respondents used in this exploratory study are described in Chapter III. A questionnaire provided information from 104 land trust administrators through a nationwide survey. Respondents reported their land donors' characteristics and beliefs that motivated them to give land or a conservation easement to the survey respondent—in this case the land trust being represented by the land trust administrator. In some of the replies the respondents gave their opinions of their donors' perceptions, while other responses provided tangible data reported from the land trust's records.

Chapter IV presents an array of descriptive analysis appropriate for the results of the survey. The data are statistically analyzed and reviewed in relation to pertinent aspects
discussed in the literature review. The results probe land donor motives and provide insight to the land donor motivation topic.

Chapter V concludes with a discussion of the significant findings of the data analysis. These findings may help future researchers further understand land donor motivation. Any questions or implications generated through the exploratory process are summarized for future research efforts or strategies.

The final portion of the thesis contains the acknowledgments and appendices. Included in the appendices are the survey instruments and supporting documentation, a research interview journal, and other items relating to the survey results.

**Application and Significance**

Professional land trust administrators need to be aware of potential land donors. Becoming familiar with land owner motivations would allow for early identification of appropriate land donors. Such a profile may be possible through specifically designed land donor segmentation research coupled with the results of this study (Prince and File 1994, 2). This in turn, could lead to more valuable and larger donations, thereby increasing the protection of natural areas for the public good. By integrating more specific land donor motivational information with land trusts’ planned giving and educational programs, land trust administrators may become more successful in attracting future land donors and obtaining special lands for protection in perpetuity.

As land donor motivation identification strategies become acceptable, the resulting information has the potential to:

1) enhance land trusts’ land donation programs;
2) encourage implementing long-range land acquisition planning; and
3) increase the importance of land protection practices as a philanthropic function.

These strategies will perpetuate the land trust as well as benefit communities and private land owners by providing them with new found information and advice concerning the land donation process.
Understanding these land donor motivational influences will make the land trust a more effective land saving nonprofit organization as well as a philanthropic vehicle for those who wish to return something to the community. When the land trust and the land donor act in conjunction with local community, state, and national governments' land-use policies along with a community's well-articulated vision for its cultural and natural resource protection, the effectiveness becomes valuable to the enhancement of the individual's and community's future.

NOTES

1. In a modern social context, the land trust represents a nonprofit entity. Peter Dobkin Hall, a senior research associate with the Program on Nonprofit Organization at Yale University, defines a nonprofit organization as a body of individuals who associate for any, or for all of these three purposes to: 1) perform public tasks that have been delegated to them by the state; 2) perform public tasks for which there is a demand that neither the state nor for-profit organizations are willing to fulfill; and/or 3) influence the direction of policy in the state, the profit sector, or other nonprofit organizations (Hall 1987, 3).

2. Political philosophers such as Aristotle, John Locke and Thomas Paine, the demographer Thomas Malthus, the legal scholar William Blackstone, were theorists whose thoughts on individual rights influenced the way land tenure took root with the founders of the United States (Briles 1995, 17). As this country was forming from a group of colonies, they were determining the rights of individuals.

3. Black's Law Dictionary defines the legal concept of property as “the unrestricted and exclusive right to a thing; the right to dispose of a thing in every legal way, possess it, to use it, and to exclude everyone else from interfering with it” (Sargent and others 1991, 215). Property must have an object and owner and protection by a sovereign state. There are a number of types of property, one of which includes real property referring to land and whatever is erected, growing upon, or otherwise permanently fixed to that
land. Direct and indirect rights apply to the land. Indirect rights refer to the rights of the government which may be used to control the use of the land. Direct rights are those that apply specifically to a parcel of land; such as lease right, or limited use, and equity right meaning the complete right to use or dispose of a property by the owner. (Sargent and others 1991, 216-217).
CHAPTER II

LITERATURE REVIEW

Introduction

Land owners who donate their land or conservation easements have made that decision through the motivating influences of their philanthropic philosophy that has been shaped by their values and beliefs. These values then are reflected through the creation of a land trust that protects the cultural and natural environment. Inquiries to previous research on land giving motives to philanthropic organizations indicate a paucity of information. (Appendix II, Researcher's Interview Journal). Other than research conducted by philanthropic research foundations, or specialized centers at academic institutions, previous research specifically about one's motives for making land donations to land trusts were seemingly minimal. Nevertheless, the subsequent literature reviewed on the topic indicated the motivation for land giving has its roots in philanthropy and the motivation of social psychology. This chapter presents an overview of the literature to establish an initial basis in this exploratory thesis of the factors responsible for motivating a land owner to make land gifts to a land trust.

This literature review begins by discussing two subjects as the principle elements behind the thesis topic: 1) the altruism-egoism component of philanthropy as a reflection of pro-social behavior inherent to the land donor's motivation to give land (Batson, 1991), and 2) land-use ethics as a foundation element to establish the land donor's choice in values which play a role towards influencing the types of decisions one chooses concerning protecting cultural and natural landscapes (Beatley 1994, 19). Also, pertinent to the land donor motivation topic—the influence of the self-benefiting tax deduction a land owner may receive, as well as the personal reward one receives enabling the protection of cultural and natural landscapes in perpetuity. However, within the historical background of philanthropy lies the underpinning of those aspects for uncovering the motivations for a land owner who contributes land or a conservation easement to a land trust (Bremner, 1994).
Components of the Land Donor Motivation Act

The essential participants in a land donation exchange are the land donor and the land trust. Particular philanthropic activities—or exchanges become possible because they are the result of an influence that has motivated someone to make a giving decision. These philanthropic acts are shaped by either ethical or value forming processes preceding that particular exchange. As the donor, with the right of property, the land owner has the right to transfer either fee simple or partial rights of property to a land trust. The land trust (donee) represents the nonprofit conservation organization having the legal authority through Section 501(c)(3) of the Internal Revenue Service Code, to receive the donation of land for purposes of educational and the protection of cultural and natural environments. The donor acting on the rights of property could be considered as acting as a motive of volunteerism (Burlingame, 1993).

A land owner who is motivated to perform a philanthropic act of land giving may be doing it for: self-gain, others’ benefit, or an unselfish commitment to a cause without anything expected in return. Altruism-egoism, tax benefits, land protection, and land-use ethics appear as the primary motivational forces that influence the land owner to contribute land. In many cases, the land gift comes to fruition through a convergence of a number of these motivations in varying degrees of influence for the land owner. In this respect, land trusts literally receive life through their land donors because land trust cannot exist without the gifts of land or interests in land.

Defining Philanthropy

Gaining a preliminary understanding of philanthropy begins by examining the land-giving motive in context of the development of Western civilization. One may argue whether land giving represents a form of philanthropy. For the past 3,500 years of Western civilization, charity and philanthropy have been interwined (Gurin and Van Til 1990, 3). The terms philanthropy and charity tend to be used interchangeably, with one commonality—giving (Bremner 1994, xi-xii). Like love, giving represents an element of both charity and philanthropy, and getting or receiving fundamentally characterizes giving. When one
performs an act of giving to alleviate the need, sorrow, or suffering of others, it is recognized as charity. Charity tends to be recognized as active generosity to the poor and/or the leniency and mercifulness in one’s judgment of others. Acts of charity tend to arise from being associated with the poor and the disadvantaged and, characteristically, charity gives others the benefit of the doubt (Payton 1989, 30). While this term has meaning, Payton contends it is nearing the end of its utility in modern thought, having to give way to the more appropriate term philanthropy. Today, although the use of the term charity is maintained through references in state and federal tax codes, it will most likely be changed (Van Til 1990, 22).

While secular in its origins, by comparison philanthropy emphasizes the love of humankind—rather than the love of God (Bremner 1994, xi-xii). Bremner claims those performing acts of giving to prevent and correct social and environmental problems, and to improve life and living conditions for people and creatures one does not know and that have no claim on those performing the act of giving tends to be recognized as philanthropy (Bremner 1994, xi). On the other hand, Boulding refers to philanthropy as, “...the voluntary, one-way transfer of exchangeables...,” viewing it as having to do primarily with giving money (Payton 1989, 30). Payton (1989) defines philanthropy as the thinking and feeling about one’s values and how they influence one’s actions. One’s personal social perspectives form the way he or she would like the world to be. Standards of performance and the so-called instrumental values, begin to express one’s abilities and our sense of morality. Payton further believes philanthropy expresses an essential value as “...having or showing interest in or being concerned with the welfare of others” (Payton 1989, 30). Payton states, philanthropy primarily benefits others and is characterized by its inclusiveness of voluntary association, giving, and service (Gurin and Van Til 1990, 3). Finally, Payton suggests if value is a preference, then the philanthropic act will always tend toward the altruistic end of a scale of preference and away from the egoistic (Payton 1989, 30).

Van Til (1990) concludes that philanthropy viewed in its contemporary setting may be identified as: the voluntary giving and receiving of time and money, directed toward the needs of charity and interests of all in a better quality of life (Van Til 1990, 33-34). However, as a more specific contemporary definition, philanthropy has come to broadly recognize improving
the quality of life for all community members by promoting their welfare, happiness, and culture. According to Guring and Van Til, in this context, philanthropy focuses on such interests and concerns of all income classes for environmental protection, historic landmark preservation, disease prevention, educational improvement, and art enhancement (Gurin and Van Til 1990, 4). Thus, philanthropy has evolved over the centuries to where it now encompasses the land owner's choice to give land to a land trust for in perpetuity—not just exclusively members of the humankind caring for the causes and/or the other members of humankind. I may be suggested this definition may appeal to present-day land trust professionals and their donors as how they perceive their roles as members of a modern philanthropic community. Overall, Hands (1967) states: "Philanthropic activity can never be understood (or defined) except against the background of the social ethos of the age to which it belongs" (Hands 1967, 7).

**Philanthropic Motives—a Historical Context**

**Ancient views and events**

**Caesar's estate** Classical writers helped shape personal beliefs for how a person should conduct oneself in making contributions to one another and to their community through chronicling the earliest known forms of philanthropy, particularly that of land gifts to the public. Bremner (1994) offers evidence from a number of ancient writers proclaiming how individuals should conduct themselves in contributing gifts to others (Bremner 1994, 3,6). As what appears as an ancient example of a private land owner contributing lands to the public, Bremner offers Plutarch's account of Julius Caesar's estate (100-44 B.C.) In addition to his bequeathment of large sums of money to all Roman citizens, Marc Antony tells the crowd in the funeral oration for Caesar:

"[H]e hath left you all his walks, his private arbors and new-planted orchards on this side Tiber; he hath left them to you and to your heirs forever; common pleasure, to walk abroad in and recreate yourselves" (Bremner 1994, 8).

Caesar's disbursement of his land holdings may be the first ancient record of what appears to be private land being donated for the use and enjoyment by the public. Today, this land-
giving act of Caesar’s would be considered akin to one contributing a private land donation to
a land trust or donating property to a public park system for future generations to enjoy. It
remains unknown what motivated Caesar to make these donations. What appears conclusive
is that a record remains which strongly suggests how the eminence of a powerful and wealthy
individual’s land donation had as its purpose to remain for the enjoyment of the public and
generations to follow.

**Religious origins**  As Western civilization developed, so did religions’ ideologies with
their followers along structured paths of benevolence and charity towards others. Followers of
Judaism, Christianity, and Islam each had philanthropic meanings closely tied to their religious
obligations (Payton 1989, 31). With the rise of Catholicism in the Middle Ages in Europe, the
church claimed its preferred share of monetary and human resources from the charitable
contributions it received, and then applied them to its own political purposes. With the
Reformation in the 16th Century, the rise of the secular state, and the growing social
dislocation caused by the Mercantile Age, the home of charity gradually shifted from the
church to the purview of government (Gurin and Van Til 1990, 5). These reforms within the
church, as well as other activities with a more questionable intent, created the events causing
England’s parliament to establish a law that would create, control, and protect funds to be used
for charitable purposes. By the 17th Century, the Statute of Charitable Uses of 1601 was
passed, known as the Elizabethan “Poor Laws” (Gurin and Van Til 1990, 6). The passage of this
law marked a milestone in an effort to establish charitable reforms in society. With the reforms
in place, a gradual transition took place from the *church only* control of charitable causes, to the
broader humanitarian concerns that secular philanthropy was ready to undertake.
Nevertheless, from a 20th Century historical perspective, it can be stated that religion plays a
role to motivate one to perform or support a charitable or philanthropic act.

**American colonial practices**  Present day philanthropy in the United States owes its
past to England’s Elizabethan “Poor Laws” 1601(Gurin and Van Til 1990, 6). As philanthropy
spread to America, it progressed through modifications to meet the circumstances in the
development of a new nation. McCarthy (1989) argues the philanthropic spirit that was passed
on to our country’s earliest philanthropists by their forbears had the characteristics of being
very intuitive and highly personal. Voluntarism stood out as the distinctive characteristic that made philanthropy different in America from that in England. This distinguishing characteristic made it possible for the communities to exist before the governments were in place to provide public needs. This resulted in voluntary collaborative activities to provide basic social services (Gurin and Van Til 1990, 6). In 1630, Winthrop's leadership in the early American colonial settlements saw the emergence of volunteerism as an inherent characteristic of the first settlers. Those motivated through their intuitive and personal acts of volunteerism advanced humanitarian and benevolent causes as well as instilled the philanthropic principles for the American colonial communities and their citizens. The act of giving was intrinsically of equal or greater significance than the gift itself. McCarthy concluded that the gift became a means for reaffirming public faith which resulted in the social interweaving of wealth and virtue, individual prosperity, and community stability (McCarthy 1989, 47).

Similarly, the grass-roots initiative of land owners donating their property to a land trust resounds with the volunteering spirit of the early colonists. Whatever the reason or influences, private land owners and local collective citizenry continue to act to protect landscapes so others may benefit without the need of government involvement. These activities suggest another motivational behavior of land donors. Some land donors' motivation for land giving may be influenced by the desire to share their unique landscape with members of their community. However, it is important to realize that the land owner may be motivated to make the land gift to a land trust primarily for the tax deductible benefit or to protect it from other unwanted uses. Nevertheless, according to Diehl and Barrett (1988), the donor of a land conservation gift must meet the requirement that the property be of benefit and be accessible to the public as well as meet Treasury Regulation 170(h) and 1.170 A-14 (Appendix IV, Taxation, Note 1) (Diehl and Barrett 1988, 240-241 and 242-256). In the process of preparing to make a land donation, these requirements may cause a land owner's motive to give land, to be influenced, in part, to the extent one believes their land gift will benefit the community.

**Modern views and practices**

*Kant* By the late 18th century, Kant's *categorical imperative* advanced the belief that the individual is capable of acting in good fashion to achieve a moral action (Griffith 1984, 21-22).
It may be possible to argue that those individuals who practice philanthropy do so out of a desire to act in good fashion. In such instances, the donor desires to become an active agent to achieve a moral action (Griffith 1984, 21).

Kant believes an individual acts out of moral principle which he identifies as the *categorical imperative*. To the individual, the act of giving has a higher priority than the self-benefit gained from the contribution. Kant recognizes will and feeling, in addition to objects of cognition and thought. In *Critique of Practical Reason* (1788), Kant argues that the will of a rational being exists autonomously as a law unto itself. Because the will is usually free, rational beings have within themselves an unconditional self-imposed moral law or duty—the *categorical imperative*. The *Kantian act* places the donor in the position of caring more about the act of giving than the result or the price (Griffith 1984, 21-22). Nevertheless, as the 19th century came to a close, and it did appear Kant's views had an affect on society. In turn, philanthropy came to mean contributions of money to a variety of causes intended to benefit all classes of society (Bremner 1994, xii).

Conclusively, Kant's theory has come to be a fundamental principle in modern philosophy and forms a basis of reason for what motivates an individual to give. If so, then subsequently, land owners acting of free will to donate land to a land trust, may indeed be motivated by the actual act of "giving the land" than the self-benefit obtained from other influences.

**Delavan** Bremner (1988) calls attention to Delavan, a founding member of the temperance movement. During Delavan's period, if times were good and there were surpluses, those individuals inclined to give to charity did so, and ceased whenever they thought it was prudent or appropriate. Edward Delavan contributed in time and money to the public community which may have influenced why he choose to bequeath his wealth to only two recipients: 1) civic causes (as deemed worthy according to Delavan's ideological values); and 2) value attributed fairly to the surviving members of the Delavan family and thus able to benefit from his wealth (Bremner 1988, 55). Delavan's attitude toward giving was typical of this period. Nevertheless, the decision to give or not to give based on wealth surplus may seem indicative of an attitude or possibly an attribute affecting a land owner's motivation for
deciding to donate land to a land trust. These influencing reasons give rise to the possibility that in trying to identify one's motives for land giving, necessitates accounting for the intergenerational transfer of land property for its appropriate future use.

Carnegie and Rockefeller  From 1885 through 1915, modern American philanthropy started to take form. Andrew Carnegie and John D. Rockefeller both professed that it would be better for one not to sell everything he or she owned and give it all to the poor. Such an act would deprive the donors of their responsibility to decide the purpose in their wealth disbursement (Bremner 1994, 159). Rockefeller's religious convictions and the old-fashioned concept of stewardship became his motivation for performing philanthropic acts. Andrew Carnegie shunned any religious motivation classifying himself as a scientific humanist.

Carnegie's motivation for giving may have come from his close friend, Herbert Spencer, who inspired Carnegie with concepts of Social Darwinism (Harr and Johnson 1988, 23-24). Generally speaking, Rockefeller and Carnegie favored giving—or in Rockefeller's preferred term, "...investing in—education, research, and cultural institutions" (Bremner 1994, 159). During the later portion of the 19th century and beginning the 20th century, the philanthropic views of Carnegie and Rockefeller changed the way gift giving was approached by wealthy individuals. Carnegie's and Rockefeller's examples led to a systematic manner in which the very wealthy wisely approached the selection of their recipients to insure proper use of one's wealth occurred during the donor's lifetime.

Harr and Johnson's The Rockefeller Century indicates one's motivation to give occurs because a life devoted to giving results in one being more satisfied over time, than if one were to choose to be desirous of fame and power (Harr and Johnson 1988, 10). This motivation to give may be due to what Harr and Johnson observed as being the family's strong religious principles coupled with their classical sense of civic duty. Similarly, this family tradition has associated with it the pressures of training and preconditioning in one's youth to accept the family's legacy of influential philanthropic wealth. Regardless of Harr and Johnson's observations of Rockefellers' philanthropic values Harr and Johnson contend philanthropists' motivations were most likely driven by gratification of ego, expiation of guilt, quest of power, and desire for popularity (Harr and Johnson 1988, 9).
The Rockefeller tradition for planning and executing a mission of philanthropy created the epitome for serving as a model of private family philanthropy. The Rockefeller's meticulous planning and thorough implementation deserves recognition for the philanthropic principles it has created for other donation-minded persons to follow (Harr and Johnson 1988, 10). This strong family tradition of philanthropic giving and estate planning has been mirrored by many individuals with similar motivational characteristics and the desire to plan their estates. Subsequently, the Rockefeller family model becomes a motivating influence in a land owner's decision to give land to a land trust.

Ethical land-use influences The land-use ethic is a new dimension influencing one's decision to give land. Humankind's relationship with the environment and natural surroundings began to emerge in the United States, beginning in the late 1960's and early 1970's. However, it was not until the 1980's, that a concern for the environment started to take hold in the American consciousness. A moral attitude toward the environment was being realized through the implementation of land stewardship and conservancy programs, wildlife interest groups, and the creation of new environmental professionals (Hendee and Pitstick 1992, 6-10).

Beatley perceives the land-use ethic is critical to a land owner's decision-making process—a process motivated by both facts and values (Beatley 1994, 19). Land donors, whether they are consciously aware of it or not, may practice an ethic that involves making and defending moral choices. The land-use ethic value contributes toward the motivational influence for one to give land. Individuals, or societies, who practice an ethic generally have the capacity to examine their current values and attitudes as well as their consistency and their defensibility. According to Beatley, ethics becomes the process by which values are applied to decision-making (Beatley 1994, 19).

Land Donor Motivation Aspects

The historical context of philanthropic motives acts to identify the essential themes contained in the motives for giving land. This context embraces the classical views, religious origins, early and present day American philanthropic ideologies, and, until recently, the
inclusion of land-use ethics as indicators of factors that motivate a land owner to give land to a land trust. A number of motivating influences have been identified through the historical context of philanthropic motivation displaying humankind's concern for others less fortunate and for worthy causes of public benefit. On the one hand; power, popularity and personal ideology appear to be associated with self-benefiting motivational behavior, while on the other hand guilt and ethical morality reflect one's motivational behavior for an other's benefit and welfare (Harr and Johnson 1988, 9,10).

From the literature reviewed thus far, possible land giving motives appear to aggregate in the form of donor's expression of altruistic or egoistic behavior. Universally, the approach in examining the motives of altruism and egoism has been as it affects one's giving to others, not a human caring about an inanimate object such as land and the concern to protect the cultural and natural environment. To explore what motives a land owner to give land to a land trust, it appears that, besides the inquiry into the human behavior of altruism and egoism, it becomes implicit that consideration be given to the influences of land protection desirability, self-benefiting tax deductibility, and land-use ethics.

Observing these aspects necessitates further inquiry as to what motivates a land owner to give land to a land trust. These aspects suggest the development of themes that begin to frame the underlying influences for identifying motives land owner giving. In the exploratory spirit of the present research, it appears that three subjects bear significance to factors that motivate a land owner to give to a land trust. Therefore, in this portion of the literature review three themes of aspect/influence will be discussed from the perspective of land donor motivation as an act of:

1) altruism-egoism motivational behavior;
2) self-benefiting tax deductibility; and
3) land-use ethics.
Land Donor Motivation as an Act of Altruism-Egoism

Altruism

Understanding land donor motivation involves understanding an aspect of human behavior known as altruism, often considered a prosocial behavior and a component of moral philosophy. Initially, altruism means any and all behavior intended to benefit others in any way. Not until the last 25 years has there been formal inquiry into the development of prosocial behavior. This meant that until the early 1970's much of the scholarly community, shared the belief of human nature as being egoistically oriented, which resulted in ignoring the prosocial behavior topics of helping and caring—that is, inquiries into altruism (Burlingame 1993, 4).

Hunt believes altruism lies at the heart of modern philanthropy (Hunt 1990, 16). Altruism allows part of one's human behavior the possibility to give so others may benefit. It plays the role responsible for giving while being offset by its counterpart—egoism. On occasion, people may act outrageously against one another; on the other hand, people may routinely and spontaneously care and offer benevolent acts to others. A person's emotional and physical makeup requires him or her to live in contact with people and thus humankind could not survive if basically cruel and selfish actions towards one another were allowed to take place. Therefore, altruism becomes necessary for survival, and is essentially what motivates a philanthropic act (Hunt 1990, 16).

Psychologists Macaulay and Berkowitz define altruism as: “Behavior carried out to benefit another without anticipation of rewards from external sources” (Hunt 1990, 18). There are a number of prosocial behaviors reflecting beneficial examples of helping others that do not meet the definition of altruism. For instance, being a wealthy individual whose donations provide a substantial tax saving begins to illustrate a situation that approximates prosocial behavior. Such an event usually exhibits mixed motives, including humanitarian sensitivity in contrast to the benefit of tax deductible opportunism (Hunt 1990, 18-19).

The French sociologist, Émile Durkeheim (1858-1917) hypothesized that no society could exist in which people did not continually make self-sacrifices for each other. Helping others
without any expectation of personal benefit, and possibly at some risk to oneself, binds individuals together to form a society. While his hypothesis claims altruism is essential to human survival, however, it does not address how the altruistic behavior can arise in conflict with the desire for self-preservation (Hunt 1990, 16). Batson claims the results as being kind and caring, or either the avoidance of self-censure, guilt, and embarrassment along with material rewards and public praise as acts ultimately motivated by some form of self-benefit (Batson 1991, 2).

Egoism

As altruism is one portion of human behavior expressed as the motivational state of giving—so is egoism. Such thinkers as Aristotle, Saint Thomas Aquinas, Thomas Hobbes, Jeremy Bentham, Nietzsche, and Sigmund Freud asserted the long established concept of universal egoism being directed toward the ultimate goal of becoming exclusively self-benefiting and self-interested no matter what one does or how noble and beneficial it may be to others (Batson 1991, 2). Burlingame remarks that Machiavelli, Hobbes, and Freud maintain human nature is selfish, individualistic, and aggressive. From this perspective, any good that comes of human activity has been obtained because these basic instincts are held in check by the strength of social instinct and society's expectations—reprisal against anyone who transgresses societal rules (Burlingame 1993, 2). Comte realized both egoism and altruism were motivational states within the individual with the crucial difference being the goal of the motivation. Batson goes on to state egoism can be considered a motivational state with the ultimate goal of increasing one's own welfare (Batson 1991, 7). While altruism plays a component with moral philosophy, one's capability to behave altruistically represents an act that explicitly or implicitly contradicts that one's motives are assumed to be grounded in universal egoism (Batson 1991, 3).

Comte's altruism concept

Batson addresses altruism asking: "Why do people do what they do for one another" (Batson 1991, vii)? He argues his definition from the perspective of social psychology. Batson defines altruism by examining the works of French mathematician and philosopher Auguste
Comte (1798-1857), whose writings supported social betterment. Comte coined the term altruism over 150 years ago, during the social reform that immediately followed the French Revolution (Batson 1991, 5-6). Comte’s thoughts on “science of society,” supported by the accompanying collaboration of Saint-Simon, an engineer, believed he could guide the world on a path of social progress (Friedmann 1987, 12). Prior to the term altruism, the question of why help others was discussed within the categories of benevolence, charity, compassion, and friendship. Comte distinguished between altruism and egoism—each as forms of human motivation (Batson 1991, 5). Finally, Comte noted that self-serving social behavior based on the impulse to seek self-benefit and self-gratification would be called egoism. In addition, social behavior based on the expression of an unselfish desire to live for others and the motivation to benefit others Comte called altruism (Batson 1991, 5).

Subsequently, Batson (1991) proposed an alternative definition to Comte’s altruism-egoism human motivation concept. Batson suggested viewing human motivation in two forms: an altruistic form and an egoistic form. Batson also suggested that altruism be defined through human motivation proposing: “...altruism is a motivational state with the ultimate goal of increasing another’s welfare (Batson 1991, 6).” This modern perspective of motives as goal-directed forces for a motivational state lends a broader perspective to what motivates a land donor to give land to a land trust.

