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Coastal Training Market Analysis: Final Report

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Great Lakes

Environmental Finance Center

Cleveland State University

Coastal Training Market Analysis: Survey Results Exclusive of the Responses of the Coastal Training Partners

July 2002



The Urban University Program is a unique network linking the resources of Ohio's urban universities with the communities and students they serve, in a cooperative effort to improve the state's urban regions.



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**ODNR COASTAL TRAINING MARKET ANALYSIS:
ADDENDUM TO SURVEY RESULTS**

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**ODNR COASTAL TRAINING MARKET ANALYSIS:
ADDENDUM TO SURVEY RESULTS**

ODNR COASTAL TRAINING MARKET ANALYSIS: ADDENDUM TO SURVEY RESULTS

BACKGROUND

The Great Lakes Environmental Finance Center (GLEFC) is conducting a market analysis to assist the Ohio Department of Natural Resources (ODNR), Old Woman Creek National Estuarine Research Reserve, and the Ohio Sea Grant College Program in developing a comprehensive training program on coastal resources management for coastal decision-makers. This report is an addendum to the third of four reports to be produced by the Great Lakes Environmental Finance Center (GLEFC) in conjunction with the Coastal Training Market Analysis.

The data from the responses of the coastal training partners sponsoring the Coastal Training Market Analysis were segmented from the original survey results in an effort to measure the impact of the partners' participation on the Ohio Lake Erie basin training market. The data from the remaining training providers are published separately here as an addendum to the original Coastal Training Market Analysis Survey Results report.

This report includes data tabulated from the respondents of the coastal resources management training survey, excluding the responses of the Ohio Department of Natural Resources (ODNR) and its coastal training partners. The coastal training partners are:

- Ohio Department of Natural Resources, Division of Real Estate and Land Management
- Old Woman Creek National Estuarine Research Reserve
- Ohio Sea Grant College Program and its Extension offices, namely
 - ▶ Franz Theodore Stone Laboratory
 - ▶ Greater Cleveland Growth Association
 - ▶ Lake County Extension Office
 - ▶ Lorain County Extension Office
 - ▶ Lucas County Extension Office
 - ▶ Port Clinton Extension
 - ▶ Ohio State University Northeast District
 - ▶ Ohio State University Northwest District

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SUMMARY OF FINDINGS

The survey findings of the Coastal Training Market Analysis was segmented in two ways: (1) the total responses of all survey respondents; and (2) those responses less the responses of the coastal training partners. This report is also a segmented analysis to determine the outcomes of the project without the partners' participation. The coastal training partners were interested in gauging the effect their participation might have on the Ohio Lake Erie basin coastal resources management training market.

A total of 142 organizations responded to the coastal resources management training survey. There were no significant findings or differences noted in the data when the responses of the 12 partners were segmented from that of the other 130 respondents. The segmented results are presented in this report, along with the original survey results for comparison.

The results of the coastal training market analysis defined a market of 50 training providers (of the 142 organizations responding to the survey) servicing the Ohio Lake Erie basin. Of the 50 training providers, 12 are the partners sponsoring this project and 38 are other public, nonprofit, and private entities identified as providing training.

The first two questions concerning organizational structure and employment were posed to the 130 survey respondents. The training questions (beginning with the third question "Training as a Component of the Organization's Mission") reflect the responses of only the 38 training providers.

Section 1: Your Organization

Structure of the Organization

Survey respondents were asked if their organization was a public, private, or not-for-profit organization. As with the original findings, the majority of the survey respondents were public agencies and public agencies provided the majority of coastal resources management training in the Ohio Lake Erie basin (Table 1).

Table 1

TYPE OF ORGANIZATION PROVIDING TRAINING			
<u>Original Survey Results</u>		<u>Segmented Survey Results</u>	
TYPE	PERCENT	TYPE	PERCENT
Public	65%	Public	62%
Private	10%	Private	11%
Nonprofit	25%	Nonprofit	27%

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Employment

The survey candidates were asked to provide the total number of individuals employed by their organization, both full-time and part-time/seasonal workers. The respondents typically employed 10 or fewer full-time and part-time/seasonal workers (Table 2).