Altruism-egoism interface

Hume, Smith, Hobbes, and Dewey One’s being capable of altruism does not necessarily infer one can discern what is a moral act. Scottish philosopher David Hume (1740-1896), observed that one cannot reason from an is to an ought, from an understanding of what our human potential is to what we ought to be (Batson 1991, 4). Adam Smith (1759-1853) views the motivation act in another way believing, “...there are principles in our nature that interest us in the welfare of others, and not just when their welfare affects ours” (Batson 1991, 3). Thomas Hobbes (1588-1679), an English philosopher, claimed the primary law of nature to be self-preservation and theorized two sets of motives: self-love (egoism) and benevolence (charity). Both are present in man’s natural state (Burlingame 1993, 2). Finally, John Dewey
(1859-1952), an American philosopher and educator, developed a definition of altruism to build on Hobbes' theory to further claim:

The primary or natural impulses of man, just because they are natural, are neither egoistic or altruistic, although some of them tend more to individual results and others to acts serviceable to others. Either tendency may be unduly cultivated, but normal moral growth consists in organizing the natural impulses so that the individual finds his chief interest in acts that at the same time are socially useful. The moral problem of education is thus not one of balancing or comprising two sets of motives, but of developing that of ego or self which finds happiness in the kind acts that are of social value (Dewey 1978, 368-369).

Margolis (1982) states that both altruism and egoism are considerations for determining social choice and are intertwined into one human behavioral unit. He defines this condition as his concept of "NSNX" (neither selfish nor exploited) (Burlingame 1993, 3). It would appear that while Batson contends there are two separate forms of human behavior for the motivation of giving—altruism and egoism, previous philosophers, including Margolis offer another insight that strongly suggests altruism and egoism come together for the human behavior to be able to be motivated to give. Gamwell (Burlingame 1993) calls attention to be aware of the term self-interest associated with egoism. To do so means one must clarify how large the self is or how large one conceives the self to be. He goes on to state one's self-interest could include the interest of others, and therefore causing one to define an act as altruistic at the same time that another defines the same act as egoistic.

Volunteerism  Similar to the middle ground views of altruism-egoism put forth by Dewey, Hume, Smith, and Hobbs are Clary's and Snyder's studies of volunteer behavior developed through a model for examining volunteers' motivations. Having applied psychological phenomena in the model, the results of their work provides an understanding of volunteers' motivations. The model identifies the following functions for what motivated volunteers:

1) value-expressive—to show regard for others, to act altruistically;
2) ego-defensive—to reduce guilt and thus make one feel good;
3) instrumental—to gain skills or information for a career purpose;
4) knowledge—to learn more about something; and
5) socially adjustive—to be a part of a group.

An introspection of the volunteerism model strongly indicates that a combination of the motives of both egoism and altruism are present when one volunteers—an act not unlike philanthropy (Burlingame 1993, 5). It would appear the model's results may also provide guidance for developing an inquiry into what motivates a land owner to give land to a land trust.

A donor personality segmentation model for motivation

Prince and File (1994) developed a model for identifying affluent individual donors. They categorized the concerns, interests, needs, and motivations of this select group of donors into seven motivational types (Prince and File 1994, xi). From this categorization process they identified four life domains as the most important areas in areas in a donor's life affecting their decision to make a gift: 1) family history; 2) financial orientation; 3) fundamental beliefs; and 4) friends and associates (Prince and File 1994, xi).

To determine which one of the four life domains in which a donor's giving personality profile belongs, one's background, interests, and motivations are assessed. For example, in the life domain of family history may include a tradition of giving which identifies the dynast type of donor. Similarly, in the life domain of fundamental beliefs, the potential donor may have a high belief in self-fulfillment, indicating they would most likely be considered as an altruist type of donor (Prince and File 1994, 129-134) (Appendix V, Positive Images by Philanthropic Personality).

Prince, File, and Gillespie's 1993 research shows the next step in the process is to place the perspective donor in one of seven donor segments based on benefits, needs, and motivations that the donor believes most important (Prince and File 1994, 9). Each segment represents a particular manner in which a donor group approaches philanthropy. It also indicates a donor's typical attitudes, beliefs, considerations, evaluation process, and how they would be involved with nonprofit organizations. As shown in Figure 2.1 their research also provided these seven donor segments with the relative proportions of each donor segment type and a corresponding
### Segment Types

<table>
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<tr>
<th>Segment Types</th>
<th>Percent of Donors</th>
<th>“Doing Good” Represents...</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Communitarians</td>
<td>26</td>
<td>Makes sense</td>
</tr>
<tr>
<td>2. Devout</td>
<td>21</td>
<td>Is God’s will;</td>
</tr>
<tr>
<td>3. Investor</td>
<td>11</td>
<td>Is good business</td>
</tr>
<tr>
<td>4. Socialite</td>
<td>1</td>
<td>Is fun;</td>
</tr>
<tr>
<td>5. Altruist</td>
<td>9</td>
<td>Feels right</td>
</tr>
<tr>
<td>6. Repayer</td>
<td>10</td>
<td>Good in return</td>
</tr>
<tr>
<td>7. Dynast</td>
<td>8</td>
<td>Family tradition</td>
</tr>
</tbody>
</table>

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**Figure 2.1 The seven faces of philanthropy segmentation**
(Prince and File 1994, 14-16)
summary descriptor for what *doing good* meant to a particular donor in each segment (Figure 2.1) (Prince and File 1994, 13-16).

The Prince and File donor personality segmentation model may tend to suggest similar motivations and donor types exist among potential land donors (Prince and File 1994, 14). Furthermore, their segmentation model may provide a different perspective to further understand the types of personalities that tend to contribute land gifts. The seven personality categories—*seven faces of philanthropy*—characteristics appear to be indicative of motivating factors of a land owner's contemplation process leading to a decision to donate land to a land trust. In a search to determine what motivates a land owner to give land, altruism was found to closely represent the prosocial behavioral act solely for the purpose of helping others or benefiting a cause (Burlingame 1993, 4). A review of the altruism-egoism condition prompts one's curiosity to understand the altruistic influences of donors that were uncovered Prince, File, and Gillespie (Prince and File 1994, 9).

Prince, File, Gillespie's research highlights the essential findings on *the altruists*, and their counterpart *the communitarians*. They reported the altruistic personality embodies the popular perception of the selfless donor who, *wishes to remain anonymous*. The study found only 9% of all major individual wealthy donors in the survey fit this description, while communitarianans, the largest donor segment, represent 26.3% of all donors in this study (Prince and File 1994, 14-17). The study also indicated altruists tend to be college educated (90.3%) and business owners (69.9%). Altruists generally believe the act of giving should be done without determining how it will benefit them, and have a negative view of donors who view their philanthropic acts as a social exchange, which is what the communitarian or investor types would tend to expect (Prince and File 1994, 69,70). Essentially, altruists resents being mistaken for other philanthropic personalities, and decline the typical rewards generally associated with nonprofits—community honors, publicity, and status (Prince and File 1994, 74-80). Prince, File, and Gillespie's study concludes altruists give for these reasons:

1. Provides a process to grow spiritually;
2. Imperative on one's moral conviction;
3. Believes it the only true form of philanthropy; and
4. Giving to a nonprofit becomes generally more superior to government for...dealing with the needs of society (Prince and File 1994, 70-73).

Land Donor Motivation as an Act of Self-Benefiting Tax Deductibility

Tax regulatory legislation: incentive or disincentive

Overview Brenneman believes the tax code influences the land owner to decide whether or not to give land to a land trust (Brenneman 1967, 65). Regulatory tax codes allowing land owners’ a self-benefiting tax deductibility play a key role as they consider donating land to a land trust. However, what motivates one to elect to receive a tax deduction for a land donation may not necessarily be the primary reason the land owner chooses what may be either a fiscally or philanthropically driven decision. Depending on the circumstances surrounding a potential land donor’s estate-planning agenda, tax regulations allowing deductions may be viewed either as an incentive or a disincentive for a land owner to investigate other tax deductible options.

A number of tax revenue acts throughout the years have defined and regulated the fiscal operations of nonprofit organizations, including those of land trusts. These regulations in turn have either a positive or negative influence towards motivating a land donor to give land. The 1969 Congressional definition of nonprofit organizations, also addresses land trusts and clarifies the nonprofit organization’s authority and responsibilities through Section 501(c)(3) (Edie 1987, 47-54). However for the donor, the Historic Structures Tax Act of 1973 made possible open space and historic preservation allowable tax deductible donations for an individual (Small 1979, 311). Subsequently, if a land donor expects to receive a tax deduction, Section 170 sets minimum standards for the land donor’s subject property’s landscape quality, public use accessibility, and intended appropriate use (Brenneman 1967, 68-70; Small 1992, 18-19, and Diehl and Barrett 1988, 240-244) (Appendix IV, Taxation, Note 1).

Aware of the tax regulatory environment affecting land donors, Odendahl (1987) states a number of charitable tax alternatives stiffen the competition for private foundations (i.e., in this case the private land trusts) to exist or for existing ones to rely on regular donor sources (Odendahl 1987, 15). Pragmatically viewed, a potential land donor may be considering other
tax deductible options such as donation of cash, stocks, or priceless collectibles to another nonprofit recipient expressing interest in the land owner’s taxable reductions as well as their estate’s future contributions’ agenda. However, when deciding philanthropic or estate-planning disbursements, the potential donor may be motivated to consider a number of tax deduction variables in conjunction with a land gift fee simple or a conservation easement donation. It would appear the knowledgeable and motivated donor would be capable of appropriate donee selection regardless of the tax deductible benefit opportunities or degree of community commitment. These competing tax deductible opportunities would apparently hold true for the land owner as well. Subsequently, what motivates the land owners to give land may be reflected through the land owner’s selection of donees being either a land trust, a similar nonprofit conservation organization, or another charitable organization of a not too dissimilar mission for cultural and natural resource protection, conservation, and beneficial public good. Nevertheless, a land trust anticipating land or other forms of tax deductible donations needs to be sensitive of potential donors’ preferred recipient associations within their larger philanthropic community.

Whyte’s observations Whyte (1959) observed as early as in the late 1950s that tax deductibility becomes an incentive to motivate land owners to do what they choose with their land. In discussions with land owners preparing to donate a conservation easement, Whyte (1959) found their examination of the different advantages for designing an easement program or land donation was hardly ever driven by tax loop-holes. Whyte noticed land owners were generally aware of more convenient tax deductible alternatives from which to select. These potential land donors go through this process as they seek to economically justify what compels them toward this philanthropic venture concerning their property and the implications their decision would have for them as well as the public (Whyte 1959, 36). Within Whyte’s scrutinious and thoughtful setting, one would believe these land owners had rigorously examined their utilitarian and intrinsic values towards land prior to executing their philanthropic land donation decisions. One should understand through this process that the land owner believes he or she has become assured of making a wise decision for the future. Overall, this land-giving process has served to increase the land owner’s understanding of the
conservation easement—its usefulness in protecting the donor's land and the tax deductible benefits to be received from the value of the donated rights of development through a conservation easement (Whyte 1959, 36,37).

**Jencks’s research**  Jencks (1987) also observes the indirect ties tax regulation has as an incentive for those who make contributions. Jencks discovered individuals’ philanthropic giving represented a by-product of the economic determinants of giving. Jencks’s research uncovered a lesser known group of motivating influences that he termed *the noneconomic determinants of giving*, and how they affect individual donors’ decisions to make contributions. Jencks identifies these influences/determinants as: age, family structure, gender, ethnicity, religion, education, community ties, community characteristics, and family background (Jencks 1987, 326-328). Many of these influences undoubtedly represent significant motivating influences for a potential land donor. Nevertheless, other lesser known influences such as altruism-egoism motivational behavior, land-use ethics, and land protection desirability underlie what appear to be the fundamental principles for land donor motivation and need to be addressed (Appendix IV, Taxation, Note 2).

**Land Donor Motivation as an Act of Land-use Ethics**

**Definition and context**

Land-use ethics encompasses the following aspects of moral philosophy: obligations, rights and duties, social justice, and virtue. It deals with matters of *ought*, rather than what *is* (Beatley 1994, 13). Beatley suggests using the term *attitudes* to describe what people think about particular things. Attitudes are generally more specific and not as centrally focused to an individual’s set of *beliefs*, although many attitudinal expressions are actually expressions of factual or empirical understanding and could be better described as *beliefs*. Beatley perceives most ethical judgments about the uses of land involve a blending of one's facts and values (Beatley 1994, 19). Beatley’s comments offer the possibility, however intuitive it seems, that what one *knows* and what one *feels* towards land may guide one's decision towards the protection and care of the land.
Classical philosophical writings help people to understand their relationship between themselves and other human beings. This knowledge reveals aspects that are central to understanding one's motivation to give to another human being (Burlingame 1993). It could be stated that since the late 1960s and early 1970s, the environment has been brought to the public's attention through the media, organizations, policies, and writings (Flader and Callicott 1991, ix). By the 1980s the increased number of published works had made it evident that a growing concern existed for the understanding for how humankind values its relationship and its conduct towards the environment, notably under the heading of environmental philosophy (Attfield 1981; Callicott 1989).

On the other hand, not until the early 1970s and more recently, by the late 1980s, it has become evident that serious consideration has been given for how humankind views its relationship to the natural surroundings (Flader and Callicott 1991; Leopold 1949). Noted environmental works by thinkers and champions of the environment such as: George Perkins Marsh's *Man and Nature, or Physical Geography as Modified by Human Action*, 1864, Aldo Leopold's *A Sand County Almanac and Sketches Here and There*, 1949, Rachel Carson's *Silent Spring*, 1962, Stewart Udall's *A Quiet Crisis*, 1963, Barry Commoner's *The Closing Circle*, 1971, Donald Worster's *Nature's Economy: A History of Ecological Ideas*, 1977, and, Edward Abbey's, *Desert Solitaire*, 1988, articulated what human beings have done to denigrate the environment and subsequently how those acts and derelict practices have affected the long-term health, safety, and welfare of humankind. These works preceded those of Wendell Berry's *The Gift of Land*, 1981, J. Baird Callicott's *In Defense of the Land Ethic*, 1989, Roderick F. Nash's *The Rights of Nature: A History of Environmental Ethics*, 1989, and other environmental thinkers that have been ardent contributors examining humankind's ethical relation to the environment (Beatley 1994, 276, 277, 283).

**Ethical land-use decision-making**

It may be stated that land owners who consider ethical influences as a contributing factor in their decision to donate land, may view the act of land giving and that property's land-use beyond such utilitarian perspectives as one's potential tax deductibility, and the status quo for one's self-benefiting philanthropic objectives. Land owners, contemplating such a decision about
their property’s use, may indeed be influenced through values and ethics—hence, a *land-use ethic*. Further investigation into this decision-making process may reveal a land donor acting out an ethic that involves making and defending moral choices as it pertains to a motive for donating land (Beatley 1994, 3-11).

Beatley calls attention to values as being what Rokeach defines as “...an enduring belief that a specific mode of conduct or end-state of existence is personally or socially preferable to an opposite or converse mode of conduct or end state existence” (Beatley 1994, 18). Moreover, one has the ability to identify a number of land-use values. These are the personally held views concerning land and the use of land. For example, one may feel strongly that rivers, wetlands, and wildlife habitat should be preserved for posterity. This position represents a land-use value that may be held by an individual or group of individuals (Tuan 1974, 101-120).

Generally, the practice of an ethic means critically examining the capacity of one's current values and attitudes and their consistency and their defensibility. It could be stated ethics becomes the process by which one’s values are applied to land-use decision making (Beatley 1994, 19). Furthermore, the social allocation of land to different uses is fundamentally related to ethics. One who may be motivated to make a land-use decision should be aware this decision affects the condition and quality of the natural and built environment as well as the basic quality of people's lives. Conclusively, most decisions of land-use represent ethical judgments that may be possibly viewed as right or wrong, with either good or bad outcomes (Beatley 1994, 3-4).

**Leopold's community land ethic**

Aldo Leopold (1887-1947) viewed a community based on an ecological premise central to one's land ethic. In *A Sand County Almanac and Sketches Here and There* (1949), Leopold called for the community to be protecting the ecosystem as a whole. He believed that from the community ecological relationship, certain ethical obligations, and equally as well, an aesthetic premise become integral to land-use decisions (Beatley 1994, 119-120). He believed there were certain obligations derived from the mutual interdependence of individuals. The individuals of the community benefit from the community as a whole, and likewise they have obligations to
Leopold believed an individual as a member of a community likewise has membership and associations of a larger biological community and therefore has obligations to it as well. Leopold stated: "The land ethic simply enlarges the boundaries of the community to include soils, water, plants, and animals, or collectively: the land" (Beatley 1994, 120).

Seeking an equitable balance of respect between humans, wild living things, and the land, Leopold urged humankind to accept an attitude in which they participate as "plain citizens" of the earth, not to play a role as subduers. This view offers substantial implications for land-use policy. Leopold never offered a specific land ethics policy document, however, his writings brought attention to the fact that major disruptions of the ecological community represent an unethical act; and individuals have an ethical obligation to act as "stewards" of the land and not to waste its resources and negate its ecological integrity (Beatley 1994, 120).

Holmes Ralston, III, in reviewing Leopold's *A Sand County Almanac and Sketches Here and There*, offers a systemic value and a need to protect the larger ecological systems and processes that support life. Ralston states:

> When humans awaken to their presence in such a biosphere, finding themselves to be products of this process—whatever they make of their cultures and anthropocentric preferences, their duties to other humans or to individual animals and plants—they owe something to this beauty, integrity and persistence in the biotic community. Ethics is not complete until extended to the land (Beatley 1994, 121).

What may be concluded from Leopold's community land ethic is that a land owner that has an understanding, possesses feeling, or subscribes to a conservation ideology similar to Leopold's has been positively influenced by a land-use ethic. In turn, these aspects, either acting singularly or together, may be a contributing factor for motivating one to give land.

**Aspects of ethical land use that may contribute to land donor motivation**

**Religion** Religious up-bring may represent one of the first and most effective influences many people are exposed to as their initial foundation to form world views. Subsequently, how those views were formed instills people's beliefs regarding themselves, humankind, as well as views toward land with its appropriately accorded cultural and natural aspects. One could claim Judeo-Christian traditions have been thought to be part of the exploitative attitude
toward nature. White states: "...no item in the physical creation had any purpose save to serve man's purpose...especially in its western form. Christianity is the most anthropocentric religion the world has seen" (Beatley 1994, 20). Similarly and ironically, North America's native Indians have traditionally lived a life that demonstrates human beings are not separate from nature, but part of a larger life form entity. The native American Indians had fundamentally different attitudes about use of land and for what purpose it serves. They perceived land as an entity that can be shared in only temporally, and then passed on to future generations' inhabitants including both human and nonhuman species. Therefore, it becomes inevitable religious doctrine and religious upbringing may significantly influence one's land-use views (Beatley 1994, 21).

Upbringing and present-day environmental stimuli Parents, family, church, school, publications, media, and political organizations play as nearly an affective influence on attributing to one's land-use views as what religion's influence is on one's world views. Dawson and others (1977), in their work titled Political Socialization suggested parents influence, to a considerable extent, the political views and social outlook of their offspring; however, the degree of this influence and to what extent it may be exerted varies. It remains evident the basic political and social views demonstrated by parents, in turn, lead to influencing their children's' views about ethical land use. Similarly, the social and economic position holds in society people in society, as well as their form of employment, greatly effects their values and attitudes about land-use (Beatley 1994, 20).

Utilitarianism The utilitarian aspect of ethical land use views land as an economic commodity serving to satisfy a variety of human preferences and optimizing human welfare—simply stated—a means to an end. In this philosophical framework, the appropriate use of land becomes that use which can generate the highest return for society, as determined by the pricing signals of a free market economy. The primary value of land—or its fair market value as used when determining a donation of land for a conservation easement to a land trust—represents the economic value it holds in terms of a monetary value and with the same value attached to consumables such as homes, automobiles, and appliances (Beatley 1994, 33). Economists and policy makers traditionally view the free market economy as the most effective
method to maximize social welfare. However, the market system does not lend itself well when it comes to allocating certain goods and services—particularly when confronted with the issues inherent to land and environmental resources (Beatley 1994, 34).

A demonstration of these values becomes evident in Whyte’s advice to the land owner who anticipates entering into a conservation easement agreement solely for the purpose to protect oneself from rising tax assessments. If the land owner does so, and as the market becomes more favorable for the land owner to cause one to pull out of the agreement, this action reflects the strong influence of one’s preference toward utilitarian values. Whyte advises one who is not fully committed to the conservation easement agreement and its implications to avoid initiating this process (Whyte 1959, 36).

John Stuart Mill, (1806-1873) provides yet another perspective for ethical land-use concerning how it may influence a land owner to give land. In On Liberty (1859), Mill asserted individuals have the freedom to pursue their own personal tastes and interests, and only those pursuits which conflict with the freedom of others should necessitate government involvement. Traditional moral philosophy, as well as environmental ethics, advocates preventing or avoiding harm. Here, moral philosophy acts as the basis for the English common law that protects the property owner from the harmful actions of another property owner. This later became the precedent of American nuisance law (Beatley 1994, 54-56). With subsequent inference, it may be stated the moral philosophical underpinnings of nuisance law extend to the application of the conservation easement as a means to afford protection of one’s property from growth pressures and what the land owner may consider to be a form of nuisance or harm that may come to his/her land due to unwanted change or development.

Psychological well-being and natural surroundings Beatley (1994) claims, while one has become familiar with the biological and ecological roles inherent to a landscape, its psychological and emotional aspects also bare critical importance to a feeling of well-being. In large part, humankind tends to have primarily instrumental relationships with the environment knowing that it provides a desired use and the enjoyment derived from that use. Typically, an individual may recognize the intrinsic or emotional qualities inherent to a landscape; however, rarely will an audience present itself in support of the ethical land-use
relationship that is appreciative of nature and the environment (Beatley 1994, 103,104). It could be stated from Beatley's perspective that one's support of an ethical land-use would encompass the natural environment's contributions to humankind as an influence for one's motivation to give land.

From the perspective of psychological well-being, Beatley (1994) perceives that humans require natural areas and must be exposed to the real natural surroundings that go beyond the capacity of its biological and ecological functions (Beatley 1994, 104). Repeatedly, the central focus of a land-use dispute focuses on the preservation of natural areas. Those that choose to argue from such a position claim these landscapes and natural areas become essential for stimulating the human contemplative faculty (Beatley 1994, 105). Sax contends our national parks fit a role well suited for supporting contemplation and reflection. These lands do offer an exception to humankind's preoccupation with only an instrumental relationship with the landscape, particularly when people sense the need for a natural environmental sanctuary in an increasingly technologically dominated society and landscape (Beatley, 1994, 105). One's attraction to natural landscapes may be attributed to their genuineness to promote wonder, fascination, and fulfillment for the participant. The renowned landscape architect, Frederick Law Olmsted (1822-1903), creator of Central Park, and Charles Eliot (1859-1897), also a landscape architect and founder of The Trustees of Reservations, continuously introduced these reoccurring themes in their works as well as in their writings documented throughout the late 1800's and well into the 20th century (Beatley 1994, 105).

Whyte's observations of land owners about to give land lends a perspective concerning the aspect of one's psychological well-being toward the land. Whyte observed the feelings of land owners prior to making a land donation, noting it demonstrated the influence of one's feeling for their property or how a special landscape becomes integral to their decision to give land or a conservation easement (Whyte 1959, 36). Through these observations, Whyte concluded and strongly suggested the land owner should have already developed a respectful feeling for the land. Similarly, these feelings of attachment or concern for the land should precede the land owner's early preparations for contributing land fee simple or donating rights of development for purposes of land protection and conservation. This aspect of the land
owner appeared to Whyte as being analogous to one whom has an almost pathic quality towards the land's intrinsic value. Whyte further emphasized these qualities should be present in a potential land donor so as to make their participation in this transaction a meaningful and purposeful experience (Whyte 1959, 36). Again, it could be stated this aspect of an almost pathic quality for the land's intrinsic value may be a contributing element for land donor motivation.

Apparently, humans require “other things” in their lives for psychological balance and well-being. Partridge refers to this need as “self-transcending” (Beatley 1994, 105). Partridge believes humans require a need to become self-fulfilled as well as from becoming alienated and narcissistic. People require things in their lives that remain independent and external to them. Partridge states:

Our personal and moral life is enriched to the degree that it is extended outward in self-transcending enjoyment, cherishing and contemplating things, places and ideas that are remote in space and time—ever, in a sense timeless” (Beatley 1994, 105).

Partridge continues by concluding that through this self-transcendence humans become able to:

...identify with, and seek to further, the well-being, preservation, and endurance of communities, locations, causes, artifacts, institutions, ideals, etc., which are outside themselves and which they hope will flourish beyond their own lifetimes” (Beatley 1994, 105).

While Olmsted and Eliot espoused humankinds’ duty and respect for nature, they also laid claim to their convictions by convincingly executing their works so others may be replenished through a natural setting. Sax and Partridge's claims further magnified Olmsted and Eliot's works stressing that natural surroundings provide humankind psychological balance, well-being, and fulfillment. Even Whyte observed the importance a prospective land owner places on the intrinsic values one associates with land, observing the land owner exhibits an almost a pathic quality towards its intrinsic value. Conclusively, Partridge claims nature and natural objects serve an important psychological function, and the possibilities for self-transcendence exist only through the protection of such resources (Beatley 1994, 106).
Finally, it may be stated these authors' opinions would be supportive for further inquiry for land-use ethics as a contributor to land donor motivation.

**Summary**

In summary, the literature review covers the perceived motivations for why a land owner may donate land to a land trust. These subjects include philanthropic definitions, the historical context of philanthropic motives—including ancient and modern views, ethical land-use influences, and a definition of altruism and egoism as appropriate for use in defining a research methodology for this thesis.

It may be stated that the land giving act is an extension of philanthropy. In the process leading towards the decision to donate the land, a land owner's motives tend to represent a blend of instrumental and intrinsic values. Some land owners may be more inclined to recognize the property for the instrumental or utilitarian value, such as tax deductibility benefits and to protect it from unwanted development. On the other hand, there are those land owners who attribute intrinsic values to their property, and believe the land represents their values of aesthetics, memorialization, and social purpose. However, in many cases it appears the land gift comes to fruition through a convergence of a number of these influences that in turn motivates the land owner to make a land contribution decision.

This leads to Beatley's views concerning ethical land-use and how it plays a role for motivating a land owner to make a land giving decision. Beatley believes that what one knows and what one feels towards land may guide one's decision in choosing to protect or care for it. Beatley (1994) perceives the land-use ethic as critical to a land owner's decision-making process—a process motivated by both facts and values (Beatley 1994, 19). Land donors, whether they are consciously aware of it or not, may practice an ethic that involves making and defending moral choices. It could be stated, based on Beatley's comments, the land-use ethic value contributes toward the motivational influence for one to give land.

On the other hand, a utilitarian perspective shows charitable deductions may be viewed as a tax incentive which may motivate one to donate land, as well as reinforce desirable tax law behavior (Coltfelter 1989, 117). Brenneman (1967) and Whyte (1959) make similar
observations by concluding tax codes offer incentives to the land owner who is considering donating property to a land trust. Jencks’ (1987) research reinforces the idea of tax code deductibility as a motivating element stating non-economic determinants affect an individual donor’s decision to make contributions; as exemplified by age, family structure, and community characteristics (Jencks 1987, 326-328). Being aware of this taxation information and knowing how to use it creatively allows those land owners who desire to protect land and receive a tax deduction for gifted property are generally motivated by this form of taxation (Brenneman 1967, 65; Whyte 1959, 36).

A number of authorities provide definitions of philanthropy. Bremner believes philanthropy represents those performing acts of giving to prevent and/or correct social and/or environmental problems, that would improve living conditions for people and creatures one does not know and that have no claim on those performing the act of giving (Bremner 1994, xi). Payton defines philanthropy as showing interest in the welfare of others (Payton 1989, 30); particularly through the inclusiveness of voluntary association, giving, and service (Gurin and Van Til 1990, 3). However, Payton believes if value is a preference, then the philanthropic act will always tend toward the altruistic end of a scale of preference and away from the egoistic (Payton 1989, 30). Van Til’s contemporary definition recognizes as improving the quality of life for all community members by promoting their welfare, happiness, and culture. Van Til means this to include interests and concerns of all income classes for environmental protection, historic landmark preservation, disease prevention, educational improvement, and art enhancement (Gurin and Van Til 1990, 4).

Classical writers’ observations and opinions have shaped the personal beliefs for how society should conduct itself in making contributions to one another and to their community. As Western civilization developed, so did religions’ ideologies with their accompany duties influencing their followers along structured paths of benevolence and charity towards others. Philanthropy as compared to charity, began to emerge in the 16th century following the Reformation. By the 17th century, England’s Statute of Charitable Uses of 1601, marked a milestone in an effort to establish charitable reforms.
In 1630, Winthrop's leadership in the early American colonial settlements saw the emergence of volunteerism as an inherent characteristic of the first settlers. Those motivated through their intuitive and personal acts of volunteerism advanced humanitarian and benevolent causes as well as instilled further philanthropic principles for the American colonial communities and their citizens. Similarly, the grass-roots initiative of land owners to donate property to a land trust resounds a similar volunteeristic spirit of the early colonists. For whatever reasons or influences, private land owners, along with local collective citizenry efforts, act to protect landscapes for others to benefit without the need of government's involvement. These activities suggest land donors are motivated to give land from the perspective of allowing their unique landscape to be shared with and to be for the benefit of all members of the community. The donor of a land gift, either fee simple or a conservation easement, must meet the requirement that the property be of benefit and be accessible to the public. Adhering to these additional requirements for the property being considered for donation, may cause a land owner's motive to give land in part to be influenced by what extent the owner's land gift will benefit the community.

Kant's theory of the *categorical imperative* acknowledged that the will of the rational being exists autonomously as a law unto itself and that the individual is capable of acting in good fashion to achieve moral action (Griffith 1984, 21-22). The *Kantian act* places the donor in the position of caring more about the act of giving than the result or the price (Griffith 1984, 21-22). Kant's theory has come to be a fundamental principle in modern philosophy and forms a basis of reason for what motivates an individual to give. If so, then subsequently, land owners acting of free will to donate land to a land trust, may indeed be motivated by the actual act of "giving the land" than the self-benefit obtained from other influences.

Delavan's attitude toward wealth disbursement reflected a decision to give or not to give based on wealth surplus. This carried over to value he placed in civic matters and the assurance of ones benefits to surviving family members as how Delavan would be inclined to leave one's wealth to future concerns. Similarly, this may be reflected in a land owner's motivation for deciding to donate land to a land trust. These influencing reasons give rise to
the possibility that in trying to identify one's motives for land giving, necessitates accounting for the intergenerational transfer of land property for its appropriate future use.

The philanthropic views of Carnegie and Rockefeller changed the way gift giving was approached by wealthy individuals during the later portion of the 19th century and beginning the 20th century. Carnegie's and Rockefeller's philanthropic examples led to a systematic manner in which the very wealthy wisely approached the selection of their recipients to insure proper use of one's wealth occurred during the donor's lifetime. The Rockefeller motivation to give may be due to what Harr and Johnson observed as being the family's strong religious principles coupled with their classical sense of civic duty. Similarly, this family tradition has associated with it the pressures of training and preconditioning in one's youth to accept the family's legacy of influential philanthropic wealth. Additionally, to these influences Harr and Johnson perceived philanthropists' motivations were most likely driven by gratification of ego, expiation of guilt, quest of power, and desire for popularity (Harr and Johnson 1988, 9).

Altogether, it could be summarized philanthropy as it is being referred to for this research, represents a concern or a visible act of caring for humankind and living creatures, as well as natural and cultural surroundings that benefits the quality of life for all community members by promoting their culture, happiness, and health. Those that perform a philanthropic act generally do so within the spirit of voluntary association with an emphasis towards the value of giving and service to others or special concerns. It may be stated that philanthropic acts are indicative of altruism as a value preference, although it can not be denied egoism is part of the act also. Thus, philanthropy has evolved over the centuries to where it now encompasses the land owner's choice to give land to a land trust for perpetuity—not just exclusively members of the humankind caring for the causes and/or the other members of humankind. Hands provides a condition to thinking an absolute definition of philanthropy is obtainable as he concludes: "Philanthropic activity can never be understood (or defined) except against the background of the social ethos of the age to which it belongs" (Hands 1967, 7).

Prince and File (1994) provide insight to the altruistic donor that could give further clarification to the land donor's motivational personality (Prince and File 1994, 9). On the
other hand, Batson's (1991) definition for altruism through the examination of Comte's altruism-egoism concept, remains largely a modern redefinition of Comte's altruism concept (Batson 1991, 6). A closer look though at the Prince and File segmentation model, shows the positive image reinforcement of the seven donor segments—repayers, communitarians, socialites, altruists, devoutists, investors, and dynasts—are essentially personality types driven by either altruistic or egoistic motivational behavior. In comparison, the Prince and File's model appears to apply a finer filter for determining the donor personality types, against the background of Batson's altruism-egoism definition. This perspective is based on Batson's discussion of a modern definition of altruism-egoism behavior for motivating one to give—that is human behavior motivated towards giving is doing so fundamentally from a position of either altruism and/or possibly to a certain degree egoism (Batson 1991, 6-7). Furthermore, noted writers and philosophers contend all good altruistic actions include being driven by self-benefitting behavior (Batson 1991, 2-4; Dewey 1978, 368-369). As a modern perspective, Gamwell and Margolis each have different views on the altruism-egoism motivation behavior discussion—yet both recognize they tend to exist simultaneously within one individual so the motivation goal is allowed to occur (Burlingame 1993, 2-3).

Collectively, the aforementioned philosophers and researchers provide opinions whereby an inference may be made to conclude altruism and egoistic behaviors coexist intrinsically within an individual so as to motivate one to give. It should be noted the literature review found no substantive data on what motivates a land owner to give land to a land trust. Altogether the literature review makes evident a number of motivating influences that point toward developing the type of questions which need to be asked concerning what motivates a land owner to give land to a land trust. Therefore, in developing a research methodology the major objective of testing the research would be to attempt to test it against Batson's definition for altruism-egoism as the motivation to give land. Such an analysis would suggest testing for a continuum, dichotomy, or a synergistic combination of these influences for altruistic behavior versus influences of egoistic behavior in the philanthropic motive to give land to a nonprofit conservation organization such as a land trust.
NOTES

1. Two studies were uncovered addressing motives and their relationship to natural surroundings. First, the dissertation “Economic Motives for Contributing to the Nature Conservancy” explores alternative explanations for private contributions to the Nature Conservancy, (Griffith 1984, 1). Second, the published paper “Management of Farm Woodlots and Windbreaks: Some Psychological and Landscape Patterns,” investigates the relationship between farmers’ conservation attitudes and motivations and their self-reported and observed management of windbreaks and woodlots (Erickson and DeYoung, 1993, 233). While portions of these works acknowledge human behavior’s relationship to natural surroundings, upon reviewing them, it became evident investigation of the literature surrounding this thesis topic from an original perspective would be necessary.

2. Prince and File define a affluent/wealthy individual donor as a person who maintains $1 million or more in a discretionary investment advisory account and who contributed $50,000 or more to a single nonprofit within the last two years (Prince and File 1994, 9).
CHAPTER III
DEVELOPMENT OF THE RESEARCH SURVEY INSTRUMENT

Context of Respondents

Given the variety of potential motivations for donating land, this study attempts to determine the motivations which may drive land donor motivation behavior. The respondents were land trust administrators drawn from a directory of nationwide land trusts. There were several reasons for surveying land trust administrators rather than land donors. First, directly surveying donors would have required an expensive and cumbersome two-step process—initially contacting land trusts to identify donors for the survey and then contacting the donors directly. Because it was felt some donors may request anonymity in their gifts, it was unlikely that a list of selected survey respondents would be entirely representative of all land donors. Secondly, it was ascertained the land trust administrators would likely remember the extent to which accountants and tax lawyers structured the gift—possibly including a tax benefit, the possible extent to which the donor sought (egoistic motivation) or shunned (altruistic motivation) recognition, and other indicators of motivation in a transaction. After considering issues of time, resources, and confidentiality, the decision was made to use these leaders of the land trusts as the respondents.

A mailed questionnaire was used to collect the data in this study. Survey questions were developed for the land trust administrators to measured perceived attitudes, attributes, behaviors, beliefs, events, policies, and values that could motivate land owners to donate their property or to give conservation easements. It was assumed that many factors influence land donors, with some being more salient than others (Marshall and Rossman 1989, 78).

Selection of Respondents

A national listing of land trust organizations was obtained from the 1991-92 National Directory of Conservation Land Trusts (Bacher 1991). This directory contained a list of 889 land trusts throughout the United States, Puerto Rico, and the Virgin Islands. It provided
information on the number of years of land trust operation, size of their staffs, annual operating budgets, geographical localities, types of lands being protected, legal mechanisms used to protect land, and the number of acres under protection. After reviewing the land trusts’ characteristics, it became evident of the need to concentrate on administrators’ management of land trusts with selected attributes. The attributes selected included land trusts which protected 1,000 acres or more, either through conservation easement holdings or direct ownership. This screen yielded a sufficiently large number for analytical purposes, or 197 land trusts’ administrators.

A previous 1990 survey of the geographical distribution of land trust organization membership conducted by the Land Trust Alliance (Bacher 1991, v) was compared to the geographical distribution of land trust respondents partaking in this study in 1994. As presented in Figure 3.1, the geographical distribution was almost the same for each study; however, the Land Trust Alliance survey did not indicate the states included in each region that was polled. The comparison indicated land trust administrators selected for the present research study had a similar geographic distribution to the trusts polled in the Land Trust Alliance 1990 membership survey, with a total membership of 889 land trusts (Bacher 1991, v). The ability to provide a similar comparison of land trust administrators and land trust membership organization responses made it apparent that the survey was representative of the total land trust organization membership regarding geographical distribution.

The land trust administrators became the critical source for compiling accurate data about the characteristics and beliefs of their land donors. Surveying the land trust administrators rather than the donors, inherently limits knowledge of the land donors’ tacit and deeply held values (Marshall and Rossman 1989, 83). However, it was perceived that selecting the land trust administrators as the respondents would provide the essential insight to their land donors’ motives. One should understand the basis for selecting them was similar to the methodology used in The Syracuse Leadership Studies during the 1960s. That study found knowledgeable were reliable sources of information concerning their larger organization or community—hence those findings provide validity for selecting the land trusts’ administrators as respondents (Freeman, 1968).
Figure 3.1 The geographical distribution of land donors throughout the U.S.
(National Directory of Conservation Land Trusts (Bacher 1991))
Research Procedures

The following procedures were used to identify the respondents and to obtain information.

2. Only land trusts protecting upwards of a minimum of 1,000 acres, through either conservation easement holdings and/or as land directly donated as fee simple, were selected for inclusion in the present study.
3. Land trust directors, or their elected officers, were solicited through mailed questionnaires to provide the data for analysis.
4. Differences found in the analysis were deemed the real differences since the surveyed land trust administrators constituted the universe, or the complete population of all known land trusts having 1,000 or more acres under protection.
5. One hundred ninety-seven land trusts were selected, of whom 104 (53%) land trust administrators responded. Considering the organizational characteristics—geographic regional distribution of land donors and the 1,000 acre minimum of protected land—there was no discernible variation between the non-responding land trust administrators and the land trust administrators responding.

Questionnaire Development

Input for the questionnaire development was received from Dr. Norman L. Dietrich, Department of Landscape Architecture; Dr. Gordon L. Bultena, Department of Sociology; and Dr. Timothy O. Borich, Institute for Design Research and Outreach, all of Iowa State University. Survey questions were developed based on the motivational information obtained from the review of literature. Specifically, these questions were selected to provide data on the land donors' motivations, and also to recognize the land trust's administrator as the respondent representing the land donors. Tax benefits to land owners and their altruistic concerns to protect lands were fundamental concerns in developing the survey questionnaire. However,
geographic representation, community ties, and assistance from others became additional themes of inquiry to see if these factors contributed significantly to motivating land owners to give land to a land trust.

The final questionnaire included eight question categories. The question categories were:

1) donors' community ties;
2) assistance used by donors;
3) factors affecting land donors' attitudes;
4) donors' land gift types;
5) dollar value of land donations;
6) donors beliefs;
7) donors' giving trends; and
8) donors' tendencies towards issues.

In turn each category was in at least one of the four question types: belief, behavior, attitude, and attributes (Dillman 1978, 120-49; and Appendix VI, An Overview for the Design and Development of the Questionnaire).

Questionnaire Implementation

A well-designed questionnaire assures a higher response rate (Dillman 1978, 120). A cover letter prepared on Iowa State University letterhead stationery was sent with each questionnaire to explain the purpose of the research study (Appendix VII, Cover Letter to Respondents). It described the study, the importance of the respondent’s participation, the potential benefits of the research findings to the respondent, instructions for completing the questionnaire, assurance of confidentiality, assertion of voluntary participation, and a specified date by which the questionnaire was to be returned. The name of the project director and a telephone number were also included. In addition, each respondent was given the opportunity to request a copy of the results of the survey.

To pretest the questionnaire, cover letters and questionnaire booklets were sent to nine land trust professionals across the nation (Appendix VIII, Pretest Cover Letter; and Appendix...
These land trust professionals were selected as typical of respondents who would participate in the final survey. In addition to responding to the questions, those participating in the pretest were asked to critically review the questionnaire and suggest changes to improve the overall quality (Appendix VII, Cover Letter to Respondents; and Appendix X, Post Card Reminder).

Responses were received from eight of the nine persons contacted to pre-test the questionnaire. Most of the responses were positive. In addition, there were several constructive comments from several of the pretest professionals. Suggestions were made to place less emphasis on “donors tendencies towards issues,” particularly since the focus of the questionnaire was to obtain data on motivation. The questions that were eliminated dealt with preservation, recreational, and scenic issues. These adjustments were made accordingly prior to mailing the questionnaire. A copy of the final questionnaire was then sent to the Iowa State University Human Subjects Review Committee for approval. A signed copy of the approval form is located in Appendix III, Human Subjects Review Committee Application.

First Mailing and Follow-Up

Questionnaires were mailed to land trust administrators or to other officials in land trust organizations who could provide the information required for this study. These officials were deemed to be familiar with their organizations’ land donors, and thus were felt to be able to respond to the questions in an informed manner. Where a land trust had no elected executive officer, the questionnaire was sent with the instruction that it be completed by the most appropriate and knowledgeable professional.

A total of 197 questionnaires were sent to land trust administrators across the U.S. and its territories. The first mailing was completed by November 11, 1994, and responses were requested by November 30, 1994. A total of 83 were returned. This low response rate was partly attributed to the Thanksgiving Day holiday weekend. Therefore, the initial mailing was followed by a postcard reminder thanking the respondents for returning their questionnaires or, if not returned, to remind them to complete it (Appendix X, Postcard Reminder).
January 1995, 21 additional responses were received, bringing the total number of respondents to 104, for a 53% response rate.

Representativeness of Respondents

A 53% response rate was deemed adequate for research purposes, therefore it was decided not to pursue a second mailing. Based on the characteristics of the selected land trust organizations, the representativeness of respondents was felt to be an acceptable reflection of the total 197 land trust organizations receiving questionnaires. This survey constituted an initial inquiry into the motivations of land donors. The findings were intended to lay the groundwork for further and more in-depth research on land donor motivation.

Data Processing

Data were analyzed using the SPSS-X Release 4.1 for IBM OS/MVS statistical software program (SPSS Inc., 1988). This software system was selected as a comprehensive tool for managing, analyzing, and displaying information. The first step was to conduct a descriptive analysis. Other statistical tests consisted of factor and reliability analyses to test for differences between subgroups of respondents and to determine relationships between variables.
CHAPTER IV

SURVEY RESULTS

Introduction

Results of this exploratory study are drawn first from a descriptive analysis and, second, a more in depth analysis of data for the motives for making land donations. The results are drawn from information obtained from 104 land trust administrators who participated in a nation wide survey. Much of the survey dealt with land trust administrators’ perceptions of their land donors’ attitudes, beliefs, values, and motivations to donate a conservation easement or land fee simple to a land trust (Appendix IX, Questionnaire). The survey data is presented in two sections. First, attention is paid to the motivations that the respondents perceived being important for persuading the land owners to donate land to their land trusts. Secondly, the designated ancillary motivational responses of the land donors and characteristics of the land donated are assessed (Appendix XI, Ancillary Descriptive Analysis).

Perceived Motivations for Land Donations

In response to the thesis topic: the motivations of land owners to donate conservation easements and their property to land trusts, the following two groups of questions provided the data which appeared as essential with regards to land donors’ motives. Responding land trust administrators provided their perceptions of their land donors’ motivations and beliefs through the following questions:

1) Questions 19-32 dealt with the importance of various influences for motivating a land donor to donate land; and

2) Questions 39-43 explored the donors’ beliefs for making a land donation.

The respondents were presented a list of 13 items identifying the possible different types of motivations for land donations. The respondents were asked to rate the importance of each of these 13 motivations in regards to their respective land donors. Each motive was rated on a five point scale, ranging from 1 (not important) to 5 (very important). Table 4.1, Perceived
Motivations for Land Donations presents the distributions and average scores of these motivations. Question 30, “the donor had an enjoyable relationship with the donee land trust” (mean = 3.8) was deemed not essential since the question could have possibly elicited a biased perception by the respondent. It was deleted from further examination.  

**Motives for making land donations**  

Land trust administrators reported what they perceived to be the most important factors influencing persons to donate land to a land trust (Appendix IX, Questionnaire, questions 19-32). Table 4.1 reports the respondents appraisal of the importance of some possible factors affecting the motivations of land donors to give land to a land trust. The two items receiving the most frequent responses were:

1) protecting one’s land from being developed, or used for an undesirable purpose (mean = 4.2); and  
2) reducing one’s federal estate taxes (mean = 3.4).

To add further meaning to these motivational items, they were defined as to having either an altruistic or egoistic motive with regards to the altruism-egoism motivational behavior as defined by Batson (1991) as presented in Chapter II. These definitions were applied to questions 19-32 for defining the land donor’s motivation as being either altruistic or egoistic. Influences having mean values of 3.0 or greater appear to be the most important for affecting a land owner’s decision to give land:

1) ranked first was the item: using the donation to prevent their land from being developed for other purposes (mean = 4.2); and  
2) closely ranked second was: reduction of federal estate taxes (mean = 3.4).

The third ranked motive was, land was important to the family’s history and needed protection, (mean = 3.1). It was followed by the fourth ranked motive knew of other land owners that had done the same thing (mean = 3.1). Altogether, from the data analyzed, it would appear the motives having the most significant impact on land owners for influencing them to make the decision to donate land were to:
Table 4.1 Perceived motivations

<table>
<thead>
<tr>
<th>Rank</th>
<th>Motive</th>
<th>N</th>
<th>1</th>
<th>2</th>
<th>3</th>
<th>4</th>
<th>5</th>
<th>Mean</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Donation to prevent land from being developed for other purposes</td>
<td>101</td>
<td>2</td>
<td>4</td>
<td>12</td>
<td>37</td>
<td>45</td>
<td>4.2</td>
</tr>
<tr>
<td>2</td>
<td>Reduction of federal estate taxes</td>
<td>102</td>
<td>12</td>
<td>9</td>
<td>32</td>
<td>30</td>
<td>17</td>
<td>3.4</td>
</tr>
<tr>
<td>3</td>
<td>Land was important to the family's history and needed protection</td>
<td>102</td>
<td>16</td>
<td>11</td>
<td>38</td>
<td>20</td>
<td>15</td>
<td>3.1</td>
</tr>
<tr>
<td>4</td>
<td>Knew other land owners that donated land</td>
<td>102</td>
<td>8</td>
<td>17</td>
<td>28</td>
<td>39</td>
<td>8</td>
<td>3.1</td>
</tr>
<tr>
<td>5</td>
<td>Land contained an ecosystem with unique, rare, or endangered plant or wildlife species</td>
<td>102</td>
<td>19</td>
<td>18</td>
<td>34</td>
<td>12</td>
<td>17</td>
<td>2.9</td>
</tr>
<tr>
<td>6</td>
<td>Land contained recreation and/or outdoor educational features attractive to the general public and local communities</td>
<td>102</td>
<td>24</td>
<td>14</td>
<td>30</td>
<td>21</td>
<td>11</td>
<td>2.8</td>
</tr>
<tr>
<td>7</td>
<td>Felt philanthropic activities are important</td>
<td>102</td>
<td>21</td>
<td>14</td>
<td>42</td>
<td>18</td>
<td>5</td>
<td>2.7</td>
</tr>
<tr>
<td>8</td>
<td>Reduction of state estate taxes</td>
<td>101</td>
<td>30</td>
<td>9</td>
<td>30</td>
<td>22</td>
<td>9</td>
<td>2.7</td>
</tr>
<tr>
<td>9</td>
<td>Reduction of local property taxes</td>
<td>101</td>
<td>28</td>
<td>15</td>
<td>31</td>
<td>13</td>
<td>13</td>
<td>2.6</td>
</tr>
<tr>
<td>10</td>
<td>Land contained regionally significant or prime farmland</td>
<td>99</td>
<td>37</td>
<td>20</td>
<td>18</td>
<td>16</td>
<td>9</td>
<td>2.3</td>
</tr>
<tr>
<td>11</td>
<td>Land contained cultural or historical sites/structures</td>
<td>102</td>
<td>35</td>
<td>32</td>
<td>16</td>
<td>8</td>
<td>9</td>
<td>2.3</td>
</tr>
<tr>
<td>12</td>
<td>Influenced by donors' peers</td>
<td>102</td>
<td>36</td>
<td>15</td>
<td>16</td>
<td>24</td>
<td>9</td>
<td>2.1</td>
</tr>
<tr>
<td>13</td>
<td>Reduction of state property taxes</td>
<td>94</td>
<td>52</td>
<td>26</td>
<td>10</td>
<td>7</td>
<td>5</td>
<td>1.9</td>
</tr>
</tbody>
</table>
1) protect the current land use status of the property;
2) achieve a personnel financial benefit;
3) preserve a family legacy; and
4) be adaptive to the favorable influence of others’ knowledge (peer influence) about their previous land giving processes and experiences.

The nine remaining motive items all had mean scores of 2.9 or less. However, six of those nine had mean scores between 2.5 and 2.9. These six motive items ranked as follows:

1) “their land contained a unique, rare, or endangered plant or wildlife species,” (mean = 2.9),
2) “one’s property contained recreation and/or outdoor educational features attractive to the general public and the local communities,” (mean = 2.8);
3) “the importance of their family’s philanthropic activities,” (mean = 2.7);
4) “the reduction of state estate taxes,” (mean = 2.7);
5) “the reduction of local property taxes,” (mean = 2.6); and
6) “the land contained regionally significant or prime farmland” (mean = 2.5).

The three remaining motive items considered “less than moderately important” to a land owner’s donation decision making process ranked as follows:

7) “land contained cultural or historical sites/structures” (mean = 2.3);
8) “the land owner was influenced by peers” (mean = 2.1); and
9) “the reduction of state property taxes” (mean = 1.9).

Defining the altruism-egoism phenomenon

The literature review in Chapter II discusses authoritative sources that provide their interpretive definitions of altruism and egoism as components of human behavior (Burlingame, 1993). Also, the review of literature found no substantive studies conducted for what motivates a land owner to give land to a land trust. However, Batson provided a modern redefinition of Comte’s concept of altruistic and egoistic motives of human behavior. Regarding other authoritative sources on giving as discussed in the literature review, taken
altogether, Batson's recent and extensive work addressing altruism and egoism provides a definition for each of these terms. Batson defines altruism as: "...altruism is a motivational state with the ultimate goal of increasing another’s welfare" (Batson 1991, 6). In the context of understanding the behavior for giving, Batson defined egoism: as a motivational state with the ultimate goal of increasing one's welfare (Batson 1991, 7). Knowing these definitions allows the land donor motive items to be defined in terms of altruistic or egoistic expressions of motivational behavior (Bohnstedt and Knoke 1988, 12). These definitions were then applied to the 13 donor motive items (Batson 1991, 6).