Table 2

TOTAL EMPLOYEES		
# EMPLOYEES	Original Survey Results	Segmented Survey Results
0-10	69%	70%
11-50	15%	13%
51-75	0%	0%
76-100	1%	1%
101-150	4%	4%
151-200	1%	2%
>200	8%	9%
No reply	1%	2%

Training as a Component of the Organization's Mission

The training providers responding to the survey were asked to indicate whether:

- Coastal resources management training is the only training provided and the sole purpose of the organization;
- Is one area out of a series of topics for which training opportunities are provided;
- Is not the focus of training, but a few courses are offered on the topic of coastal resources management; or
- Fits into some other element of their organization.

The majority of the survey respondents indicated that coastal resources management training is one of many topic areas in which training is provided (Table 3). Eight percent of the training providers listed other instances where coastal resources management training is included within the mission of their organization:

- When presentations are made to various groups or clients
- The protection of watersheds
- Responsible economic growth
- Economic training, spreadsheets, financial, market development

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Table 3

WHERE TRAINING FITS INTO MISSION OF ORGANIZATION			
Original Survey Results		Segmented Survey Results	
INSTANCE	PERCENT	INSTANCE	PERCENT
Sole Purpose	2%	Sole Purpose	3%
One of Many	58%	One of Many	50%
Not the Focus	32%	Not the Focus	39%
Other	8%	Other	8%

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Section 2: Coastal Resources Management Training Information

Training Courses/Topics

The training providers were asked to list the name, description, and primary location of the three most well attended coastal resources management training courses offered last year by their organizations. The defined market of 50 training providers conducted 104 coastal resources management courses within the past three years. The 12 training partners collectively conducted 30 of the 104 courses, while the other 38 training providers taught 74 of the courses.

Survey respondents who provide training were asked to indicate whether they offered the course(s) once, twice, three, or other times in the past three years. The majority of these courses were offered once within the past year (Table 4).

Table 4

# TIMES COURSES OFFERED		
TIMES OFFERED	Original Survey Results	Segmented Survey Results
1X	38%	36%
2X	12%	15%
3X	18%	16%
Other	32%	32%

The training providers were asked to identify which topics, from a list of 47 choices, are covered in the coastal resources management training courses conducted at their organizations. Training topics *most frequently* identified by the 38 training providers included surface water quality and non-point source pollution, water quantity and quality, conservation and preservation, agricultural uses, riparian corridors, invasive species and biodiversity, and protection of agricultural land (Table 5). The topics identified by these training providers as those *infrequently* covered were beach health, boating pump out, commercial fishing, maritime/science museums, Clean Vessel Act, beach nourishment/sand availability, boating safety, marinas, oil and gas drilling/mineral extraction, and toxic organisms.

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Table 5

TRAINING TOPICS MOST FREQUENTLY COVERED BY PROVIDERS			
<u>Original Survey Results</u>		<u>Segmented Survey Results</u>	
TOPIC	# PROVIDERS	TOPIC	# PROVIDERS
Surface water quality/non-pt source pollution	22	Surface water quality/non-pt source pollution	32
Water quantity/quality	19	Water quantity/quality	29
Conservation/preservation areas	19	Conservation/preservation areas	27
Agricultural uses/plans and livestock	16	Riparian corridors	22
Riparian corridors	15	Invasive species and biodiversity	22
Invasive species and biodiversity	14	Habitat restoration	21
Protection of agricultural land	14		

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Sections 3 & 4: Course Information/Funding

Frequency/Duration of Course Offerings and Number of Training Sessions

The training providers were asked to indicate whether an individual course lasts one hour or less, one to two hours, three to four hours, all day (eight hours), or some other period of time. An additional survey question asked providers to list how many training sessions were conducted in the training course(s) offered by their organizations. The majority of the training courses was offered once in the past three years and was chiefly conducted for an eight-hour day, with one training session held per course (Table 6).