Each item in Table 4.1 reflects aspects of altruism, egoism, and/or possibly both. An example: “the protection of one’s property from unwanted development” may be indicative of a highly egoistic motive; while “donating lands so as to protect regionally significant and/or prime farm land from development” tends to suggest a tendency towards an altruistic motive (Batson, 1991; Burlingame, 1993). The influencing aspects of the land donation motive—such as beliefs “for protecting an ecosystem, open space recreational and/or educational features for the public,” “adhering to their family’s traditional philanthropic values”, and “the reduction of a land owner’s state estate taxes” represent motive items indicative of mean scores of 2.9 or less as reported in Table 4.1. Nevertheless reflecting on Margolis, it may be highly possible whatever the land trust administrators’ perceptions for a motive to influence the land owner to give land, each motive potentially reflects a synergistic combination of altruistic and egoistic motivational behavior (Burlingame 1993, 3). This event is what Margolis refers to as the concept of NSNX—that is “neither selfish or exploited.”

Having established this definition for how altruism and egoism would be applied in this study, the next step was to identify the motive items as being either an altruistic or egoistic motivational influence for land donation. Determining whether an item would be considered altruistic or egoistic was decided by the researcher on face validity of the item drawn from Batson’s (1991) definition of altruism and egoism as discussed in Chapter II. Each of the 13 items were defined as either an altruistic or an egoistic motive for land giving. It could be stated those land motive items most nearly representing behavior to be associated with the ultimate goal of increasing one’s welfare state, would be termed egoistic (Batson 1991, 7).
Likewise, those land motive items most nearly representing behavior to be associated with the ultimate goal of increasing another's welfare state would be termed altruistic (Batson 1991, 6). For example, the item “to protect land property containing an ecosystem with unique, rare, or endangered plant or wildlife species” would be identified as an altruistic item. On the other hand, a land owner motivated to give land solely to protect it or for the opportunity to receive the “reduction of one's federal estate taxes,” would represent an egoistic variable. Table 4.2 presents these items that comprise a scale for altruism and egoism.

<table>
<thead>
<tr>
<th>Altruistic&lt;sup&gt;c&lt;/sup&gt;</th>
<th>Mean</th>
<th>Egoistic&lt;sup&gt;d&lt;/sup&gt;</th>
<th>Mean</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Knew other land owners that donated land&lt;sup&gt;e&lt;/sup&gt;</td>
<td>3.1</td>
<td>1. Used the donation to prevent land from being developed for other purposes</td>
<td>4.2</td>
</tr>
<tr>
<td>2. Land was important to the family's history</td>
<td>3.1</td>
<td>2. Reduction of federal estate taxes&lt;sup&gt;e&lt;/sup&gt;</td>
<td>3.4</td>
</tr>
<tr>
<td>3. Land contained an ecosystem with unique, rare, or endangered plant or wildlife species&lt;sup&gt;e&lt;/sup&gt;</td>
<td>2.9</td>
<td>3. Reduction of state estate taxes&lt;sup&gt;e&lt;/sup&gt;</td>
<td>2.7</td>
</tr>
<tr>
<td>4. Land contained recreational and/or outdoor educational features attractive to the general public and local communities&lt;sup&gt;e&lt;/sup&gt;</td>
<td>2.8</td>
<td>4. Belief in the importance of their family's philanthropic activities&lt;sup&gt;e&lt;/sup&gt;</td>
<td>2.7</td>
</tr>
<tr>
<td>5. Land contained regionally significant or prime farm land&lt;sup&gt;e&lt;/sup&gt;</td>
<td>2.5</td>
<td>5. Reduction of local property taxes&lt;sup&gt;e&lt;/sup&gt;</td>
<td>2.6</td>
</tr>
<tr>
<td>6. Land contained cultural or historical sites/structures&lt;sup&gt;e&lt;/sup&gt;</td>
<td>2.3</td>
<td>6. Reduction of state property taxes&lt;sup&gt;e&lt;/sup&gt;</td>
<td>1.9</td>
</tr>
<tr>
<td>7. Belief in the influence of the donor's peers&lt;sup&gt;*&lt;/sup&gt;</td>
<td>2.1</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<sup>a</sup> Cronbach's alpha for altruistic items = 0.46
<sup>b</sup> Cronbach's alpha for egoistic items = 0.51
<sup>c</sup> Average item score for altruistic scale = 2.60
<sup>d</sup> Average item score for egoism scale = 2.80
<sup>e</sup> Indicates item in the scale
Analysis of Motives

Statistical applications deemed appropriate for providing further insight to the role of altruism and egoism in land donor motivations were utilized. Questions 19-32 were examined by applying a factor analysis to the 13 items influencing land owners' motivations to donate land. Initially, a factor analysis identified a relatively small number of factors, or motive items to be used to represent relationships among sets, or motive identity groups, of many interrelated variables (Norusis 1993, 47). However, a number of factor analysis attempts were performed yielding factors which were viewed as insufficient.

The next step was to test for reliability. As a general rule, reliabilities should not be below an alpha value of $\alpha = 0.80$ as a standard for most scales (Carmines and Zeller 1979, 51). The first reliability test showed an alpha value of $\alpha = 0.44$ for the altruistic scale and, an alpha value of $\alpha = 0.18$ for the egoistic scale. Based on a standard of $\alpha = 0.80$, these levels were deemed too low to warrant considering the items for constituting scales.

Raising the alpha levels of each of the two scales was attempted by omitting selected variables. Question 22 from the altruistic scale: “land was important to the family’s history,” and question 31 from egoism scale: “used the donation to prevent their land from being developed for other purposes,” were omitted from the reliability test. Question 30: “had an enjoyable relationship with their land trust staff during the land donation process” was also omitted since it appeared to represent a biased response. This second reliability test increased the alpha level for the altruistic scale to $\alpha = 0.46$ and, for the egoistic scale at $\alpha = 0.51$. The altruistic scale was comprised of six variables, while the egoistic scale consisted of five variables. Table 4.3 presents significant or nonsignificant correlation among the selected variables and the altruistic and egoistic orientations.

A zero order correlation was computed to ascertain the relationship between measures of altruism and egoism. Table 4.3, displays these correlations. Table 4.4 shows the zero order correlations between altruism and egoism measures with respective components. It was originally thought there would be a negative relationship between the individual measures of altruism and egoism. However, a significant positive relationship existed between the two scales of altruism and egoism. The relationship had a correlation value of 0.20, significant at
Table 4.3 Correlations between the altruistic and egoistic orientation

<table>
<thead>
<tr>
<th>Selected Variables</th>
<th>Altruistic</th>
<th>Egoistic</th>
</tr>
</thead>
<tbody>
<tr>
<td>Altruistic</td>
<td></td>
<td></td>
</tr>
<tr>
<td>1. Land contained an ecosystem with unique, rare, or endangered plant or wildlife species</td>
<td>.54**</td>
<td>.16</td>
</tr>
<tr>
<td>2. Land contained cultural or historical sites/structures</td>
<td>.53**</td>
<td>-.03</td>
</tr>
<tr>
<td>3. Land contained regionally significant or important prime farmland</td>
<td>.60**</td>
<td>.25*</td>
</tr>
<tr>
<td>4. Land contained recreation and/or outdoor educational features attractive to the general public and local communities</td>
<td>.52**</td>
<td>-.10</td>
</tr>
<tr>
<td>5. Belief in the influence of the donor's peers to donate land</td>
<td>.46**</td>
<td>.20</td>
</tr>
<tr>
<td>6. Knew other land owners that donated land</td>
<td>.58**</td>
<td>.21</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Egoistic</th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Reduction of local property taxes</td>
<td>-.06</td>
<td>.54**</td>
</tr>
<tr>
<td>2. Reduction of state property taxes</td>
<td>.06</td>
<td>.59**</td>
</tr>
<tr>
<td>3. Reduction of state estate taxes</td>
<td>.07</td>
<td>.76**</td>
</tr>
<tr>
<td>4. Reduction of federal estate taxes</td>
<td>.09</td>
<td>.68**</td>
</tr>
<tr>
<td>5. Belief in the importance of their family's philanthropic activities</td>
<td>.35</td>
<td>.40**</td>
</tr>
</tbody>
</table>

* Significant if $p < 0.05$  
** Significant if $p < 0.01$

the 0.05 level. Thus an $r$ value at this level indicated that, as values of the altruistic variables increased, the values of the egoistic variables also increased correspondingly. An example of this appears to be the altruistic motive "knew of others that had done the same thing" which correlated positively with several egoistic variables. An example would be the influence of the egoistic motive of: "reduction of federal estate taxes" and/or the "belief in the importance of their family's philanthropic activities." Likewise, this trend held true: as one of the altruistic/egoistic variables' values decreased, the value of an altruistic/egoistic variable decreased.
Table 4.4 Zero order of correlation between altruism and egoism measures with respective components

<table>
<thead>
<tr>
<th>Item</th>
<th>Altruism</th>
<th>Egoism</th>
<th>Occurrence Group 1</th>
<th>Occurrence Group 2</th>
<th>Occurrence Group 3</th>
</tr>
</thead>
<tbody>
<tr>
<td>Q-19</td>
<td>Land contained an ecosystem with unique, rare, or endangered plant or wildlife species.</td>
<td>.54**</td>
<td>.16</td>
<td>.14</td>
<td>.10</td>
</tr>
<tr>
<td>Q-20</td>
<td>Land contained cultural or historical sites/structures</td>
<td>.53**</td>
<td>-.03</td>
<td>.20</td>
<td>-.13</td>
</tr>
<tr>
<td>Q-21</td>
<td>Land contained regionally significant or important prime farmland</td>
<td>.60**</td>
<td>.25*</td>
<td>1.00</td>
<td>.32**</td>
</tr>
<tr>
<td>Q-23</td>
<td>Land contained recreation and/or outdoor educational features attractive to the general public and local communities</td>
<td>.52**</td>
<td>-.10</td>
<td>.07</td>
<td>.14</td>
</tr>
<tr>
<td>Q-29</td>
<td>Belief in the influence of the donor’s peers to donate land</td>
<td>.46**</td>
<td>.20</td>
<td>.17</td>
<td>.50**</td>
</tr>
<tr>
<td>Q-32</td>
<td>Knew other land owners that donated land</td>
<td>.58**</td>
<td>.21</td>
<td>.29**</td>
<td>.27**</td>
</tr>
</tbody>
</table>

Egoistic

<table>
<thead>
<tr>
<th>Item</th>
<th>Altruism</th>
<th>Egoism</th>
<th>Occurrence Group 1</th>
<th>Occurrence Group 2</th>
<th>Occurrence Group 3</th>
</tr>
</thead>
<tbody>
<tr>
<td>Q-24</td>
<td>Reduction of local property taxes</td>
<td>-.06</td>
<td>.54**</td>
<td>-.09</td>
<td>-.21*</td>
</tr>
<tr>
<td>Q-25</td>
<td>Reduction of state property taxes</td>
<td>.06</td>
<td>.59**</td>
<td>-.04</td>
<td>-.12</td>
</tr>
<tr>
<td>Q-26</td>
<td>Reduction of state estate taxes</td>
<td>.07</td>
<td>.76**</td>
<td>.16</td>
<td>.14</td>
</tr>
<tr>
<td>Q-27</td>
<td>Reduction of federal estate taxes</td>
<td>.09</td>
<td>.68**</td>
<td>.32**</td>
<td>.33</td>
</tr>
<tr>
<td>Q-28</td>
<td>Belief in the importance of their family’s philanthropic activities</td>
<td>.35**</td>
<td>.40**</td>
<td>.32**</td>
<td>1.00</td>
</tr>
</tbody>
</table>

* Significant if $p < 0.05$
** Significant if $p < 0.01$
\* Shaded numbers indicate a motive correlation between either an altruistic and egoistic measure
correspondingly. An example of this instance, "belief in the importance of their family's philanthropic activities" as an egoistic value would closely correlate positively with the altruistic variable "their land contained regionally significant or important prime farmland." These correlations indicated a positive significant relationship between the measure of altruistic and egoistic motivational behavior ($r = 0.20$).

Table 4.4 indicates three "occurrence groups" exhibiting altruistic and egoistic variables signifying a positive significant relationship between measures of altruism and egoism. The first "occurrence group" showed the altruistic value: "land contained regionally significant or important prime farmland" correlated with the egoistic values: "reduction of federal estate taxes" and "belief in the importance of their family's philanthropic activities." These correlations would most likely indicate an owner of regionally significant or prime agriculture land may be motivated to give land through the influence of the reduction of federal estate taxes, and the land owner's belief in the importance of the family's philanthropic activities.

The second "occurrence group," reflected the egoistic motive: "the belief in the importance of their family's philanthropic activities" and its correlation to these altruistic motives:

- "the donor's land contained regionally significant or important prime farmland;"
- "donor's belief in the influence of the donor's peers for donating land;" and
- "knew of other land owners that donated land."

The third "occurrence group," exhibited the altruistic motive of "knew other land owners that had done the same thing" and its correlation to the same previously mentioned egoistic motives. Considering the previous "occurrence group," it may appear two altruistic motives correlate positively to both "federal estate tax reduction" and "the belief in the importance of their family's philanthropic activities." This occurrence in the present study indicates there is a large number of responses from those land owners who believe in the protection of the prime agricultural farmland, and do so through the influence of the importance of their family's philanthropic activities, and the opportunity to reduce their federal estate taxes.
These correlations indicate that the motives: "their family's philanthropic activities" and "peer influence" play a significant role for motivating a land owner to donate land. The land owner's fellow peers' experiences and other significant information is passed on to the land owner contemplating a land donation decision. Thus, it is highly possible: "belief in protection of regionally significant or important prime farmland," the "belief in the influence of others," or the "knowledge of other donors having donated land," are elements contained in what might be termed a "peer information exchange" factor. If so, these correlations affect the land owner's decision to donate land to a land trust. Thus, the influence of their family's belief in philanthropic activities serves as an egoistic motive positively affecting land donor motivation.

### Table 4.5 Donors' beliefs

<table>
<thead>
<tr>
<th>Rank</th>
<th>Beliefs</th>
<th>Frequency of Belief (%)</th>
<th>N</th>
<th>None</th>
<th>Some</th>
<th>Most</th>
<th>Percent</th>
<th>Mean</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Expressed beliefs consistent with their land trust's mission and programs to which the donor has given land</td>
<td></td>
<td>102</td>
<td>1</td>
<td>12</td>
<td>87</td>
<td>100</td>
<td>2.9</td>
</tr>
<tr>
<td>2</td>
<td>Expressed a strong commitment to conservation and land stewardship</td>
<td></td>
<td>102</td>
<td>2</td>
<td>18</td>
<td>80</td>
<td>100</td>
<td>2.9</td>
</tr>
<tr>
<td>3</td>
<td>Sought to protect a certain type of landscape (e.g., scenic pristine, wilderness, historical, or cultural)</td>
<td></td>
<td>102</td>
<td>4</td>
<td>20</td>
<td>76</td>
<td>100</td>
<td>2.7</td>
</tr>
<tr>
<td>4</td>
<td>Indicated they wanted to &quot;give something to their community&quot;</td>
<td></td>
<td>102</td>
<td>11</td>
<td>54</td>
<td>35</td>
<td>100</td>
<td>2.3</td>
</tr>
<tr>
<td>5</td>
<td>Felt that their land donation was for altruistic purposes, or &quot;the joy of giving&quot;</td>
<td></td>
<td>102</td>
<td>26</td>
<td>55</td>
<td>19</td>
<td>100</td>
<td>1.9</td>
</tr>
</tbody>
</table>
Donors’ beliefs as a motive to donate land

Table 4.5 presents selected belief items land trust administrators were asked to rate as to their perception of the land donors’ beliefs about giving land (Appendix IX, Questionnaire, question 39-43). The following are the mean scores to this group of questions which focuses predominately on the altruistic aspects of land donors’ beliefs:

1) expressed beliefs consistent with the land trust’s mission and its programs to which the donor had given, (mean = 2.9);
2) expressed a strong commitment to conservation and land stewardship (mean = 2.9);
3) sought to protect a certain type of landscape (e.g., scenic, pristine, wilderness, historical, or cultural), (mean = 2.7);
4) indicated they wanted to “give something to their community,” (mean = 2.3); and
5) felt their land donors’ land donation was for altruistic purposes, or “the joy of giving” (mean = 1.9).

The beliefs that the respondents’ donors perceived most important with respect to donating land were:

1) donors’ beliefs were consistent with the land trust’s mission/programs; and
2) the selected land trust, the donee, had demonstrated or expressed similar or as strong as a commitment to conservation and land stewardship principles as those of the land donor.

“Giving to the community,” and donating for “altruistic purposes” were belief items that did not rank as highly in relationship to the other beliefs as one would anticipate. Based on this data, the potential land donor’s beliefs that are “generally at one” or appear to coincide almost 100% with “the trust’s mission” tend to be represented at a higher mean value for this study. Similarly, this data tends to be reinforced in the remarks regarding donors’ beliefs and how they subsequently result in a donation as related by Lynette Pohlman, Director, Iowa State University Museums:

If they believe it, they give...the donor believes in the (museum’s) cause, belief or value system which must be the correct mission of the non-profit organization. This means the donee’s belief or value system must
be almost 100% parallel to the belief or value system of the donor’s 
(Appendix II, Researcher’s Interview Journal).

A correlation was calculated among the “belief questions”:

a) altruism and donors’ beliefs showed a measure of correlation of 0.40, significant at a 
level of 0.01; and

b) egoism and donors’ beliefs showed a correlation of 0.02, which is not significant.

Thus, it may be concluded there is not a significant relationship between egoism and the 
donors’ beliefs variable. Furthermore, since there is no “egoism-belief” relationship, the 
“belief” correlation with the altruism and egoism item shows it is only for altruism and not for 
egoism. The test further provides there is a significant relationship only between the belief 
variable and the altruistic motive. It could be concluded the stronger the respondents’ 
altruistic beliefs, the higher their altruistic motivational response to the 13 variables (questions 
19-32), and therefore, the land owner may have a tendency to be altruistically motivated to 
give land.

Comparing the correlation of altruistic and egoistic orientation with donors’ beliefs

Of the 104 respondents, 92 were able to be developed into a classification based on 
altruistic and egoistic motives. The altruistic and egoistic scales were categorized as low, 
medium, and high ranges. Theses ranges in turn were developed into a 3 x 3 array matrix

Table 4.6  Classification of respondents based on altruistic and egoistic motives

<table>
<thead>
<tr>
<th></th>
<th>Egoistic Motives</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Low</td>
</tr>
<tr>
<td></td>
<td>N</td>
</tr>
<tr>
<td>Altruistic Motives</td>
<td></td>
</tr>
<tr>
<td>Low</td>
<td>10</td>
</tr>
<tr>
<td>Medium</td>
<td>13</td>
</tr>
<tr>
<td>High</td>
<td>1</td>
</tr>
<tr>
<td>Total</td>
<td>24</td>
</tr>
</tbody>
</table>

N=92
comparing ranges of altruistic and egoistic motives for the 92 respondents. Table 4.6 relates the percent of respondents for each of the three ranges for each motive.

The matrix shows the correlation between altruistic and egoistic motives for matching low, medium, and high ranges. The following indicates the percent of respondents that correlate to a matched group pair with respect to altruistic and egoistic motives:

a) 42% respondents, low range group pair;
b) 49% respondents, medium range group pair; and
c) 39% respondents, high range group pair.

Where the high range of altruism coincides with the low range of egoism, there were 4% respondents. This represented the lowest percent of respondents of a group range with respect to the altruistic and egoistic motives. Where the low range of altruism coincides with the high range of egoism, there were 29% respondents. Where the medium range of altruism coincides with the low range of egoism, there were 54% respondents which was the highest of the groups.

What appears evident is that 40-50% of all respondents are in the matched pair ranges of altruistic and egoistic motives being indicative of a single positive relationship existing between the two scales of altruism and egoism. Expanding the research further would mean either acquiring more data and/or performing further statistical applications to include those results in the descriptive analysis of the ancillary motivational responses and characteristics of land donated.

Ancillary Motivational Responses of the Land Donors and Characteristics of the Land Donated

Regional distribution among land donors

Historically, settlement occurred earlier in certain regions of America than in others; thus a region's cultural and economic factors influenced the land tenure for that particular region of the country. Regions with historical post-European settlement of America tended to set a precedent for a greater number of land trusts and, hence, a greater number of respondents than
comparative regions. This is demonstrated in comparison of a previous survey conducted in 1990 by the Land Trust Alliance (Bacher, 1991) and the land trust administrators' responses from various regions in the U.S. as presented in the present study (Appendix IX, Questionnaire, question 1; and Appendix XI, question 1).

Land types held by a land trust

The land types held by land trusts reports "rural, woodland" ranked first with respondents indicating 51-75% of the land it held to be this type. The second largest land type held category was "rural, nonfarm." It resulted in 76% in the 26-50% category. Third, "rural, farm/ranch" with 55% also in the 26-50% category. The remaining land types in descending order were "rural, other," "suburban," and "urban" all in the 0-25% category. Urban lands held by a land trusts ranked last (Appendix IX, Questionnaire, question 2; and Appendix XI, question 2).

Land donors' community ties

Respondents indicated the approximate period of years their donors resided in their community prior to making their first land donation to a land trust and as a possible influence for being motivated to give land to a land trust (Appendix IX, Questionnaire, question 3). Fifty-four percent of the donors resided 21 years or more in their community when they made the decision to make their first land donation. The second largest group of respondents resided 16-20 years in their community prior to making their first donation which comprised 19% of the donors. Persons in the 11-15 years and 6-10 years periods of residence each reported 11%. Finally, the fifth residing period reported only a 5% response and to indicate the donors had resided 0-5 years in the community before making their first land donation to a land trust (Appendix XI, question 3).

Land donors that had their principal residence in the community where they first donated land

Another aspect of donors' community ties examined if the principal place of residence influenced the land owners' decision to make a first land donation (Appendix IX, Questionnaire, question 4). Slightly more than half of the respondents indicated that between
76-100% of their donors had their principal residence in the community where they made their first land donation. This was the highest percentage reported. Seventeen percent reported in the range of 51-75%, followed by 14% in the 26-50% category range. The second highest percentage was 20% reported for the 0-25% range (Appendix XI, question 4).

Assisting sources utilized by donors prior to making a land donation decision

Respondents noted land donors sought out a variety of sources prior to making a land donation decision (Appendix IX, Questionnaire, questions 5-18). A donor's previous knowledge of the land trust to which they made their donation, their legal counsel, and a land appraiser were the highest ranking assisting sources consulted by the land owners as perceived by the respondents. As an intermediate ranking, family members, other donors' familiarity with a land donation experience, nonprofit organizations, and tax advisors were the selected responses. Land professionals, public officials; and surprisingly, land donors' friends ranked as the least sought assisting source for advice in the land donation decision making process (Appendix XI, questions 5-18). A categorical percentage technique was used to measure to what degree the respondents perceived their donors favored utilizing a particular source to assist them prior to making a land donation decision.

Proportion of donors' land gifts as land protection mechanisms

A number of land protection mechanisms were used by the land donors. Respondents were asked about land protected through land fee simple and the donation of development rights through a conservation easement. Other interests in property were also included. The conservation easement and fee simple land gift types represented a nearly equal share for comprising each of the remaining portion of land gift types. While donations of a conservation easement or land fee simple may have seemed to be the most obvious and tangible land gifts, the land gift of other interest in property also represented an alternative means for land protection as well as self-benefiting tax deductibility. In turn, it would also appear to represent the owner's and the land trust's best interests. Knowing these mechanisms provided further insight as to what types of land gifts the owners donated to a land trust (Appendix XI, Ancillary Descriptive Analysis, questions 33-36).
Fair market value of land donations

The respondents indicated land donors' contributions in fair market value dollars for a period of 1990-1994. The fair market value reflected the monetary size of the land property donation—either fee simple or conservation easement—as accepted and reported by the land trusts' administrators for the surveyed land trusts during this period ( Appendix IX, question 37; and Appendix XI, Ancillary Descriptive Analysis, question 37).

Land gift trends

The present research indicated tendencies among land donors' types of land gifts over three five-year increment periods (Appendix IX, Questionnaire, questions 44-48). Respondents noted the number of acres donated as conservation easement, fee simple, or some other interest over the three 5-year periods. (Appendix XI, Ancillary Descriptive Analysis, questions 44-48). The trends in land gifts by donors for three 5-year periods from 1980-1994 contrasted the acre average for either conservation or fee simple donations. The continued increase in acre average donations from the 1980-84 period to the 1990-94 period may have been interpreted in the 1985-89 period due to a taxation influence, either for personnel income or federal estate tax incentives or for some other influence such as the subsidized agricultural land conservation programs or possibly incomplete land trust organizations' records. A summary comparison indicated during the last 5-year period, on average, for every fee simple acre donated 1.75 acres of conservation easement were also donated.

Land trust administrators' opinions about why land donors selected their land trust as the donee

Land trust administrators expressed their perspectives about their donor's opinions for giving land to a land trust through an open-ended question (Appendix IX, Questionnaire, question 49; and Appendix XI, Ancillary Descriptive Analysis, question 49). The land trust administrators' provided their perceptions as reasons their land donors selected their land trust as the donee:

1) reputation (37%);
2) competency (17%);
3) specialized land protection (17%);
4) quality of relationship between land donor and land trust (13%);
5) only land trust in existence (8%);
6) tax benefit (5%); and
7) nongovernmental preference (3%).

Political positions

A land donor's political ideology was measured as a consideration for influencing land giving beliefs towards making a land donation decision. These influences tended to reflect through a land donor's particular political association. Appendix XI, Ancillary Descriptive Analysis, question 50, provides a further discussion (Elazar, 1972). Overall, a middle-of-the-road political position tended to be indicative of most land donors nationwide as perceived by the land trust administrators. If there were other significant political views held by donors that may have influenced their motivation to donate property, they apparently remained as their privately held opinions.

Summary

Primary motivational responses

From the descriptive analysis perspective, it could be stated those land owners that have been motivated to donate land to a land trust have done so to protect it from other uses and to lessen one's federal estate tax burden. Beliefs of donors' for influencing them to make a decision to give land included those “whose views were compatible with the land trust's mission or stewardship programs.” Also, the land trust the land owner gave to had among its land donor-land trust relationships, the personal giving agenda of the land donor and their ideologies. However, it may seemingly be possible whatever the number of motivating elements acting upon the land donor, the astute land owner will make the decision to donate a conservation easement land fee simple after assessing all of the influences bearing the most important significant implication from the perspective of both altruistic and egoistic positions, or also, utilitarian and holistic views of ethical land-use (Beatley, 1994). The three “occurrence
groups" indicating a positive significant relationship between measures of altruism and egoism provides evidence that altogether, it may be entirely possible the decision to donate land will occur when the land donor believes both egoistic and altruistic motives can be optimally and equitably attainable and not at cross purposes to one another. These results support the idea that land owners donate land for reasons in addition to self-benefiting tax deductions and blocking unwanted development on one's property. Many land owners have a sense of community and belief in the mission of land trusts to provide land resources in an arable, cultural, and/or pristine state for future generations.

Ancillary motivational responses of the land donors and characteristics of the land donated

The data obtained on the characteristics of land donors and their land donations through the aforementioned questions indicated:

1) fifty-four percent of the land donors had resided in their community 21 years or more when they made their first land donation;
2) at least 49% of the respondents among 76-100% of the donors, indicated the land donors had made their first donation from the same community as their principal place of residence;
3) the preferred assistance sought by a land donor prior to making a land donation decision was:
   a) the land trust to which the donor is making the donation;
   b) the donor's legal counsel; or
   c) the land appraiser; and
4) conservation easement donations represented the largest land type gift in the average number of acres in the latest five year period of 1990-94.

Also, the present research indicates the land owner ranks the reputation of the land trust as a very important factor when deciding to donate land to a particular land trust. Additionally, it was shown land owners are strongly motivated by beliefs such as staff competency, and in land trusts who advocate specializing in particular land protection missions play a closely associated role in the land owners selection process. While the land owners' desire to protect land and receive
tax deductible benefits are generally regarded as the obviously visible motives causing a land owner to make a land donation decision, the respondents revealed there were nearly as equally as important motives that enter the land donation decision-making process. In retrospect, what set itself apart from the other responses was the emphasis donors' placed on the belief in what could be termed pre-donation relationship building. Viewed as a motive, this series of encounters acting together as one motive occurring between the land trust staff and the potential land donor brings a new insight to another facet of land donor motivation.

NOTES

1. Question 30, “the donor had an enjoyable relationship with the donee land trust” (mean = 3.8) appeared initially to have some merit. However, it was deemed that its intent in relationship to the other motivating influence items was not essential since the question could have possibly elicited a biased response. This is because in this situation the donor/donee professional relationship normally prohibits qualitative judgments to be made about those that have made gifts to their charitable nonprofit charitable conservation organization. Additionally, when two parties have entered into a land transaction from the basis of a mutually beneficial perspective, the relationship was generally compatible. This situation is considered the “but for condition” and, therefore, does not bear significance for motivational influence. Therefore, question 30 was deleted from further examination.
CHAPTER V
CONCLUSION

Introduction
This study was based on a survey designed to identify what motivates land owners to donate a conservation easement and/or their land fee simple to a land trust. A nationwide survey of 104 land trusts administrators was conducted to ascertain the attitudes and beliefs giving rise to the influences motivating land owners to donate land to land trusts. Data obtained from the land trust administrators’ perceptions and their accounts made it possible to identify the influences affecting this particular philanthropic event. This chapter presents the results of the study and recognizes the significance as well as the limitations of this research. Finally, recommendations for future study are presented.

Through the use of land trust administrators, the study attempted to determine what motivates land owners to give land donations. A questionnaire was used which asked the respondents to rate items related to their perceptions of the importance of possible land giving motivations (13 items) and the beliefs of land owners for donating land (5 items). The remaining questions included characteristics of the land owners and of the land donated.

Results
Responding land trust administrators provided their perceptions of their land donors’ motivations by answering the following questions:
1) Questions 19-32 dealt with the donors’ motivations for land donations; and
2) Questions 39-43 inquired about donors’ beliefs for making a land donation

The results of the analytical applications to these questions and a descriptive analysis accompanies these two question groups. This discussion is followed by a summary of the results of a descriptive analysis of the remaining survey questions.

The following represents the outcome of the analytical application applied to 13 types of possible motivations for land donations. It was found that a significant positive relationship
exists between measures of altruistic and egoistic motivational behavior found in land giving motives. Further, these measures of altruistic and egoistic motivational behavior for giving land are present in those land donor motive items that correlate positively with one another. The following land donor motive variables were identified as correlating positively with one another. What they may indicate are:

1. *Land containing regionally significant or important prime farmland,* (altruistic motive) correlated with *reduction of federal estate taxes* (egoistic motive) and *belief in the importance of their family's philanthropic activities* (egoistic motive).

These correlations indicate owners of regionally significant or prime farmland may be motivated to give land through the influence of the reduction of federal estate taxes, and their belief in the importance of their family's philanthropic activities.

2. *Knowing other land owners that had donated land* (altruistic motive) correlated with *reduction of federal estate taxes* (egoistic motive) and *belief in the importance of their family’s philanthropic activities,* (egoistic motive).

This correlation reveals land owners that knew of other land owners who had given land, and owned regionally significant or prime farm land correlates positively to the two previously stated egoistic motives of tax reduction and their family's philanthropic activities.

3. *Belief in the importance of their family’s philanthropic activities,* (egoistic motive) correlated with the altruistic motives of *the donor's land contained regionally significant or important prime farmland,* donor's belief in the influence of the donor's peers for donating land, and knew of other land donors that had donated land.

These correlations show their family’s philanthropic activities and peer influence play a significant role for motivating a land owner to donate land. The land owners’ fellow peers’ experiences and other significant information are most likely passed on to the land owner contemplating a land donation decision. It may be appropriate to say information such as the *belief in protection of regionally significant or important prime farmland,* belief in the influence of others, or the *knowledge of other donors having
donated land are all motivational elements possibly bound up in a peer information exchange motive which affects the land owner’s decision to donate land to a land trust.

These results strongly suggest a number of land owners believe in the protection of their regionally significant or prime agricultural farmland, and do so through the influence of the importance of their family’s philanthropic activities, and the opportunity to reduce their federal estate taxes. It also appears, peer influence and their family’s belief in philanthropic activities, may dominate altruistic and egoistic motives positively affecting land donors’ motivation in decision-making.

The descriptive analysis of the same 13 motives revealed four items having a mean score of 3.1 or greater on a five-point scale. These top four ranked mean score items appear to be expressing nearly the same perceived motivational influences for land donations as those findings that were positively correlated to an altruistic and egoistic orientation. The most highly favored motivational items included:

1) Question 31: Protecting the current land use status of the property (mean = 4.2);
2) Question 27: Achieving a personnel financial benefit through the land donation process (mean = 3.4);
3) Question 22: Preserving a family legacy (mean = 3.1); and
4) Question 32: Adapting to the favorable influence of others’ knowledge and experience regarding the land giving process (mean = 3.1).

As the analytical application on these 13 motives progressed, the motivational items, or questions 22 and 31, were omitted for statistical purposes from the development of scales. The remaining motivational items or questions 27 and 32, comprised part of the motivational items in the positive correlation of altruistic and egoistic orientation. The remaining nine motivational items had mean scores between 2.9 and 2.1. Interestingly, of the 13 motivational items, those receiving the least favored importance for a land owner to donate land and with the lowest mean scores were:

1) Question 20: Land contained cultural or historical sites/structures (mean = 2.3);
2) Question 29: The land owner was influenced by peers (mean = 2.1); and
3) Question 25: The reduction of state property taxes (mean = 1.9).

The descriptive analysis for questions 39-43 yielded the following results regarding donors’ beliefs as they relate to land donations. The beliefs perceived most important by land owners considering making a land donation were:

1) consistent with the land trust’s mission or program; and
2) compatible with the donee land trust expressing a strong commitment to conservation and land stewardship.

In the correlation test performed on this set of belief questions, it was concluded, while there was no significance among egoistic motive items, there was a significant relationship between the belief questions and the altruistic land donor motive items. Thus, it could be concluded that the stronger the respondents’ altruistic beliefs, the higher their altruistic motivational response to the 13 motivation variables, and, therefore, the land owner may have a tendency to be altruistically motivated to give land.

Summary

Primary motivational responses

From a descriptive analysis perspective, it could be stated that those land owners who have been motivated to donate land to a land trust have done so:

1) to protect it from other uses; and
2) to lessen one’s federal estate tax burden.

Donors’ beliefs for influencing them to make a land donation decision included:

1) the land owners views being compatible with the land trust’s mission; and
2) a strong commitment by the donee land trust organization to principles of conservation and land stewardship.

The results from the analytic applications of the descriptive analysis for these primary motives and beliefs tend to support the idea that land owners donate land for reasons in addition to self-benefiting tax deductibility and blocking unwanted development of their land.
Many land owners have a sense of community and belief in the land trusts to provide land resources in an arable, cultural, and/or pristine state for future generations. One should understand it may seem possible, whatever the number of motivating elements acting upon the land owner, that the astute donor will make a decision to donate a conservation easement and/or land fee simple after assessing all of the influences bearing the most significant implications from the perspective of combined altruistic and egoistic motives.

Ancillary motivational responses of the land donors and characteristics of the land donated

Results of the ancillary motivational responses of the land donors and characteristics of the land donated revealed: 1) length of time the donor resided in their community prior to making a land donation; and 2) many of the land donations come from land owners in the community of where the land owner resides may play a role in their decision to give land. In the five-year period of 1990-1994, the conservation easement represented the largest type of land gift in terms of average number of acres donated per respondent—2,834 acres (n=63). While “other interests in land gifts” play a significant role in protecting lands and benefiting a land owner’s estate, the advantageous of knowing how to use the conservation easement creatively to exact more options through the donors’ rights of property may be a motive for the land owner to donate land.

While not directly related to the primary motive for giving land, the present research indicates the land owners ranked the reputation of the land trust as a very important factor when deciding to donate land to a particular land trust. Additionally, it was shown land owners are strongly motivated by beliefs such as staff competency, and in those land trust organizations who advocate specializing in particular land protection missions play a closely associated role in the land owners’ selection process. What was revealed from these respondents was almost equally as important as knowing the motives affecting the land donation decision-making process. It could be stated that, as an influencing factor in the land giving process was the emphasis donors’ placed on the belief in relationship building between the land trust staff and the potential land owner as a motive occurring prior to the owner’s decision to give land.
Limitations

The study had two limitations. First, the land trust administrators or officers of the land trust organization were the selected respondents who represented the land donors. Thus, they did not “speak” for themselves and the data received was the land trust administrators’ perception of their land donors’ opinions for what motivates a land owner to give land. Secondly, lack of prior empirical precedent regarding motivational behavior for donating land as a philanthropic act resulted in a need for the present researcher to define measures of altruistic and egoistic motives of land giving based on authoritative definition of sources of altruism and egoism as these defined measures apply to philanthropy and are discussed in the literature review (Batson, 1991).

Through scale reliability testing it was shown scale reliability values were not high enough to continue to test for scales, and that the subsequent results would be meaningless. Therefore, a single measure of altruism and egoism would have to be determined by a “criteria of measure” determined by rational assessment or an argument for altruism or egoism. As an example, a group of individual land donors are asked to determine what each believes represents an altruistic or egoistic behavior for giving land. Each is asked to respond to a number of items and select which represent altruistic, egoistic, or combined forms of motivational behavior for land giving to a land trust. Under the circumstances, where the scales are not capable of being adequately developed, then this method of accepting the outcome on face validity becomes the measure of the event. However, because this was an exploratory study, these items were considered as gainful information about the nature of the present research, and that they were considered aspects that should be taken into consideration for continued research of this present research topic or similar topics for future research.

Significance

The study provides results which may have implications for: private land trusts or possibly other nonprofit conservation organizations, professional planners and landscape architects in academic institutions, public agencies, private practices, nonprofit conservation organizations, public officials, private land owners, estate planners, and legal advisors. As land
trusts gain their continued acceptance and appreciation, a knowledge of land donor motivation will be useful for persons who help others understand land owners' motives and assist them in estate planning. It will also help land donors to focus their philanthropic concerns towards protecting valued cultural and natural resources in perpetuity.

This research will contribute to the disciplines of landscape architecture and community and regional planning. Landscape architecture and community and regional planning are inherently multi-disciplinary, having portions of their academic origins in the social and natural resource sciences. The fields of social-psychology, land-use ethics, tax law, and philanthropy taken together in the context of this research study, contributes to the body of knowledge in both academic disciplines. Subsequently, the knowledge contributed through this process represents the examination of a concept that has received little; if any attention as a research study. This research will be meaningful not only to the academic disciplines represented by the present study, but to land trust administrators, philanthropic research institutions, local and regional government officials, and concerned citizens.

The information provided on the positive correlation occurrence groups could be a basis for developing a land donor motive personality profile (Prince and File, 1994). It is possible the creation of a land donor motive personality profile could lead to more valuable and larger donations, thereby increasing the protection of cultural and natural landscapes for the public good. As a hypothetical example, local governmental planning officials and land trust administrators would venture their resources, directing them towards developing a land donor motivational profile. This profile would provide a framework to identify potential land donors' properties that qualify as a land donation. Land owners and the land trust could become more aware of a property's potential as a land donation. When a knowledgeable land owner decides to donate property, the local land trust would be most likely considered as the recipient (Wright 1994, 382-389).

Overall, this type of profile lays the ground work that eventually leads to a data base of private land owners' property containing cultural and/or natural landscapes that potentially need to be protected (Crow, 1995). A local planning authority that has access to a data base inventory for sensitive land parcels whose owner may wish to donate would be a valuable
complement to a community’s open space plan in conjunction with on-going development. Where local planning entities are sensitive to potential land donors, the land trust may—with the land owner’s permission—inform local planning and government officials about these lands that lend themselves to open space, growth management, and comprehensive plans, policies, and programs (Russell, 1995). Through this exchange of land resource data and ideas, the protection starting with watersheds and scenic vistas to prime arable lands and historic sites can be further integrated into an open-space recreation or a resource sustainability plan, as well as public education programs.

**Recommendations**

This research initiates an understanding for land donor motivation. Through the literature review, the survey responses, and the examination of other topics it became obvious there is an opportunity for further exploration. The following items need to be given further consideration if a similar study were to be repeated or if individual topics were to be identified for more specific research:

1. Design a new survey to include a number of techniques to obtain the most accurate data with the greatest response rate from the land donors, either directly or indirectly. The survey should consist of all or part of these methods: interview, mailed survey, group discussions, and secondary sources.

2. Determine if measures of altruism and egoism solely for land donor motivation have been previously research.

3. Repeat the present or a new survey adapting it to a particular region’s. This would allow for more questions to be adapted to local and/or regional influences particular to the potential land donors as compared to this present study’s national questionnaire.

4. Develop a land donor motive profile following modifications to this survey questionnaire and/or selection of other survey instruments as suggested in item
5. Questions for further consideration may include:

a. Determining differences and similarities between donors of land and another type of nonprofit conservation organization (e.g., The Nature Conservancy, American Farmland Trust, or National Audubon Society) as compared to a private land trust.

b. Knowing the influences affecting the intergenerational wealth shift of privately held lands for consideration to be donated to land trusts.

c. Determining if varying degrees of altruism and/or egoism can differentiated in the land donor's motive to give land through the type of land gift donated, e.g., conservation easement, land fee simple, or other interests in property.

d. Comparing and then relating the findings of Clary and Snyders' model on volunteerism to altruistic and egoistic motivational behavior of those land owners who have donated land to a land trust (Burlingame, 1993).

e. Examining land donors' ethics and cultural values as the precursor to a land giving motive (Beatley, 1994; Caldwell and Schrader-Frechette, 1993; Tuan, 1974).

f. Investigating the differences in the perceptions of the importance for land donation philanthropy versus other philanthropic causes.

g. Examining how the fostering of prosocial behavior motivates a person to act favorably towards the natural environment and society (Burlingame, 1993).

h. Investigating the considerations for land donor motivation through the phenomenon of political culture as influenced by the spatial patterns of where one lives and their integral values and attitudes (Elazar, 1972).

i. Determining the role landscape aesthetic preference plays as motive for donating land (Callicott, 1989).

j. Considering transcended place, or topophilia—the individual's need to be
psychologically attached to the land—and how it affects the land donors' decision to give land as a means to protect property (Tuan, 1974).

k. Measuring the economic benefits for the public good through the philanthropic act of donating land (Ostrander and Schervish, 1990).

l. Analyzing the relationship between the necessity to protect sensitive lands through a land trust versus the implications of downtown urban redevelopment and suburban growth have on the non-developed lands at the edge of a metropolitan region.

**Final Remarks**

Land owner motives for donating land may occur as operating through a synergistic combination of egoistic and altruistic influences, and not as much through a continuum of nearly distinct entities. The evidence of land donors' strong altruistic beliefs should be considered as proof that land owners do “care about causes and benefiting others.” However, it may be possible land donors' beliefs do not always coincide or appear identical to their motives. Therefore, most land donors' decisions to give land will be motivated by egoistic concerns and influences. From the data, there exists a possibility to infer a land owner's motivations for giving land will most likely occur when egoistic influences and beliefs of altruism are most apt to coincide about a particular motive (Margolis, 1982). This notion warrants further research about the observation: those land donors expressing an egoistic motive in their desire to gain or control property, yet through their beliefs and deeds of altruism, they wish to be perceived by others as expressing an altruistic act or a “community good” deed (Dewey, 1978; Margolis, 1982).

A sensitive understanding of the motivating influences involved in a land donation will make the land trust more effective as a nonprofit conservation organization for land protection as well as a reputable philanthropic vehicle for those that wish to return something to the community. Land trusts, the land donors, and their supporting membership acting at a “grass-roots” level with community, city, state, and national governments have the opportunity to
shape land-use policies along with a community's well-articulated vision for its cultural and natural resources legacy. This effectiveness of volunteerism becomes invaluable to the enhancement of a community's future. It can be concluded that donating land to a land trust represents a philanthropic act. As Burlingame states: "Philanthropy is best described and understood when its definition takes into consideration concepts that include both the interest of self and the interest of others. Or as Tocqueville so elegantly defined it, "Self-interest rightly understood" (Burlingame 1993, 8).

NOTES
1. Elazar's work on political culture is a phenomenon indicative of where one lives in the United States influenced by their spatial patterns along with their integral values and attitudes. These differences in political culture can be used to create regional variations in the perception of ethical land use. What is considered appropriate and acceptable land use in one region, may not be in another. Knowing this—instead of asking for a land donor's political preference as being middle-of-the-road, liberal, and/or conservative, the better question would have followed Elazar's three primary political cultural distinctions: 1) individualistic, 2) moralistic, and 3) traditionalistic (Beatley 1994).
BIBLIOGRAPHY


ACKNOWLEDGEMENTS

Achieving a masters degree in two disciplines simultaneously represents a high standard of scholarly achievement demonstrating a commitment to attaining a level of higher learning, and the appreciation for the how these two disciplines compliment one another.

As I complete my thesis, there are many to who I am indebted. Although not all are thanked here individually, I hope those individuals will know that I recall and value their keen interest, able assistance, ad collegial friendship. This is especially true for all the people who shared their guiding assistance as I conducted my literature review; the land trust professionals throughout the United States who assisted in the development of the questionnaire; and the 104 land trust administrators across the United States who participated as survey respondents.

A special gratitude of thanks goes to Dr. Gordon L. Bultena for his detailed attention and help in developing the research questions and designing an effective questionnaire instrument. His understanding and assistance were immeasurable as the research methodology materialized. In producing the actual questionnaire and placing it into the hands of the respondent, gratitude is expressed to Nancy J. Qvale whose desktop publishing resources made it a reality. Also assisting me in my research was Nora Martinez Ladjahasan, whose attention to my survey data and statistical abilities added a level of efficiency and skill to this process for which I am most grateful. Similarly, a debt of gratitude is extended to Dr. Timothy O. Borich whose assistance was also valuable in reviewing the questionnaire and in the final phases of the survey and the research methodology. I also thank Anthony C. Stevens for his generously buoyant statistical commentary in the final phases of the thesis.

Throughout my graduate school endeavors at Iowa State University, a number of professionals have provided encouragement through their assistance and genuine interest in my research. These individuals are; my good friend, Jack E. Leaman, FASLA, AICP Adjunct Professor in Community and Regional Planning, Iowa State University, Consulting Planner and Landscape Architect; Dr. Thomas L. Daniels, AICP, Executive Director, Lancaster County
Agricultural Preserve Board; and Mark C. Akleson, President, Iowa Natural Heritage Foundation.

A thank you goes to the Vermont Law School’s instructors and fellow classmates of the Conservation Land Trust Class, Summer Session 1993 for providing a rare and excellent opportunity to achieve an academic insight to land trusts; the research staffs’ of the Land Trust Alliance’s national office for guidance on conservation easements and land trust organizations’ activities, and Indiana University’s Center on Philanthropy for providing their support on the current literature in philanthropy.

In the final phases of the thesis, two person’s skills and abilities were invaluable for making the thesis the final product. I thank Lynn Ekblad for her diligent hours assisting with the desktop publishing and graphic design of my thesis. I also thank Patricia Hahn for editing my thesis—her skills and energy cannot be left unnoticed.

Choosing one’s Program of Study Committee is a task not to taken lightly—particularly in this case when the thesis represents a double masters degree. I am grateful to the professors I selected to serve on my committee. Each was selected for their ability to contribute to my thesis topic. Dr. Gordon L. Bultena, Professor in the Department of Rural Sociology, was the third member of my committee from outside my two major departments and representing expertise in survey design and evaluation. I thank Dr. Norman L. Dietrich representing the Department Landscape Architecture, who is an expert in regional landscape planning and research management—your reflective academic conversations full of advice and good cheer were appreciated. Finally, the Chair of my committee, Dr. Eric Damian Kelly representing the Department of Community and Regional Planning, and an expert in growth management and land-use planning law—I thank you for encouraging me to take on the challenge of an unknown research topic. It has been a memorable to experience to look beyond conventional ideas and to attempt to shed new light on my respective professions’ body of knowledge!

With gratitude, I thank the members of my family, my close friends and professional colleagues for their support in the wonderment of my choosing to obtain a double masters degree after 25 years of experience as a landscape architect—I say try it . . . learning keeps one’s spirit youthful!
The Roper Center survey of private grantmaking foundations reported on their creation and growth. It also included motivational information (Borris 1987, 65). The researcher observed parallels between the Roper Center survey's objectives and its relationship to the land donor motivation questions. This was evident in the portion on the motivation results of this survey that helped substantiate and re-enforce the type of questions the researcher had developed independent from the Roper findings (Borris 1987, 78). There were twenty motivations identified in the study for forming foundations. Personal philosophy, systematic giving, and welfare of others ranked 1 though 4, while social pressures, political beliefs, and control of business assets ranked 18 through 20. Other concerns such as tax benefits, geographic community, and lack of heirs placed in the mid to lower rankings. (Boris 1987, 79).

### Degree of Influence of Motivations for Establishing a Foundation

All Respondents (Weighted Data)

<table>
<thead>
<tr>
<th>Motivation</th>
<th>None (1)</th>
<th>Some (2)</th>
<th>Strong (3)</th>
<th>Total %</th>
<th>Mean</th>
<th>Rank</th>
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<tr>
<td>Personal philosophy</td>
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<td>6</td>
<td>20</td>
<td>23</td>
<td>42</td>
<td>100</td>
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<tr>
<td>Systematic giving</td>
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<td>3</td>
<td>23</td>
<td>27</td>
<td>34</td>
<td>100</td>
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<tr>
<td>Welfare of others</td>
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<td>6</td>
<td>28</td>
<td>25</td>
<td>31</td>
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</tr>
<tr>
<td>Social responsibility</td>
<td>11</td>
<td>12</td>
<td>27</td>
<td>27</td>
<td>27</td>
<td>100</td>
</tr>
<tr>
<td>Flexibility of foundation</td>
<td>18</td>
<td>8</td>
<td>29</td>
<td>21</td>
<td>25</td>
<td>100</td>
</tr>
<tr>
<td>Tax incentives</td>
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<td>12</td>
<td>24</td>
<td>22</td>
<td>21</td>
<td>100</td>
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<tr>
<td>Personal satisfaction</td>
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<td>14</td>
<td>29</td>
<td>14</td>
<td>21</td>
<td>100</td>
</tr>
<tr>
<td>Religious heritage</td>
<td>34</td>
<td>13</td>
<td>16</td>
<td>8</td>
<td>28</td>
<td>100</td>
</tr>
<tr>
<td>Family tradition</td>
<td>35</td>
<td>8</td>
<td>22</td>
<td>12</td>
<td>23</td>
<td>100</td>
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<tr>
<td>Particular activities</td>
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<td>9</td>
<td>21</td>
<td>15</td>
<td>20</td>
<td>100</td>
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<td>Geographic community</td>
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<td>26</td>
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<td>20</td>
<td>100</td>
</tr>
<tr>
<td>Help particular subgroups</td>
<td>42</td>
<td>16</td>
<td>14</td>
<td>15</td>
<td>13</td>
<td>100</td>
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<tr>
<td>Repay society</td>
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<td>13</td>
<td>21</td>
<td>13</td>
<td>11</td>
<td>100</td>
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<tr>
<td>Create family institution</td>
<td>46</td>
<td>12</td>
<td>18</td>
<td>9</td>
<td>15</td>
<td>100</td>
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<tr>
<td>Experience for children</td>
<td>57</td>
<td>9</td>
<td>19</td>
<td>6</td>
<td>10</td>
<td>100</td>
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<tr>
<td>Lack of heirs</td>
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<td>6</td>
<td>11</td>
<td>10</td>
<td>11</td>
<td>100</td>
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<tr>
<td>Memorial to self</td>
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<td>14</td>
<td>14</td>
<td>3</td>
<td>7</td>
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<td>Social pressures</td>
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<td>6</td>
<td>6</td>
<td>2</td>
<td>1</td>
<td>100</td>
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<td>Political beliefs</td>
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<td>2</td>
<td>8</td>
<td>0</td>
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<td>100</td>
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<td>Control business assets</td>
<td>93</td>
<td>4</td>
<td>2</td>
<td>1</td>
<td>1</td>
<td>100</td>
</tr>
</tbody>
</table>

Source: Boris 1987, 79.
APPENDIX II

RESEARCHER'S INTERVIEW JOURNAL
For the purpose of seeking previous research on land donor motivation, the following sources were contacted by the researcher prior to developing the literature and sources for the thesis. They were asked if they knew of any works that would assist the researcher in laying the groundwork for “the motivation of land owners to give property to land trusts”. This is a journal of these conversations.

<table>
<thead>
<tr>
<th>Contacted Source</th>
<th>Date Contacted</th>
<th>Organization</th>
<th>Comments/Results/Further Directions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Daniels, Thomas L., Director,</td>
<td>11.24.92</td>
<td>Agricultural Preserve Board of Lancaster County</td>
<td>Provided a brief overview of the mission of his board and his responsibilities. Suggested literature sources: Saving America’s Countryside, Sam Stokes and Land Saving Action edited by Russell Brenneman and Sarah M. Bates. Provided a copy of the paper he presented at American Collegiate Schools of Planning Conference, October 30, 1992, Ohio State University, Columbus, Ohio, Managing the Monster: Land Trusts as a Community Development Tool.</td>
</tr>
<tr>
<td>717.299.8355</td>
<td></td>
<td>P.O.B. 3480-50 North Duke Street Lancaster, PA 17603</td>
<td></td>
</tr>
<tr>
<td>Richardson, Elizabeth H.,</td>
<td>01.07.93</td>
<td>Colorado Open Lands 555 D.T.C. Parkway Suite C-2050</td>
<td>Provided a paper on open lands: “The Value of Land Adjacent to Open Space and a Review of Relevant Literature,” by Adam Shaw with Elizabeth Richardson.</td>
</tr>
<tr>
<td>Operations Manager, 303.694.4994</td>
<td></td>
<td>Englewood, CO 80111</td>
<td></td>
</tr>
</tbody>
</table>
Carbin, Richard W.,
President,
802.234.6444

The Countryside Institute
P.O.B. 1102
Barnard, VT 05031

Mr. Carbin former president and founder of the Ottauquechee Land Trust, provided historical insight on the beginnings of land trusts. Thought thesis very original. Suggested contacting Wesley Ward, Director, Land Conservation Center, The Trustees of Reservations, or Gordon Abbott, Jr. who wrote Saving Special Places, a book on the centennial history of The Trustees of Reservations. Located in Beverly, MA. Information acquired through a meeting with Mr. Carbin. He was a guest lecturer to course I was studying on Conservation Land Trusts while attending Vermont Law School. Summer, 1993

Ward, Wesley T.,
Director,
508.921.1944

Conservation Center the Trustees of Reservations 572 Essex Street
Beverly, MA 01915

Interviewed Mr. Ward by telephone. Discussed the Land historical beginnings of TOR. Recommended acquiring Abbott's book on Trustees of Reservations researcher did so. Realizing the researcher was a landscape architect, he was quick to point out that TOR was founded by Charles Eliot. TOR was founded in 1891 and served as the model for Great Britain's National Trust.
<table>
<thead>
<tr>
<th>Name</th>
<th>Contact Information</th>
<th>Date</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Steen, Peter</td>
<td>President, Lyme</td>
<td>09.15.93</td>
<td>Lyme Timber Company, P.O.B. 266 Lyme, NH 03768 Suggested reviewing the book, The Good Dirt, by David Morieu, former president of the Nature Conservancy for 23 years. Also, Gordon Abbott of The Trustees of Reservations, Beverly, MA., and Stephen J. Small, Director, Landowner Planning Center, Boston, MA. Committed that the topic is interesting. Had not seen anything published on it.</td>
</tr>
<tr>
<td>McCarthy, Kathleen D.</td>
<td>Director,</td>
<td>09.28.93</td>
<td>Center for The Study of Philanthropy The Graduate School &amp; University Center City University 33 W. 42nd St., 1525 GB NYC, NY 10036 Ms. McCarthy mailed a listing of research papers dedicated to the study philanthropy-mailed to researcher May 4, 1994 stating, “The Center does not currently house information on giving patterns in real estate.” Recommended America’s Wealthy and the Future of Foundations, edited by Teresa Odendahl with the Council on Foundations and the Yale University Program on Non-Profit Organizations, 1987. Also, by same author; Wealthy Donors of NY and Their Charitable Attitudes, 1987.</td>
</tr>
</tbody>
</table>
Herrod, Kate, Planned Giving Director, 703.841.5351

10.08.93

The Nature Conservancy
1815 N. Lynn Street
Arlington, VA 22209

Knew of no published information applicable to the researcher's topic. Commenting on the attitude of donors to the Nature Conservancy; donors believe in 1) give money in proportion as to what feels good to them, 2) lasting benefit, 3) the existing non-profit organization, 4) the mission of the Nature Conservancy, and 4) the Nature Conservancy's financial stability. The donor theory is, "those that give most, receive most." The Nature Conservancy's fundamental mission: acquire lands with endangered species and biological diversity to protect the particular species. They focus primarily on buying conservation easements.

Johannes, Jim, Professor, 608.263.1254

10.26.93

U. of Wisconsin, Madison School of Business

Professor Johannes stated, “Charitable giving could be viewed by the business community as a species of capital assets.”

Smith, Hayden, Ph.D., Visiting Scholar, 212.620.4230

10.26.93

The Yale Program on Non-Profit Organizations, University of Connecticut P.O.B. 20853 New Haven, CT 06520

Suggested contacting Indiana University's Center on Philanthropy at the joint campus of Indiana and Purdue Universities. Also, recommended the latest books by Teresa Odendahl-Charity Begins at Home and America's Wealthy and The Future of Foundations and works by Francie Ostrower. Acknowledged the thesis should provide some interesting results.

Huttner, Janet S., Professor, American Studies & Bibliographer, 317.274.4206

10.29.93

Center on Philanthropy Indiana University 550 W. North St., Ste 301 Indianapolis, IN 46202

Guided to James Jackson Griffith, Ill's, dissertation Economic Motives for Contributing to the Nature Conservancy, North Carolina State University at Raleigh, 1984. Researcher acknowledged thesis topic as interesting, but knew of nothing that had been researched on land donor motivation. Suggested reviewing two books by Robert H. Bremner; American Philanthropy & Giving
| Renz, Loren,  
| Vice-President Research,  
| 212.620.4230  
| 10.29.93  
| The Foundation Center  
| New York City, NY  
| Admitted they had nothing relating specifically to this topic. Reviewed to the Philanthropic Studies Index (PSI), Literature of the Non-profit Sector. The center charges $100 to do a document search for the researcher's topic. Researcher was able to receive the PSI through the interlibrary loan at ISU Parks Library. |
| Watson, Robert C.,  
| Development Officer,  
| 515.294.6577  
| 10.29.93  
| Iowa State University Foundation, Alumni Suite, Memorial Union, Iowa State University Ames, IA 50011  
| Refereed to a recent study by the National Committee on Planned Giving. “Planned Giving in the United States: A Survey of Donors” by Bruce E Bigelow and Scott R. Lumpkin, NCPG, 310 North Alabama, Suite 210, Indianapolis, IN 46204-2103, 1993. Obtained copy of the study which proved helpful for designing the questionnaire. |
| Small, Stephen J.,  
| Attorney at Law,  
| 617.357.4012  
| 05.27.94  
| Law Office of Stephen J. Small, Esq.  
| 75 Federal Street  
| Boston, MA 02110-1911  
| Concurred with the notion of discussing the thesis topic-particularly easement donation. Later proved helpful in reviewing the pre-test questionnaire booklet. |
| Pohlman, Lynette Lea,  
| Director of University Museums,  
| 515.294.3342  
| 07.20.94  
| Brunnier Gallery  
| 290 Schemann  
| Iowa State University Ames, IA 50011  
| Researcher asked, “What are some of the similarities between museum donors and land donors?” From her 20-plus years experience with the ISU museums she summarized the reasons for giving in priority from most to least important. The donor will give for:  
| 1. The sense of joy and satisfaction received from the donation act.  
| 2. If they believe in it, they give. The donor believes in the museum's cause (or the land trusts) belief or value system which must be the correct mission of the non-profit organization. This generally |
(Pohlman, continued)

1. **Means the donor's (the museum or land trust) belief or value system must be almost 100% parallel to the belief or value system of the donor's.**

2. **The donor really likes the people they have to meet prior to any mention of gift donations.** This includes the programs director, the education director, all the way to the planned giving officer. The donor takes into account how they were made to feel about themselves and the program.

3. **The non-profit organization (the land trust) can be trusted as a “safe haven,” a repository of entrustment for their “valuables.”**

4. **Their gift is a tax benefit to the donor. But keep in mind there are other choices that can be just as beneficial from a tax deductable perspective as their donation to your cause.**

5. **People give what they can give most easily, do without, or is not an inconvenience. For example: land, artifacts, real estate, collectibles, and cash.**

6. **If the donor is satisfied with the giving process, particularly in the initial phases of donor-done relationship, and with the organization; then they (the donors) begin to look upon their gifts (land donations) as an investment.**
Murray M. Blackwelder, 12.08.94
President,
515.294.4077

The Iowa State University Foundation
Alumni Suite, Memorial Union
2229 West Lincoln Way
Ames, IA 50014-7164


Batson, C. Daniel, 03.03.95
Professor,
913.864.4131

Department of Psychology,
University of Kansas,
Lawrence, KS
66046-2160

Suggested that since pathic emotions exist between people and animals, then it would seem possible to ask if people have pathic emotions for inanimate objects. Posited that this could begin to explain the environmental concerns we have; "love your mother" can be extended to loving "the mother earth." And, "why caring for the land?" If people are part of a community with civic concerns, and people depend on the land for their livelihood, then land is part of the community. Thus, it is possible for the people to extend their concerns to the land, which in turn translates to civic environmental groups protecting special lands that are part of their community. Batson authored The Altruism Question. His book deals with the altruism-egoism relationships between people.
APPENDIX III

HUMAN SUBJECTS REVIEW COMMITTEE APPLICATION
Memorandum

October 20, 1994

To: Joyce Joens, Secretary
   Human Subjects Review Committee
   203 Beardshear Hall
   Graduate College; Thesis Office

From: Stephen Wesley Goltry
   College of Design
   Graduate Candidate; MLA/MCRP

Ref: HSRC Application

Please find attached for committee review and approval:

1. 1 copy of the signed original application
2. 8 photocopies of the signed original application
3. 9 photocopies of accompany material
   (questionnaire booklet, cover letter, and follow-up reminder postcard)

The application form and questionnaire have been reviewed by members of my thesis committee.

If you have any questions, please call. Otherwise, I look forward to hearing from as soon as possible.

Thank you.
Information for Review of Research Involving Human Subjects
Iowa State University
(Please type and use the attached instructions for completing this form)

1. Title of Project: Land Donor Motivation Study

2. I agree to provide the proper surveillance of this project to ensure that the rights and welfare of the human subjects are protected. I will report any adverse reactions to the committee. Additions to or changes in research procedures after the project has been approved will be submitted to the committee for review. I agree to request renewal of approval for any review extending one year.

Stephen Wesley Coltry
Type of Principal Investigator: Research Coordination
Department: Landscape Architecture
Signature of Principal Investigator: Stephen Wesley Coltry
Campus Telephone: 294-3415

3. Signatures of other investigators

N/A

Date: __________

Relationship to Principal Investigator: __________

4. Principal Investigator(s) (check all that apply)
   ☐ Faculty  ☐ Staff  ☐ Graduate Student  ☐ Undergraduate Student

5. Project (check all that apply)
   ☐ Research  ☐ Thesis or dissertation  ☐ Class project  ☐ Independent Study (490, 590, Honors projects)

6. Number of subjects (complete all that apply)
   120. # Adults, non-students  ☐ # ISU student  ☐ # minors under 14  ☐ other (explain)

   * Executive Directors of Land Trusts throughout the United States

7. Brief description of proposed research involving human subjects: (See instructions, Item 7. Use an additional page if needed.)

   SEE ATTACHED

   (Please do not send research, thesis, or dissertation proposals.)

8. Informed Consent: ☐ Signed informed consent will be obtained. (Attach a copy of your form.)
   ☒ Modified informed consent will be obtained. (See instructions, Item 8.)
   ☐ Not applicable to this project.
9. Confidentiality of Data: Describe below the methods to be used to ensure the confidentiality of data obtained. (See instructions, item 9.)

SEE ATTACHED

10. What risks or discomfort will be part of the study? Will subjects in the research be placed at risk or incur discomfort? Describe any risks to the subjects and precautions that will be taken to minimize them. (The concept of risk goes beyond physical risk and includes risks to subjects' dignity and self-respect as well as psychological or emotional risk. See instructions, item 10.)

There are no risks, discomforts, or potential for social injury to the subjects participating in this research.

11. CHECK ALL of the following that apply to your research:
   - A. Medical clearance necessary before subjects can participate
   - B. Samples (Blood, tissue, etc.) from subjects
   - C. Administration of substances (foods, drugs, etc.) to subjects
   - D. Physical exercise or conditioning for subjects
   - E. Deception of subjects
   - F. Subjects under 14 years of age and/or □ Subjects 14 - 17 years of age
   - G. Subjects in institutions (nurinng homes, prisons, etc.)
   - H. Research must be approved by another institution or agency (Attach letters of approval)

If you checked any of the items in 11, please complete the following in the space below (include any attachments):

Items A - D: Describe the procedures and note the safety precautions being taken.

Item E: Describe how subjects will be deceived; justify the deception; indicate the debriefing procedure, including the timing and information to be presented to subjects.

Item F: For subjects under the age of 14, indicate how informed consent from parents or legally authorized representatives as well as from subjects will be obtained.

Items G & H: Specify the agency or institution that must approve the project. If subjects in any outside agency or institution are involved, approval must be obtained prior to beginning the research, and the letter of approval should be filed.
Checklist for Attachments and Time Schedule

The following are attached (please check):

12. ☑ Letter or written statement to subjects indicating clearly:
   a) purpose of the research
   b) the use of any identifier codes (names, #s), how they will be used, and when they will be
      removed (see Item 17)
   c) an estimate of time needed for participation in the research and the place
   d) if applicable, location of the research activity
   e) how you will ensure confidentiality
   f) in a longitudinal study, note when and how you will contact subjects later
   g) participation is voluntary; nonparticipation will not affect evaluations of the subject

13. ☐ Consent form (if applicable)

14. ☐ Letter of approval for research from cooperating organizations or institutions (if applicable)

15. ☑ Data-gathering instruments

16. Anticipated dates for contact with subjects:
   First Contact: October 24, 1994
   Last Contact: November 28, 1994

17. If applicable: anticipated date that identifiers will be removed from completed survey instruments and/or audio or visual
tapes will be erased:
   January 31, 1995

18. Signature of Departmental Executive Officer: CRD

19. Decision of the University Human Subjects Review Committee:
   ☑ Project Approved  ☐ Project Not Approved  ☐ No Action Required

   Patricia M. Keith  [Signature]
   Name of Committee Chairperson
   Date: 11/27/94
   Signature of Committee Chairperson

GC: 1/90
7. a) The problem to be examined:
   This problem examines the motivation of land donors to bestow conservation easements and donate their property to a land trust.

b) Method for selecting subjects:
   The subjects to be surveyed will be the executive directors of land trusts (non-profit conservation organizations) throughout the United States, primarily in metropolitan growth regions. Individual land donors will not be surveyed due to time and financial resource limitations. In this research, the executive directors of the land trusts are asked to answer a mailed survey about their land donors. These donors are not identified by name.

c) Data gathering survey instruments:
   A sample copy of the survey questionnaire and cover letter are attached. They have been reviewed by my thesis committee.

8. 1. Research procedure is a mailed questionnaire.
   2. There will be no risks or discomfort to the subjects.
   3. The benefit to be expected in this research is that land trusts will have a profile of potential land donors.
   4. N/A
   5. & 6. Subject may inquire about the survey if they wish. It is their free choice to discontinue participation at any time.
   7. Cover letter informs subject of confidentiality.
   8. Cover letter informs subject of time required to complete the questionnaire.

9. Personal identifiers:
   To insure confidentiality, each questionnaire has an identification number for tracking purposes. The cover letter states, "your name, or your land trust's name will not be placed on the questionnaire, nor will information be reported in a manner in which your organization could be identified."
Your name was selected from the Land Trust Alliance's national membership directory to assist in a study about land donor motivation. As an administrator for «Trust», you are undoubtedly knowledgeable about your land donor's giving patterns, as well as their property and conservation easement records. The information that you and others provide will be used to develop a profile of land donors. This profile should aid in the identification of potential land donors. The study's findings also should be helpful to land trusts in effectively pursuing their mission through well-coordinated relationships with local area land owners and land use planning officials.

Please familiarize yourself with the questionnaire before responding. It should take you about a half hour to complete. The questionnaire has an identification number for tracking purposes, but your responses will be kept strictly confidential. Your name, or your land trust's name, will not be placed on the questionnaire, nor will information be reported in a manner in which your organization could be identified.

This study is being conducted under the auspices of the Department of Landscape Architecture and the Department of Community and Regional Planning at Iowa State University. The data collection is for a thesis and your participation is voluntary. If you have any questions about this study, please contact me at (515) 294-8959 or (515) 294-3415.

Please return this questionnaire by Wednesday, November 30, 1994. Your participation in this survey is important to our understanding of land donor motivations and, ultimately to the success of protecting special lands! Findings of the survey will be available at your request.

Thank you for your assistance.

Sincerely,

Stephen Wesley Goltry
Study Director
Land Donor Motivation Study

Encl.: 1 questionnaire booklet with return envelope
RE: Land Donor Motivation Study

About two weeks ago a questionnaire was mailed to you regarding land donor motivation. As of today, we have not yet received your completed questionnaire. If you have recently completed the questionnaire and it is in the mail, thank you very much for your assistance. If you have not yet been able to complete it, please do so as soon as possible.

We are conducting this study because we feel it is important to understand the motivations of land donors. In order to obtain accurate and useful information, we need to gather responses from as many informed persons as possible.

If you are no longer the director for your land trust, have misplaced your questionnaire, or did not receive one in the first place, please contact us immediately. Call us at (515) 294-8959 or (515) 294-3415, or write to us c/o Department of Regional and Community Planning, 126 College of Design, Iowa State University, Ames, Iowa 50011-3095. Thank you.

Stephen Wesley Goltry, Study Director
These notes provide further information regarding tax regulations as an incentive for potential land donors.

Note 1.

Regarding Section 170 (h) and Treasury Regulation 1.170A-14, the following conditions, characteristic or pertinent to a potential donor's property, may be considered as "a rule of thumb" assessment for pre-determining if one's land meets the "conservation purposes" test.

1) The more significant the land is the more it adds to the public good, and the more likely the land owner qualifies for a deduction;
2) Protecting a large tract of primarily undeveloped property, such as ranch or farm land;
3) Smaller parcels with scenic and open space qualities;
4) Protecting a scenic view in an area or highway corridor from potential development;
5) Greenbelt establishment and preservation in an urban area;
6) Natural resource (i.e. watershed) protection that is scenic and essential for community water supplies; and
7) Protection of historic properties (Small 1992, 17).

Internal Revenue Code §170(h)

Sec. 170(h) Qualified conservation contribution.—
(1) In general.—For purposes of subsection (f)(3)(B)(ii), the term "qualified conservation contribution" means a contribution—
(A) of a qualified real property interest,
(B) to a qualified organization,
(C) exclusively for conservation purposes.

(2) Qualified real interest property.—For purposes of this subsection, the term "qualified real property interest" means any of the following interests in real property:
(A) the entire interest of the donor other than a qualified mineral interest,
(B) a remainder interest, and
(C) a restriction (granted in perpetuity) on the use which may be made of the real property.

(3) Qualified organization.—For purposes of paragraph (1), the term "qualified organization" means an organization which—
(A) is described in clause (v) or (vi) of subsection (b)(1)(A), or
(B) is described in section 501(c)(3) and—
(i) meets the requirements of section 509(a)(2), or
(ii) meets the requirements of section 509(a)(3) and is controlled by an organization described in subparagraph (A) or in clause (i) of this paragraph.
(4) Conservation purpose defined.—

(A) In general.—For purposes of this subsection, the term “conservation purpose” means—

(i) the preservation of land areas for outdoor recreation by, or the education of, the general public,

(ii) the protection of relatively natural habitat of fish, wildlife, or plants, or similar ecosystem,

(iii) the preservation of open space (including farmland and forest land) where such preservation is—

(I) for the scenic enjoyment of the general public, or

(II)pursuant to a clearly delineated Federal, State, or local government conservation policy, and will yield a significant public benefit, or

(iv) the preservation of an historically important land area or a certified historic structure.

(B) Certified historic structure.—For purposes of subparagraph (A)(iv), term “certified historic structure” means any building, structure, or land which—

(i) is listed in the National Register, or

(ii) is located in a registered historic district (as defined in section 48(g)(3)(B) and is certified by the Secretary of the Interior to the Secretary as being of historic significance to the district. A building, structure, or land area satisfies the preceding sentence if it satisfies such sentence either at the time of the transfer or on the due date(including extensions) for filing the transferor’s return under this chapter for the taxable year in which the transfer is made.

(5) Exclusively for conservation purposes.—For purposes of this subsection—

(A) Conservation purpose must be protected.—A contribution shall not be treated as exclusively for conservation purposes unless the conservation purpose is protected in perpetuity.

(B) No surface mining permitted.—

(i) In general.—Except as provided in clause (ii), in the case of a contribution of any interest where there is a retention of a qualified mineral interest, subparagraph (A) shall not be treated as met if at any time there may be extraction or removal of minerals by any surface mining method.

(ii) Special rule.—With respect to any contribution of property in which the ownership of the surface estate and mineral interests were separated before June 13, 1976, and remain so separated, subparagraph (A) shall be treated as met if the probability of surface mining occurring on such property is so remote as to be negligible.

(6) Qualified mineral interest.—For purposes of this section, the term “qualified mineral interest” means—

(A) subsurface oil, gas, or other minerals, and

(B) the right to access to such minerals.


Note 2.

Christopher Jencks goes on to present another insight on donor characteristics. The study focused on living individuals who make gifts to nonprofit organizations, as defined by the Internal Revenue Service, omitting corporate giving, bequests, gifts to individuals, and gifts to political
parties and candidates, and pressure groups. These five factors he felt effected the individual living
donor’s motivation to give:

1. Donor’s gift distribution among different types of organizations;
2. Personal income as it relates to the philanthropic effort by the individual;
3. Personal characteristics of the donor that may effect their philanthropic effort;
4. Tax deductibility as an affect on the size of the individual’s donation; and,
5. Temporal influences on the donor’s propensity to give (Jencks 1987, 321).

Note 3.

Non-profit conservation organizations must be organized and operated to assure tax exempt status. This is particularly true to be able to receive tax exempt land contributions. If the organization fails in either area, exemptions will be denied (Brenneman 1967, 66-67). The donor who wishes to donate a land gift to a particular nonprofit organization, has to make sure both the land donor’s gift and the land donee, the land trust, comply with stringent IRS Codes and Regulations. If one knows their property meets the requirements on tax deductible land benefits, and the land owner is of the frame of mind to donate, it seems it would heighten the motivational mind set of the land owner to know their property is qualified for a tax deductible donation.
APPENDIX V

POSITIVE IMAGES
BY PHILANTHROPIC PERSONALITY
Positive images by philanthropic personality

The following table displays each of these philanthropic personalities with a word group indicating positive characteristics or images which can be associated with the seven donor type personalities.

<table>
<thead>
<tr>
<th>Philanthropic Personality</th>
<th>Positive Images</th>
</tr>
</thead>
<tbody>
<tr>
<td>Repayer</td>
<td>Pay back, Grateful, Effectiveness, Socially responsible</td>
</tr>
<tr>
<td>Communitarian</td>
<td>Responsibility, Service, Fund raising, Accountability, Socially responsible, Socially responsible, Good for the community</td>
</tr>
<tr>
<td>Socialite</td>
<td>Special event, Charity functions, Fund raising, Supporting each other</td>
</tr>
<tr>
<td>Altruist</td>
<td>Self-fulfillment, Sense of purpose, Self-actualization</td>
</tr>
<tr>
<td>Devoutest</td>
<td>God, Duty, Service, Sense of purpose, Supporting each other</td>
</tr>
<tr>
<td>Investor</td>
<td>Results, Performance, Fiduciary, Professional, Accountability, Doing good</td>
</tr>
<tr>
<td>Dynast</td>
<td>Family tradition, Responsibility, Socially responsible</td>
</tr>
</tbody>
</table>

Source: Prince and File 1994, 139
APPENDIX VI

AN OVERVIEW FOR DESIGN AND DEVELOPMENT OF THE QUESTIONNAIRE
A. Survey limitations

Defining limitations for the survey provided clarification in reporting the results. Doing so guides the type of analysis to be applied to the results, as well as to gain an understanding of the respondents surveyed (Leedy 1989, 58). It should be noted the data for analysis was relayed in most part, on the land trusts administrators’ perceptions of their donors’ understanding as to what influenced them to be motivated to make a decision to donate land. The limitations are as follows:

1. Only those land trusts protecting a minimum of 1,000 acres through either easement holdings and/or as land directly donated as fee simple were chosen to have their administrators surveyed.

   **Rationale:** Selection criteria such as budget, membership, years in existence, etc. limited the number of land trusts to be surveyed. Therefore, it was deemed that to have an adequate number of items for data analysis, land trusts were selected which protected a large enough acreage. Doing so implied an accurate and organized data base on land gifts would be available to a land trust's administrator or their representative. Also, experienced land trust administrators provided answers to questions eliciting intrinsic insights about donors’ beliefs and attitudes. It was also perceived that selecting land trusts’ administrators from a nationwide listing would provide respondents from the widest range.

2. Land trust administrators or officers of the land trust were the selected respondents—acting as representatives of land donors to their land trusts. Land donors were not surveyed.

   **Rationale:** The identification of problematic areas initially led the researcher to land trust administrators as being the most accessible respondents for the survey. The right of privacy of individual land donor would block the researcher’s accessibility to complete the survey. While this condition does not mean individual interviews or questionnaires completed by the actual land donors were possible, it would be problematic for the researcher to accomplish this given the available resources and the concern for privacy and confidentiality—both for the donor and the land trust. The land trust administrators were entrusted to provide as accurate data as possible about their land donors. This data gathering technique has been an acceptable research method for obtaining information about organizations through their leaders (Freeman, 1968).

3. The land trusts’ administrators surveyed were a universe/discrete population of all the known land trusts defined by the 1,000 acre minimum parameter for land being protected. One hundred ninety-seven land trusts were in this group, and 104 or 53% responded. Therefore, all differences revealed in analysis were
real differences which apply to only these 104 land trusts director' land donors, statistical inferences were negligible and not indicative or representative of the remainder of the land trusts' land donors outside of the 197 surveyed.

B. Selecting Land Trusts for the Survey
Land trusts with a minimum 1,000 acres under protection by the land trust was the criterion for selecting the land trusts to be surveyed. One hundred and ninety-seven land trusts qualified as respondents for the survey. If a state did not list a land trust which contained 1,000 acres under protection by conservation easement or direct ownership, then the next land trust listed with acreage closest to 1,000 acres being protected and with a portion of those acres protected by a conservation easement was then selected to be in the survey. When previous criteria were applied such as the land trust's annual operating budget (minimum of $100,000), number of years in existence (minimum 10 years), number of full time staff (1 or more), size of membership (minimum 50), and the number of protected acres to date by fee simple donation or conservation easement donation (minimum 10,000), it became obvious that a large enough population to be surveyed could not be obtained to yield a desirable response rate. Therefore, it was concluded that a minimum of 1,000 acres would be the single most important factor for selecting qualified land trusts to be surveyed. It stood to reason that if a land trust was protecting at least 1,000 acres, then the trust's level of management, the number and level of land donor-land trust interaction, and the types of land gifts being received and protected to date would make the land trust's administrator a valid respondent to be included in the survey.

C. The Question-writing Process
Dillman (1978) developed a method for accurately conducting mail and telephone surveys known as the total design method. Some of those procedures are used for the present survey. The design and development of the questionnaire was based on this method so as to obtain the desired information as objectively as possible. The question-writing process was divided into three parts: 1) the types of information sought, 2) structure of questions, and 3) wording of questions (Dillman 1978, 80).

First, the type of information sought in this survey from land trust administrators about their land donors could be classified into four question types:

1) attitudes,
2) attributes,
3) beliefs; and
4) behavior.

The second major concern in developing the questionnaire was determining the structure of the questions. There were four basic types of questions used for the survey:
1) open-ended,
2) close-ended with ordered choices,
3) closed-ended with unordered response choices; and
4) partially closed ended (Dillman 1978, 86,87) (Appendix IX, Questionnaire).

The third aspect of developing the questionnaire was to word the questions so they could be quickly understood and would provide the accurate data. A number of general guidelines were followed when writing the questions, which included avoiding unconventional phrasing, mutually exclusive questions, bias, and overly vague or unspecific questions (Dillman 1978, 97-117).

D. Question Types

The information sought in this survey was categorized into four question types.

These were:

1. **Attitudinal questions** were used to describe how people feel about donating land. They reflect the respondent's views about the desirability or the tendency of donors to give land (Dillman 1978, 81). For example: how an important a decision was it to the land donor to know their land contained an ecosystem with unique, rare, or endangered plant or wildlife species respond by indicating on a Likert scale of 1 to 5, from 1—not important, to 5—very important. Similarly, was the land donor influenced to make the land donation to prevent his/her land from being developed for other purposes (Appendix IX, Questionnaire, questions 19-32)?

2. **Belief questions** were designed to ascertain what a respondent thought was true or false, and to test respondents' knowledge of specific facts. In some instances, a respondent dealt with an issue about which no one had an answer. Belief questions were designed to elicit a respondent's perceptions about past, present, and future reality. It may be difficult to elicit the information that is strictly a belief, which may mean a respondent may be providing an attitudinal insight for that question. Dillman's research of these two belief questions found the researchers would rather not ignore "gray" areas where they become intertwined, but rather maintain a conceptual distinction between belief and attitude to help frame the questions (Dillman 1978, 82,83). A representative question would be to ask the land trust administrators to respond to how frequently they believed they felt their land donation was solely for altruistic purposes. The land trust administrators were also expressing their perception of land donors beliefs which were consistent with their land trust's mission and programs. The frequency of belief by the respondent was ascertained on a scale of: 1 = none, 2 = some, 3 = most, and four indicating, do not know (Appendix IX, Questionnaire, questions 39-43).
3. **Behavior questions** were designed to elicit beliefs about land trust administrators' and to information about views pertaining to an issue experienced only cognitively, as compared to a physical, sense. This type of question was generally concerned with what the respondent knew about the donor's past, what the donors were currently doing, and what the donors may plan to do in the future (Dillman 1978, 83).

A representative question on behavior would be to ask land trust administrators' their perception of the preferred behavior of their land donors towards their choices for obtaining advise prior to making the land donation decision. Aspects of this behavior influencing the donor to make this choice were characterized by how much emphasis the donor would value the importance for selecting, e.g., their own legal counsel, an accountant and/or tax advisor, family members, and even other non-profit organizations in seeking their advice prior to making the land donation decision. In this instance, the land trust administrator would be asked to respond by giving a categorical percentage or simply as *do not know* (Appendix IX, Questionnaire, questions 5-18).

4. **The attribute question** was the fourth question type. It concerned the personal or demographic characteristics that people tend to think they possess as compared to something they do. In this case, the respondent was asked to provide information about the donor's place of residence or political ideology (Dillman 1978, 83). The purpose was to select the most appropriate type and structure for a question. In this instance, the respondent was being asked to ascertain information to the best of his/her knowledge about their land donor population.

A representative question would be inquiring of the land trust administrators to provide insight about their donors' ties to the community. In this instance, the respondent was asked to approximate the amount of time the majority of the donors had resided in the community when they made their first land donation. The respondent was asked to select a certain group that represented a range of years in which the majority of the land donors had resided prior to their decision to give land. Similarly, land donors that had their principle place of residence in the community where they made their first land donation could be another attribute indicative of a land donor's ties to their community (Appendix IX, Questionnaire, questions 3-4).

E. **Structure of Questions**

The second major concern in developing the questionnaire was determining the structure of questions. The basis for distinguishing among the questions was in the nature of the response behavior being asked of the land trust administrator about their land donors. There were four basic question structure types used in the survey:
1. **Open-ended questions** have no answer choices from which the land trust administrator could select for their response. The respondents were asked to create their own answers and state them in their own words.

2. **Closed-ended questions with ordered choices** had answers provided for respondents to select. Each question represented an incremental single dimension of some thought or behavior. The respondent's task was to select the most appropriate place on a continuum which would why he/she thought it was the their most appropriate response.

3. **Close-ended questions with unordered response choices/answers** also were provided with answers, but no single dimension underlined the questions. Respondents were asked to choose from a set of discrete, unordered categories by independently evaluating each choice and then selecting the one that best reflected the donor's situation.

4. **Partially close-ended questions** were provided with choices so the respondents had the option of creating their own responses. The choices were basically unordered choices, although occasionally ordered choices were provided (Dillman 1978, 86,87).

**F. Question Wording**

The third and final aspect of developing the survey questionnaire was wording the questions so they could be quickly understood. Using the direction provided by Dillman's questionnaire research, there were a number general guidelines that were heeded when writing a question. The following represent guidelines which were considered when composing the questions:

1) select words and phrases that will be uniformly understood,
2) do not use abbreviations or unconventional phrases,
3) eliminate vague questions,
4) do not use questions that are too precise,
5) be aware of assuming too much about the respondent's behavior,
6) avoid technically inaccurate questions,
7) utilize an appropriate time referent,
8) avoid a cryptically written question; and
9) provide some level of response comparison with existing information (Dillman 1978, 95-117).
G. Pretesting

Nine respondents were contacted for the pretest and all but one replied. Most comments were encouraging, although one comment identified extraneous information on Part VIII, Donor's Tendencies Towards Issues. Therefore, this information was omitted. The remainder of the changes pertained to editing and proof reading.

H. Questionnaire Design

Much care was given in ordering questions, selecting the first question, establishing vertical flow, formatting the booklet, establishing vertical flow of answers, identifying answer categories, the proper use of upper and lower case for questions and answers, providing directions to complete the survey, assigning similar groups of questions to a page or as two pages facing one another, and using appropriate transitional elements (Appendix IX, Questionnaire) (Dillman 1978, 120-149).

Each questionnaire contained an identity code for its geographic region which was used solely to record response rate. Instructions addressed to the respondent for completing the questionnaire were also included. These instructions covered the information presented in the cover letter. The body of the questionnaire consisted of 50 questions with approximately 75 responses. The number of questions was within the boundaries suggested by Dillman for a questionnaire being sent to a select population to achieve a response rate of at least 50% (Dillman 1978, 58). The questionnaires were sent to respondents in a large manilla envelope. Each envelope contained the cover letter, the questionnaire, and the self-addressed stamped return envelope. The respondent was offered the opportunity to request a copy of the results.
APPENDIX VII

COVER LETTER TO RESPONDENTS
Re: Land Donor Motivation Study

Dear «Greeting»:

Your name was selected from the Land Trust Alliance's national membership directory to assist in a study about land donor motivation. As an administrator for «Trust», you are undoubtedly knowledgeable about your land donor's giving patterns, as well as their property and conservation easement records. The information that you and others provide will be used to develop a profile of land donors. This profile should aid in the identification of potential land donors. The study's findings also should be helpful to land trusts in effectively pursuing their mission through well-coordinated relationships with local area land owners and land use planning officials.

Please familiarize yourself with the questionnaire before responding. It should take you about a half hour to complete. The questionnaire has an identification number for tracking purposes, but your responses will be kept strictly confidential. Your name, or your land trust's name, will not be placed on the questionnaire, nor will information be reported in a manner in which your organization could be identified.

This study is being conducted under the auspices of the Department of Landscape Architecture and the Department of Community and Regional Planning at Iowa State University. The data collection is for a thesis and your participation is voluntary. If you have any questions about this study, please contact me at (515) 294-8959 or (515) 294-3415.

Please return this questionnaire by Wednesday, November 30, 1994. Your participation in this survey is important to our understanding of land donor motivations and, ultimately, to the success of protecting special lands! Findings of the survey will be available at your request.

Thank you for your assistance.

Sincerely,

Stephen Wesley Goltry
Study Director
Land Donor Motivation Study

Encl.: 1 questionnaire booklet with return envelope
APPENDIX VIII

PRETEST COVER LETTER
Dear:

I am investigating what motivates land donors to bestow conservation easements and donate their property to a land trust as the topic of my Masters thesis in Community and Regional Planning and Landscape Architecture. To do this I will need the help of land trust directors to complete a mailed survey questionnaire. I would like you to review and comment on the enclosed pre-test questionnaire prior to mailing the final version.

Initial thought was given to interviewing the land donors directly. However, resources, time, and land donor confidentiality considerations eliminated that survey method. Subsequently for this exploratory qualitative research method,* I have chosen to survey approximately two hundred land trust directors to acquire information about their land donors. They are located in the major growth regions of the country and generally have a minimum of one thousand acres under their protection.

Obviously, the effectiveness of this questionnaire will have an effect on the data obtained. This is why I have sought your expertise. Approximately a week from now, I will telephone you to receive your comments on the questionnaire. The questionnaire was reviewed by my thesis committee and is now in the process of being reviewed by the Human Subjects Review Committee of the Graduate College. Please try to bring out your ideas for a better type of question, or an improvement of a question that will make the research results meaningful to land trusts.

Your time and interest in this study are appreciated.

Thank you.

Sincerely yours,

Stephen Wesley Goltry
Study Director

* The purpose of an exploratory study is to explain the forces causing the phenomenon in question; such as what beliefs, attitudes, policies, or events are shaping this phenomenon and how might they interact on this phenomenon.
APPENDIX IX

QUESTIONNAIRE
A study of the motivation of land owners to donate conservation easements and their property to a land trust

STEPHEN GOLTRY, STUDY DIRECTOR
126 College of Design, Iowa State University
Ames, Iowa 50011-3099
(515) 294-8959
November 1994
YOUR QUESTIONNAIRE INSTRUCTIONS

• This questionnaire solicits data on the motivation of land donors to bestow conservation easements and donate their property to a land trust.

• It is important that you, the Executive Director of your land trust, complete this questionnaire. Please do not ask someone else to complete it.

• For purposes of this questionnaire, the term “donor” refers to one that has given an interest in land (fee simple, conservation easement, or some other interest) to a land trust. “Gift” and “gift of land” are also phrases referring to land given as either fee simple, conservation easement, or some other interest.

• Please feel free to amplify upon your responses to individual questions or items. This can be done in the margins or by adding additional pages.

• Please acquaint yourself with the questionnaire before answering. This will help you to provide your best and most appropriate response. Some of the topics include: donors’ ties to the community, financial and environmental influences, and types of land gifts.

• Accuracy of answers is obviously important, however some answers will likely have to be estimates or your best judgments. If you are uncertain about how to answer a question, please provide data that you feel best answers the question. If the requested information is not known, please indicate this after the question.

• When you have completed the questionnaire:

  1) Place it in the self-addressed stamped envelope that has been provided.

  2) Mail it immediately! Receipt of your questionnaire by Wednesday, November 30, 1994, will be greatly appreciated and will contribute to the success of this research.

THANK YOU FOR YOUR PARTICIPATION

If you have any questions you may call Stephen Goltry, Study Director, at 515-294-8959 or 515-294-3415.

Q-1. Using the accompanying diagram of the United States, please check all of the geographical regions of the United States where your land trust has received land donations.
Q-2. Please circle the proportion of all land presently held by your land trust that falls into each of the categories listed below.

<table>
<thead>
<tr>
<th>PERCENT OF ALL LAND HELD</th>
<th>0-25%</th>
<th>26-50%</th>
<th>51-75%</th>
<th>76-100%</th>
<th>DO NOT KNOW</th>
</tr>
</thead>
<tbody>
<tr>
<td>a. Rural, Farm/Ranch</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
</tr>
<tr>
<td>b. Rural, Non-farm</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
</tr>
<tr>
<td>c. Rural, Woodland</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
</tr>
<tr>
<td>d. Rural, Other</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
</tr>
<tr>
<td>e. Suburban</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
</tr>
<tr>
<td>f. Urban</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
</tr>
</tbody>
</table>

Q-3. What was the approximate amount of time that the majority of donors had resided in the community when they made their first land donation? Please check only one.

<table>
<thead>
<tr>
<th>PERCENT OF ALL LAND HELD</th>
<th>0-5 YEARS</th>
<th>6-10 YEARS</th>
<th>11-15 YEARS</th>
<th>16-20 YEARS</th>
<th>21 YEARS &amp; LONGER</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
<td></td>
</tr>
</tbody>
</table>

Q-4. What percent of your land donors have their principal residence in the community where they made their first land donation? Please circle one.
## PART II. ASSISTANCE USED BY DONORS

Of all your land donors, about what proportion sought information or advice from the following? Please circle one.

<table>
<thead>
<tr>
<th>Question</th>
<th>Assistance Requested</th>
<th>Percent of All Land Held</th>
</tr>
</thead>
<tbody>
<tr>
<td>Q-5.</td>
<td>Their own Legal council</td>
<td>1 2 3 4 5</td>
</tr>
<tr>
<td>Q-6.</td>
<td>Accountant/Tax Advisor</td>
<td>1 2 3 4 5</td>
</tr>
<tr>
<td>Q-7.</td>
<td>City Officials</td>
<td>1 2 3 4 5</td>
</tr>
<tr>
<td>Q-8.</td>
<td>County Officials</td>
<td>1 2 3 4 5</td>
</tr>
<tr>
<td>Q-9.</td>
<td>State Officials</td>
<td>1 2 3 4 5</td>
</tr>
<tr>
<td>Q-10.</td>
<td>Professional Land Planners</td>
<td>1 2 3 4 5</td>
</tr>
<tr>
<td>Q-11.</td>
<td>Professional Landscape Architects</td>
<td>1 2 3 4 5</td>
</tr>
<tr>
<td>Q-12.</td>
<td>Appraisers</td>
<td>1 2 3 4 5</td>
</tr>
<tr>
<td>Q-13.</td>
<td>Other Donors</td>
<td>1 2 3 4 5</td>
</tr>
<tr>
<td>Q-14.</td>
<td>Family</td>
<td>1 2 3 4 5</td>
</tr>
<tr>
<td>Q-15.</td>
<td>Friends</td>
<td>1 2 3 4 5</td>
</tr>
<tr>
<td>Q-16.</td>
<td>Other Donors</td>
<td>1 2 3 4 5</td>
</tr>
<tr>
<td>Q-17.</td>
<td>Non-profit Organizations</td>
<td>1 2 3 4 5</td>
</tr>
<tr>
<td>Q-18.</td>
<td>Your Land Trust</td>
<td>1 2 3 4 5</td>
</tr>
</tbody>
</table>
## PART III. FACTORS AFFECTING LAND DONORS' ATTITUDES

On average, how important do you feel that each of the following factors were in influencing your land donors' decisions? **Please circle one response for each statement.**

<table>
<thead>
<tr>
<th>IMPORTANCE IN DECISIONS</th>
<th>NOT IMPORTANT</th>
<th>MODERATELY IMPORTANT</th>
<th>VERY IMPORTANT</th>
</tr>
</thead>
<tbody>
<tr>
<td>Q-19. Their land contained an ecosystem with unique, rare, or endangered plant or wildlife species.</td>
<td>1</td>
<td>2</td>
<td>3</td>
</tr>
<tr>
<td>Q-20. Their land contained cultural or historical sites/structures.</td>
<td>1</td>
<td>2</td>
<td>3</td>
</tr>
<tr>
<td>Q-21. Their land contained regionally important or prime farmland.</td>
<td>1</td>
<td>2</td>
<td>3</td>
</tr>
<tr>
<td>Q-22. Their land was important to the family's history.</td>
<td>1</td>
<td>2</td>
<td>3</td>
</tr>
<tr>
<td>Q-23. Their land contained recreational and/or outdoor educational features attractive to the general public and local communities.</td>
<td>1</td>
<td>2</td>
<td>3</td>
</tr>
<tr>
<td>Q-24. Reduction of local property taxes.</td>
<td>1</td>
<td>2</td>
<td>3</td>
</tr>
<tr>
<td>Q-25. Reduction of state property taxes.</td>
<td>1</td>
<td>2</td>
<td>3</td>
</tr>
<tr>
<td>Q-26. Reduction of state estate taxes.</td>
<td>1</td>
<td>2</td>
<td>3</td>
</tr>
<tr>
<td>Q-27. Reduction of federal estate taxes.</td>
<td>1</td>
<td>2</td>
<td>3</td>
</tr>
<tr>
<td>Q-28. Belief in the importance of their family's philanthropic activities.</td>
<td>1</td>
<td>2</td>
<td>3</td>
</tr>
<tr>
<td>Q-29. Belief in the influence of the donor's peers to donate land.</td>
<td>1</td>
<td>2</td>
<td>3</td>
</tr>
<tr>
<td>Q-30. Had an enjoyable relationship with your land trust staff during the land donation process.</td>
<td>1</td>
<td>2</td>
<td>3</td>
</tr>
<tr>
<td>Q-31. Used the donation to prevent their land from being developed for other purposes.</td>
<td>1</td>
<td>2</td>
<td>3</td>
</tr>
<tr>
<td>Q-32. Knew of others that had done the same thing.</td>
<td>1</td>
<td>2</td>
<td>3</td>
</tr>
</tbody>
</table>

**IMPORTANCE IN DECISIONS**

<table>
<thead>
<tr>
<th>NOT IMPORTANT</th>
<th>MODERATELY IMPORTANT</th>
<th>VERY IMPORTANT</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>2</td>
<td>3</td>
</tr>
<tr>
<td>4</td>
<td>5</td>
<td></td>
</tr>
</tbody>
</table>
PART IV. DONORS' LAND GIFT TYPES

Please circle one.

PERCENT LAND GIFT TYPES

<table>
<thead>
<tr>
<th></th>
<th>0-25%</th>
<th>26-50%</th>
<th>51-75%</th>
<th>76-100%</th>
<th>DO NOT KNOW</th>
</tr>
</thead>
<tbody>
<tr>
<td>Q-33. Of all your land trust's donors, what percentage are land donors?</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
</tr>
<tr>
<td>Q-34. Of all your land donors, what percentage have given fee simple?</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
</tr>
<tr>
<td>Q-35. Of all your land donors, what percentage have given a conservation easement?</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
</tr>
<tr>
<td>Q-36. Of all your donors, what percentage have given an interest other than fee simple or a conservation easement?</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
</tr>
</tbody>
</table>

PART V. DOLLAR VALUE OF LAND DONATIONS

Based on the fair market value at the time the donation was made, what was the dollar value of each of your five largest land donations in the 1990-1994 period? If you can, please write in the amount to the nearest whole $10,000 and the year it was donated.

<table>
<thead>
<tr>
<th>Q-37. LAND DONATION VALUE</th>
<th>Q-38. DONATION YEAR</th>
</tr>
</thead>
<tbody>
<tr>
<td>a. $______________</td>
<td>a. $______________</td>
</tr>
<tr>
<td>b. $______________</td>
<td>b. $______________</td>
</tr>
<tr>
<td>c. $______________</td>
<td>c. $______________</td>
</tr>
<tr>
<td>d. $______________</td>
<td>d. $______________</td>
</tr>
<tr>
<td>e. $______________</td>
<td>e. $______________</td>
</tr>
</tbody>
</table>

Land Donor Motivation Survey
### PART VI. DONORS’ BELIEFS

About how many of your land donors believe the following? **Please circle one.**

<table>
<thead>
<tr>
<th>FREQUENCY OF BELIEF</th>
<th>NONE</th>
<th>SOME</th>
<th>MOST</th>
<th>DO NOT KNOW</th>
</tr>
</thead>
<tbody>
<tr>
<td>Q-39. Feel that their land donation was solely for altruistic purposes, or “the joy of giving”?</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
</tr>
<tr>
<td>Q-40. Indicate they wanted to give “something to their community”?</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
</tr>
<tr>
<td>Q-41. Seek to protect a certain type of landscape (i.e., scenic, pristine, wilderness, historical, or cultural)?</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
</tr>
<tr>
<td>Q-42. Express beliefs consistent with your land trust’s mission and programs?</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
</tr>
<tr>
<td>Q-43. Express a strong commitment to conservation/land stewardship values.</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
</tr>
</tbody>
</table>
PART VII. DONORS' GIVING TRENDS

Please write in the amount or “do not know.”

<table>
<thead>
<tr>
<th>PERIOD</th>
<th>ALL ACREAGE</th>
<th>NO NOT KNOW</th>
</tr>
</thead>
<tbody>
<tr>
<td>a. 1980-84</td>
<td>______ acres</td>
<td>□</td>
</tr>
<tr>
<td>b. 1985-89</td>
<td>______ acres</td>
<td>□</td>
</tr>
<tr>
<td>c. 1990-94</td>
<td>______ acres</td>
<td>□</td>
</tr>
</tbody>
</table>

Q-44. About how many acres were donated as conservation easements only for each of these five-year periods?

<table>
<thead>
<tr>
<th>PERIOD</th>
<th>NUMBER OF DONORS</th>
<th>NO NOT KNOW</th>
</tr>
</thead>
<tbody>
<tr>
<td>a. 1980-84</td>
<td>______ acres</td>
<td>□</td>
</tr>
<tr>
<td>b. 1985-89</td>
<td>______ acres</td>
<td>□</td>
</tr>
<tr>
<td>c. 1990-94</td>
<td>______ acres</td>
<td>□</td>
</tr>
</tbody>
</table>

Q-45. About how many acres were donated as fee simple only for each of these five-year periods?

<table>
<thead>
<tr>
<th>PERIOD</th>
<th>NUMBER OF DONORS</th>
<th>NO NOT KNOW</th>
</tr>
</thead>
<tbody>
<tr>
<td>a. 1980-84</td>
<td>______ acres</td>
<td>□</td>
</tr>
<tr>
<td>b. 1985-89</td>
<td>______ acres</td>
<td>□</td>
</tr>
<tr>
<td>c. 1990-94</td>
<td>______ acres</td>
<td>□</td>
</tr>
</tbody>
</table>

Q-46. About how many acres were donated as some other interest only for each of these five-year periods?

<table>
<thead>
<tr>
<th>PERIOD</th>
<th>NUMBER OF DONORS</th>
<th>NO NOT KNOW</th>
</tr>
</thead>
<tbody>
<tr>
<td>a. 1980-84</td>
<td>______ acres</td>
<td>□</td>
</tr>
<tr>
<td>b. 1985-89</td>
<td>______ acres</td>
<td>□</td>
</tr>
<tr>
<td>c. 1990-94</td>
<td>______ acres</td>
<td>□</td>
</tr>
</tbody>
</table>

Q-47. About how many donors have donated conservation easements only for each of these five-year periods?

<table>
<thead>
<tr>
<th>PERIOD</th>
<th>NUMBER OF DONORS</th>
<th>NO NOT KNOW</th>
</tr>
</thead>
<tbody>
<tr>
<td>a. 1980-84</td>
<td>______ acres</td>
<td>□</td>
</tr>
<tr>
<td>b. 1985-89</td>
<td>______ acres</td>
<td>□</td>
</tr>
<tr>
<td>c. 1990-94</td>
<td>______ acres</td>
<td>□</td>
</tr>
</tbody>
</table>

Q-48. About how many donors have donated as fee simple only for each of these five-year periods?

<table>
<thead>
<tr>
<th>PERIOD</th>
<th>NUMBER OF DONORS</th>
<th>NO NOT KNOW</th>
</tr>
</thead>
<tbody>
<tr>
<td>a. 1980-84</td>
<td>______ acres</td>
<td>□</td>
</tr>
<tr>
<td>b. 1985-89</td>
<td>______ acres</td>
<td>□</td>
</tr>
<tr>
<td>c. 1990-94</td>
<td>______ acres</td>
<td>□</td>
</tr>
</tbody>
</table>

Q-49. To the best of your estimation, why did the donors select your land trust as the donee? Please write a brief response.
## PART VIII. DONORS' TENDENCIES TOWARDS ISSUES

Please circle the appropriate response.

<table>
<thead>
<tr>
<th></th>
<th>0-25%</th>
<th>26-50%</th>
<th>51-75%</th>
<th>76-100%</th>
<th>DO NOT KNOW</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Q-50.</strong> About what proportion of your land donors take political positions on issues that might be considered:</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1. Conservation</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
</tr>
<tr>
<td>2. Middle-of-the-road</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
</tr>
<tr>
<td>3. Liberal</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
</tr>
</tbody>
</table>

Thank you for completing this survey.
YOU HAVE COMPLETED A QUESTIONNAIRE
ABOUT A VERY IMPORTANT TOPIC FOR LAND TRUSTS!

Findings of this survey will be available upon request.
Please check here if you would like to receive these findings.

This study is being conducted under the auspices of the
Department of Landscape Architecture and
the Department of Community and Regional Planning
within the College of Design, Iowa State University.
APPENDIX X

POSTCARD REMINDER
About two weeks ago a questionnaire was mailed to you regarding land donor motivation. As of today, we have not yet received your completed questionnaire. If you have recently completed the questionnaire and it is in the mail, thank you very much for your assistance. If you have not yet been able to complete it, please do so as soon as possible.

We are conducting this study because we feel it is important to understand the motivations of land donors. In order to obtain accurate and useful information, we need to gather responses from as many informed persons as possible.

If you are no longer the director for your land trust, have misplaced your questionnaire, or did not receive one in the first place, please contact us immediately. Call us at (515) 294-8959 or (515) 294-3415, or write to us c/o Department of Regional and Community Planning, 126 College of Design, Iowa State University, Ames, Iowa 50011-3095. Thank you.

Stephen Wesley Goltry, Study Director
PREFACE
In the following discussion, tables and figures represent supportive information for questions 1, 2, 3, 4, 5-18, 33-36, 37, 44-48, 49, and 50 of the questionnaire. This survey data was deemed ancillary to the present thesis topic. It is presented to provide a complete questionnaire survey report, and to provide a contextual understanding of the environment surrounding the respondents, and assist others in further research. The results of questions 19-32 and 39-43 are presented in Chapter IV. Question 38 did not receive adequate information to report.

1. QUESTION 1
Regional distribution among land donors These results reflect attributes that help to define characteristics surrounding the land donors’ setting and that in turn may offer a contributing influence to their decision to donate land.

The first survey question defines the land donors’ local region within the United States (Appendix IX, Questionnaire, question 1). Figure XI.1 indicates a varying number of land trust administrators responding from each of the eight regions. The respondents’ geographical distribution showed Region 5 (New England) reporting 34% of the total respondents. Region 6 (Mid-Atlantic) had the second largest percentage (17%). Region 4 (Great Lakes and Upper Mid-West) regions had 16%. Regions 1 and 8 (the Far West) had 15% of the respondents. Region 7 (South) followed with 10%, with Region 2 (Rocky Mountain) at 7%, and lastly the Plains region with only 1% of the respondents.

The responses in the present thesis where compared to a previous survey conducted in 1990 of private land trust organizations conducted by the Land Trust Alliance (Bacher, 1991). While the survey examined representatives of land trusts with certain qualifying characteristics (Appendix VI, An Overview for Design and Development of the Questionnaire), it was deemed appropriate to make this comparison between the two surveys to ascertain if similarities might be revealed. The thesis survey respondents and the Land Trust Alliance survey each indicated the New England, Mid-Atlantic, and the Far West regions’ land trust percentage of respondents remained somewhat the same (Figure XI.1). Increases were observed in the South, the Rocky Mountains, and the Upper Mid-West and Great Lakes State regions. The increase of the present survey’s respondent participation over that in the Land Trust Alliance survey may be due to the possible increase in new land trusts in those regions since their 1990 survey. The Plains region reported the least proportion of land trust respondents, or only 1%.

Noticeably, regions with the larger proportional responses as presented in Figure XI.1, either as indicated by the 1991-92 National Directory of Conservation Land Trusts (Bacher, 1991) or the present survey, may be attributed to expanding land development pressures occurring in the near proximity to metropolitan regional centers (Heimlich 1989, 457-459). The “fringe zone” that surrounds metropolitan settlements in most cases deceptively continues to expand into natural and cultural landscapes as well as arable cropland. These lands are properties which hold potentially
Figure XI.1  The geographical distribution of land donors throughout the U.S.
(National Directory of Conservation Land Trusts (Bacher 1991))
favorable sites for various forms of land development. Also, these differences in the land trust respondent distribution may be attributed to a legacy of settlement patterns. The larger proportion of responses from New England can be attributed to the colonial settlement patterns and to the origins for many of this country's first land trusts. The Western and Upper-Midwest regions' proportion of respondents may be attributed to later territorial expansion influences of America's growth in the late 19th century, and possibly to a general reluctance of the early settlers to fully accept and appreciate the benefits of the land trust as a form of land tenure.

2. QUESTION 2

Land types held by a land trust A categorical percentage indicated the proportion of land types held by land trusts (Appendix IX, Questionnaire, question 2). The assigned categories of "rural, farm/ranch," "rural, non-farm," "rural woodland," "rural, other," "suburban," and "urban" are shown in Table XI.1. An estimated average percentage technique was used to rank the six land types according to the range of percent categories indicated by the respondents.

Overall, the largest percentage land type held by a land trust was "rural, woodland." The primary land types held by land trusts may be an indication of the land type which was previously held by the owner at the time the donation was made. Also, the donated land was probably the primary land type dominating a particular geographical region. Since most of the U.S. land trusts are predominately in the New England region, and this geographical region is predominately forested woodland, then most of the donated lands held by those land trusts would be "rural, woodland." These results also confirm very few suburban and urban land types are held by land trusts. This aspect will probably remain so since land trusts generally receive land donations from parties who wish to protect property in the the rural or sparsely settled lands. Those people residing on such properties generally have full recognition of the external influences an expanding

<table>
<thead>
<tr>
<th>Categorical Peracentages of Land Types</th>
<th>0-25</th>
<th>26-50</th>
<th>51-75</th>
<th>76-100</th>
<th>Mean</th>
</tr>
</thead>
<tbody>
<tr>
<td>Rural, Woodland</td>
<td>11</td>
<td>20</td>
<td>46</td>
<td>23</td>
<td>2.8</td>
</tr>
<tr>
<td>Rural, Non-farm</td>
<td>14</td>
<td>76</td>
<td>4</td>
<td>6</td>
<td>2.0</td>
</tr>
<tr>
<td>Rural, Farm/Ranch</td>
<td>30</td>
<td>55</td>
<td>7</td>
<td>8</td>
<td>1.9</td>
</tr>
<tr>
<td>Rural, Other1</td>
<td>27</td>
<td>5</td>
<td>6</td>
<td>3</td>
<td>6.0</td>
</tr>
<tr>
<td>Suburban</td>
<td>30</td>
<td>64</td>
<td>2</td>
<td>4</td>
<td>1.8</td>
</tr>
<tr>
<td>Urban</td>
<td>99</td>
<td>1</td>
<td>0</td>
<td>0</td>
<td>1.0</td>
</tr>
</tbody>
</table>

1 Percent will not sum to 100% because of the missing values.
metropolitan area has on these outlying pristine lands and the implications these forces have on their property. However, this is not to say urban properties that are remnants of natural systems that have been encroached upon by urban development are not just as worthy of protection as those properties and lands localed outside an urban built-up area.

3. QUESTION 3

Length of time in which most land owners had resided in the community when they made their first land donation

Table XI.2 presents the land donors' community ties based on the length of time a land owner had resided in a community as indication of a possible influence for land donation to a land trust. It appeared evident land owners' donations were apt to occur more often after having resided in their community 21 years or more. It is also to be noted that for this time period of residency it is over twice the percentage of the 16-20 years of residency, that being a 35% difference. This sharp contrast tends to infer the land owner has resided in his/her community for longer than two decades, and that condition may have instilled a personal degree of empathy and/or obligation within the land owner to return "something to the community." It is not known if these periods of residence are continuous. Conversely, circumstances surrounding a land owner's estate planning may have played just as a significant role regardless of the time a donor had held property and/or resided in the community before making a decision to donate land. Under these circumstances, it may be possible the role the private land trust may wish to extend encouraging a land owner to consider making a land gift.

4. QUESTION 4

Land donors which had their principal residence in the community where they first donated land

Table XI.3 indicates a categorical percentage land trust administrator's land donors that had their principal residence in the community in which they resided when they made their first land donation.

Table XI.2 Length of time most land owners resided in the community when they made their first land donation

<table>
<thead>
<tr>
<th>Years Resided in Community</th>
<th>Percent n=83</th>
</tr>
</thead>
<tbody>
<tr>
<td>0-5</td>
<td>55</td>
</tr>
<tr>
<td>6-10</td>
<td>11</td>
</tr>
<tr>
<td>11-15</td>
<td>11</td>
</tr>
<tr>
<td>16-20</td>
<td>19</td>
</tr>
<tr>
<td>21 or more</td>
<td>54</td>
</tr>
<tr>
<td></td>
<td>100</td>
</tr>
</tbody>
</table>
### Table XI.3 Percent of land owners with their principle residence in the community where they first donated land

<table>
<thead>
<tr>
<th>Percent of Donors</th>
<th>Percent n=93</th>
</tr>
</thead>
<tbody>
<tr>
<td>0-25</td>
<td>20</td>
</tr>
<tr>
<td>26-50</td>
<td>14</td>
</tr>
<tr>
<td>51-75</td>
<td>17</td>
</tr>
<tr>
<td>76-100</td>
<td>49</td>
</tr>
</tbody>
</table>

Possibly the higher percentage of donors residing in their community where they made their first donation may be due to the land owner’s associations formed over the years; and in turn, these associations effected their attitudes—positive or negative, towards how they felt toward making a decision to donate their land. The lower percentage responses may be indicative that a number of land owners may have elected to move away from their principal place of residence just prior to their retirement—possibly a decision that may coincide with one’s priority for their individual estate planning.

The data obtained from these two previous questions may suggest a land owner’s long term commitment to one’s landed property, community, and home are aspects or influences which may reinforce a certain set of beliefs. These beliefs in turn affect a land owner’s decision to donate land. A land owner instilled with these beliefs and the experiences derived from the landscape over an extended period of time, could possibly act as motivating influences shaping their decision to donate their land to a land trust (Beatley, 1994).

### Questions 5-18

Assisting sources utilized by donors prior to making a land donation decision  

A land transaction involving the donation of a conservation easement on a land parcel or the gift of land fee simple is a sophisticated process with a number of property rights and tax variables impacting a land owners’ decision. Table XI.5 shows this to be evident as respondents indicated nearly three-fourths of the land donors were motivated to seek legal counsel when making this decision. It would appear this form of a donor’s action tends to reinforce a prevalent thought or “the conventional wisdom” that when one deals with their property and transfer of wealth; the land appraiser, tax, or estate planning attorney are generally the first sources to be consulted for assistance. Note that a reputable local land trust organization was highly sought after for its pre-donation advice, being that it represents a concentrated repository of the most probable successful land transactions regarding land gifts from which to advise a potential land donor. Again, this category’s responses reported within the top one-fourth of those land donors seeking advice prior to making a land donation decision.
However, it should be noted each potential land donation inherently requires its own data base and base line resource information based on the land's assets and liabilities, the owners' estate status, and the surrounding community's needs and opportunities. For example, a land owner may wish to donate part of their property, and implement a site sensitive development on a restricted portion of the remainder property in question. Stephen J. Small, a well-known attorney specializing in land trusts, regards the initial time spent with a local professional land planner and/or licensed landscape architect during the predonation phase as highly informative and opens a number of

<p>| Table XI.5 Sources used by land owners for decision-making prior to the land donation |
|---------------------------------|-----------------|----------------|----------------|----------------|-----------------|----------------|</p>
<table>
<thead>
<tr>
<th>Source</th>
<th>0-25</th>
<th>26-50</th>
<th>51-75</th>
<th>76-100</th>
<th>Percent</th>
<th>Mean</th>
</tr>
</thead>
<tbody>
<tr>
<td>Legal Counsel</td>
<td>3</td>
<td>7</td>
<td>15</td>
<td>75</td>
<td>100</td>
<td>3.6</td>
</tr>
<tr>
<td>Land Trust</td>
<td>5</td>
<td>7</td>
<td>12</td>
<td>76</td>
<td>100</td>
<td>3.6</td>
</tr>
<tr>
<td>Appraisers</td>
<td>12</td>
<td>5</td>
<td>35</td>
<td>48</td>
<td>100</td>
<td>3.2</td>
</tr>
<tr>
<td>Accountant and/or Tax Advisor</td>
<td>5</td>
<td>10</td>
<td>56</td>
<td>29</td>
<td>100</td>
<td>3.1</td>
</tr>
<tr>
<td>Family</td>
<td>9</td>
<td>12</td>
<td>51</td>
<td>28</td>
<td>100</td>
<td>3.0</td>
</tr>
<tr>
<td>Friends</td>
<td>10</td>
<td>71</td>
<td>11</td>
<td>8</td>
<td>100</td>
<td>2.2</td>
</tr>
<tr>
<td>Non-profit Organizations</td>
<td>20</td>
<td>57</td>
<td>7</td>
<td>16</td>
<td>100</td>
<td>2.1</td>
</tr>
<tr>
<td>Other Donors</td>
<td>17</td>
<td>73</td>
<td>7</td>
<td>3</td>
<td>100</td>
<td>2.0</td>
</tr>
<tr>
<td>Other Donors</td>
<td>22</td>
<td>63</td>
<td>9</td>
<td>6</td>
<td>100</td>
<td>2.0</td>
</tr>
<tr>
<td>Professional Land Planners</td>
<td>85</td>
<td>7</td>
<td>6</td>
<td>2</td>
<td>100</td>
<td>1.2</td>
</tr>
<tr>
<td>State Officials</td>
<td>94</td>
<td>4</td>
<td>2</td>
<td>*</td>
<td>100</td>
<td>1.1</td>
</tr>
<tr>
<td>City Officials</td>
<td>87</td>
<td>8</td>
<td>*</td>
<td>5</td>
<td>100</td>
<td>1.0</td>
</tr>
<tr>
<td>County Officials</td>
<td>92</td>
<td>5</td>
<td>1</td>
<td>2</td>
<td>100</td>
<td>1.1</td>
</tr>
<tr>
<td>Professional Landscape Architects</td>
<td>99</td>
<td>*</td>
<td>1.0</td>
<td>0</td>
<td>100</td>
<td>1.0</td>
</tr>
</tbody>
</table>

*No respondent reporting
N=102
options the land owner probably would not be aware of if they had relied exclusively on an estate planning attorney or other tax advisory sources. The owners who consult with either one of these professionals, and who are aware of both environmental and open space concerns, as well as the tax laws’ requirements for the deductibility of an easement donation; then each of these professional services can be helpful prior to the donation transaction as well as during it (Small, 1992). On the whole, the frequently sought advice of the appraiser’s, legal counsel’s, or tax advisor’s services become, as one might expect, a conventional yet logical choice for land owners considering a predonation land transaction. However, professional land planners, landscape architects, and others such as wildlife ecologists and historic preservationists, also bring essential expertise to assist a land owner towards the appropriate land donation decision.

6. QUESTIONS 33-36

Proportion of donors’ land gifts as land protection mechanisms Table XI.5 displays the use of a categorical percentage to indicate the proportion of land donated utilizing a different means of protection (Appendix IX, Questionnaire, questions 33-36). Sixty-six percent of the respondents indicated one-fourth of all of their donors were land donors (separating non-land donors from land donors). Within the 34%, the following proportion of land gift types were reported by the respondents. Response preference for the land gift types reported in the 0-25% category indicated 95% of the respondents reported donors used the gift of an other interest rather than giving land fee simple or a conservation easement. As for land given fee simple, 39% of the respondents felt their donors represented about one-fourth of the donors, while 27% of the respondents sensed their donors represented about three-fourths of the donors. There was a similar division reported for the conservation easement land type gift. Thirty-five percent of the respondents indicated their land contributors represented one-fourth of the donors, while 29% of the respondents indicated donors represented about three-fourths of the donors.

It may be perceived more donors tend to favor donating a conservation easement on their property than giving land fee simple. In turn this may account for why there is a greater number of acres of land under protection in this manner than possibly through land donated through a fee simple transaction. Table XI.5 illustrates that donating other interest in property, other than fee simple or conservation easement, represents tax and property variations of these two forms of rights of property as a means to protect land and for self-benefiting tax deductibility. A few of these other interests in property typically employed use donations by bequest, trade lands, reserved life estate, donation of partial interest, and a charitable remainder trust or unitrust (Iowa Natural Heritage Foundation 1992, 20-23, 26-29). Reviewing of the responses from these three forms of land type gifts, and given the survey’s means of measuring the proportion of land donation types, it can possibly be inferred that other interest in property land type gift constitutes the largest percentage of land type donations as reported by the land trust administrators in this present survey.
7. QUESTION 37

Fair market value of land donations  Table XI.6 presents responses showing both a varied and extreme range of dollar values within each of the five largest donor fair market values. Of these donations, there were a number with values which appeared to be more frequently occurring and within a less extreme range. The very extreme high dollar value contributions made it difficult to discern a valid mean donation value for the donations during this period. Figure XI.2 displays the proportion of the four groups’ range of donation values composing the fair market value of the five largest land donations made to land trusts between 1990-1994. There were 71 valid cases reporting. The four groups were fairly evenly distributed between 17 to 21 cases in each group. Group 1 (n=17) represents 23.9% of the donations and $446,603 (1%) of the total donation value. Group 2 (n=18) represents 25.4% of the donations and $3,463,603 (7%) of the total donation value. Group 3 (n=15) represents 21.1% of the donations and $5,921,400 (12%) of the total donation value. Group 4 (n=21) represents 29.6% of the donations and $40,206,900 (80%) of the total donation value.

Table XI.5  Proportion of land donated by land gift type

<table>
<thead>
<tr>
<th>Type of Land Gift</th>
<th>0-25</th>
<th>26-50</th>
<th>51-75</th>
<th>76-100</th>
<th>Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>Other interest than fee simple or conservation easement</td>
<td>95</td>
<td>1</td>
<td>1</td>
<td>3</td>
<td>100</td>
</tr>
<tr>
<td>Fee simple</td>
<td>39</td>
<td>22</td>
<td>12</td>
<td>27</td>
<td>100</td>
</tr>
<tr>
<td>Conservation easement</td>
<td>35</td>
<td>22</td>
<td>14</td>
<td>29</td>
<td>100</td>
</tr>
</tbody>
</table>

8. QUESTIONS 44-48

Land gift trends  Figure XI.3 shows between 1980-1994 the average number of conservation easement and fee simple acres per donation. The 1980-1984 period shows a 2,826 acre average for conservation easements (n=33) and a 464 acre average for land fee simple (n=40) donated for that period—right at a six fold comparative difference between these two land gift types. In the 1985-1989 period, conservation easements (n=53) and land fee simple donations (n=49) indicate a decline in the difference in acre average per donation per year for conservation easements dropping to 2,246 acres. However, for fee simple donations, the average acres per donation increased to 688 acres. In the 1990-1994 period respondents reported a 2,834 acre average for conservation easements donations (n=63) and a 1,622 acre average for land fee simple (n=63) donated for that period. Between the 1980-1984 and the 1990-1994 periods the average
Table XI.6 Fair market value of the five largest land donations made to land trusts between 1990-1994

<table>
<thead>
<tr>
<th>Donations¹</th>
<th>N</th>
<th>Mean</th>
<th>Median</th>
<th>Standard Deviation</th>
<th>Range</th>
</tr>
</thead>
<tbody>
<tr>
<td>a. Largest donation</td>
<td>71</td>
<td>$688,789</td>
<td>$250,000</td>
<td>1,233,644</td>
<td>$3-$2,600,000</td>
</tr>
<tr>
<td>b. 2nd largest donation</td>
<td>64</td>
<td>506,863</td>
<td>176,000</td>
<td>947,363</td>
<td>$1,000-$1,500,000</td>
</tr>
<tr>
<td>c. 3rd largest donation</td>
<td>51</td>
<td>662,031</td>
<td>153,000</td>
<td>1,621,769</td>
<td>$500-$9,000,000</td>
</tr>
<tr>
<td>d. 4th largest donation</td>
<td>40</td>
<td>475,372</td>
<td>159,000</td>
<td>783,595</td>
<td>4,000-$3,470,000</td>
</tr>
<tr>
<td>e. 5th largest donation</td>
<td>36</td>
<td>497,414</td>
<td>207,000</td>
<td>978,710</td>
<td>4,000-$4,400,000</td>
</tr>
</tbody>
</table>

¹ Indicates largest dollar amount in case responses

Figure XI.2 Proportion of four groups' ranges of their fair market value donations in dollars of the total 1990-1994 period of land gift values
number of donated acres of conservation easement donations remained about the same except for the 1985-1989 period where the average donation represented 2,246 acres. Average fee simple acre donations increased steadily from 1980-1989. From 1989 to 1994 the fee simple acreage increased from 688 average acres per donation to 1,622 average acres per donation in 1994—an increase that nearly doubles the donations for the period of 1985-1989.

Table XI.7 presents data reported by the respondents including data for acres donated “as some other interest” as well as fee simple or a conservation easement. These forms of land donations represent a significant number of donated acres. While the thesis topic focused on the motive for giving a fee simple and the conservation easement, the “other interest” land donation may have some of the same aspects as the motives that influenced the land owner’s decision to donate otherwise and should be considered in the future for land donor motivation research.

![Figure XI.3](image)

**Figure XI.3** Average number of acres per conservation easement and fee simple donation in three 5-year periods from 1980-1994 as reported by land trust administrators

9. **QUESTION 49**

Land trust administrators’ opinions for why land donors selected their land trust as the donee

Ninety of 104 respondents answered this question. Numerically itemized responses from each respondents’ written statements were reviewed for a word or word-phrase that would collectively express identifiable opinions. These identifiable opinions were placed within definable categories. An account was kept of the number of times these identifiable opinions were placed in one of these definable categories. Each of the seven was then summed and assigned a percentage based on the total word-phrases itemized (n=131). Figure XI.4 indicates the land trust administrators’ range of perceptions as reasons the land donor selected a land trust as the donee.
Table XI.7  Trends in types of land gifts donated

<table>
<thead>
<tr>
<th>Part 1 Land Gifts</th>
<th>Approximate acres donated for each of these 5-year periods</th>
<th>Period</th>
<th>Sum of All Acreage</th>
<th>N</th>
</tr>
</thead>
<tbody>
<tr>
<td>Conservation Easements</td>
<td>a. 1980-84</td>
<td>93,262</td>
<td>33</td>
<td></td>
</tr>
<tr>
<td></td>
<td>b. 1985-89</td>
<td>119,082</td>
<td>53</td>
<td></td>
</tr>
<tr>
<td></td>
<td>c. 1990-94</td>
<td>178,559</td>
<td>63</td>
<td></td>
</tr>
<tr>
<td>Fee Simple</td>
<td>a. 1980-84</td>
<td>18,550</td>
<td>40</td>
<td></td>
</tr>
<tr>
<td></td>
<td>b. 1985-89</td>
<td>33,698</td>
<td>49</td>
<td></td>
</tr>
<tr>
<td></td>
<td>c. 1990-94</td>
<td>102,183</td>
<td>63</td>
<td></td>
</tr>
<tr>
<td>Some Other Interest</td>
<td>a. 1980-84</td>
<td>2,357</td>
<td>10</td>
<td></td>
</tr>
<tr>
<td></td>
<td>b. 1985-89</td>
<td>9,264</td>
<td>15</td>
<td></td>
</tr>
<tr>
<td></td>
<td>c. 1990-94</td>
<td>44,565</td>
<td>21</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Part 2 Donors' Gift Type</th>
<th>Approximate number of donors that have donated in each of these 5-year periods</th>
<th>Period</th>
<th>Number of Donors</th>
<th>N</th>
</tr>
</thead>
<tbody>
<tr>
<td>Conservation Easements</td>
<td>a. 1980-84</td>
<td>331</td>
<td>35</td>
<td></td>
</tr>
<tr>
<td></td>
<td>b. 1985-89</td>
<td>1,776</td>
<td>54</td>
<td></td>
</tr>
<tr>
<td></td>
<td>c. 1990-94</td>
<td>2,065</td>
<td>66</td>
<td></td>
</tr>
<tr>
<td>Fee Simple</td>
<td>a. 1980-84</td>
<td>557</td>
<td>44</td>
<td></td>
</tr>
<tr>
<td></td>
<td>b. 1985-89</td>
<td>322</td>
<td>53</td>
<td></td>
</tr>
<tr>
<td></td>
<td>c. 1990-94</td>
<td>478</td>
<td>62</td>
<td></td>
</tr>
</tbody>
</table>

10. QUESTION 50

Donors' political position on issues  Donors' political position on issues are indicated through a categorical percentage. Most responses occurred in the 26-50% category while the other percentage categories were negligible. As shown in Table XI.8, within the 26-50% category, middle-of-the-road positions ranked first (78%) followed by the liberal (65%) and then lastly the conservative (61%) positions on issues as perceived by the land trust administrators' perceptions of the land donors' motives and beliefs.
Figure XI.4 Reasons land donors selected a particular land trust as the donee

Table XI.8 Donors' political positions on issues

<table>
<thead>
<tr>
<th>Political Position</th>
<th>Categorical Percentage of Donors</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>0-25</td>
</tr>
<tr>
<td>Middle-of-the-Road</td>
<td>5</td>
</tr>
<tr>
<td>Liberal</td>
<td>28</td>
</tr>
<tr>
<td>Conservative</td>
<td>11</td>
</tr>
</tbody>
</table>
BIOGRAPHICAL SKETCH

Stephen Wesley Goltry was born February 20, 1945, in Chickasha, Oklahoma. He received the Bachelor of Science in Agriculture from Oklahoma State University in 1968 and the Bachelor of Landscape Architecture in 1971 from Kansas State University in 1971. He has been a full member of the American Society of Landscape Architects since 1978. Besides being a certified member of the Council of Landscape Architectural Registration Boards since 1985, he holds professional landscape architectural licenses in Arizona, California, Kansas, New Mexico, and Michigan. Since 1971 he has spent most of his career with multi-disciplinary consulting firms specializing in planning, landscape architecture, architecture, and engineering—especially the Leo A. Daly Company and DeLeuw Cather and Company. In his twenty-five years of professional practice he has planned, designed, and managed numerous projects throughout the United States, the Republic of South Korea, the Kingdom of Saudi Arabia, and the State of Kuwait.