Table 6

COURSE TIMES		
DURATION OF COURSE(S)	Original Survey Results	Segmented Survey Results
1 hr or less	12%	8%
1-2 hours	11%	12%
3-4 hours	17%	19%
All day	34%	30%

Course Participation, Instruction, and Instructors

The respondents who provide training were asked to indicate whether 10 or fewer, 11 to 50, 51 to 75, or more than 75 participants typically enroll in their course(s). Typical attendance for the courses ranged from 11 to 50 individuals (Table 7).

These respondents were asked to list the methods used by the instructors when conducting a course, and were given choices of lecture format, seminars, workshops, interactive/focus group approaches, accelerated learning, simulations, professional conferences, Internet/web-based approaches, and field experience, or to list another method not included on the questionnaire. The training providers were also asked to identify the types of instructors conducting the courses and the percentage that these instructors were utilized. The selections were in-house staff, hired consultants, and volunteers.

Volunteers using a lecture method taught the majority of the courses, while staff members and employees of the organizations taught a large portion of the courses. Methods infrequently used by instructors of training programs were accelerated learning, simulation, and Internet/web-based approaches. Other teaching methods listed by training providers included video conferencing, PowerPoint presentations, exhibits, demonstrations, case studies, and hands-on experience (Table 7)

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Table 7

COURSE PARTICIPATION			TYPES OF INSTRUCTORS		
# PARTICIPANTS	<u>Original Survey Results</u>	<u>Segmented Survey Results</u>	TYPE	<u>Original Survey Results</u>	<u>Segmented Survey Results</u>
10 or fewer	6%	8%	In-house staff	62%	36%
11-50	63%	58%	Consultants	16%	26%
51-75	11%	11%	Volunteers	22%	38%
>75	21%	23%			

The training providers were asked to specify the level of education possessed by the instructors teaching the courses offered by their organizations. Selections included doctorate/professional degree, master's degree or equivalent, bachelor's degree, associate degree, professional certification, no college degree, or other. The majority of the course instructors have earned bachelor's and master's degrees (Table 8). A number of training providers also indicated that their instructors possessed doctorate/professional degrees. A small number of instructors were professionally certified, while a few had associate degrees or no college degree.

Table 8

TEACHING METHODS			EDUCATION LEVEL OF INSTRUCTORS		
METHOD	<u>Original Survey Results</u>	<u>Segmented Survey Results</u>	EDUCATION LEVEL	<u>Original Survey Results</u>	<u>Segmented Survey Results</u>
Lecture	48	48	Ph.D.	42	26
Seminar	16	16	Master's	68	40
Workshop	35	35	Bachelor's	54	42
Focus group	16	16	Associate's	8	8
Accelerated learning	3	3	Professional certification	13	12
Simulation	3	3	None	9	4
Professional conference	12	12	Other	1	0
Internet/web	3	3			
Field experience	23	23			
Other	3	3			

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Course Completion/Costs/Funding

The training providers were asked to specify what they provided to participants who successfully completed their courses. Choices were academic credits, credits for continuing education, certificates of participation, professional development, educational/training materials, or other. Survey respondents providing training were asked to estimate the fees and/or costs incurred by participants who enrolled in the 74 courses. Choices of estimates were designated as no cost, \$100 or less, \$101-\$200, \$201-\$300, \$301-\$400, \$401-\$500, or over \$500. For the most part, training providers offer coastal resources management training courses at no cost to participants (Table 9), who receive educational and training materials upon course completion (Table 9).

Participants also received certificates of participation, professional development, and credits for continuing education when successfully completing courses offered by training providers. Few training providers offered academic credits for individuals successfully completing the courses. Training providers cited other offerings upon course completion as course summaries, equipment, and further consultation.

Table 9

PROVIDED TO COURSE PARTICIPANTS			PARTICIPANTS' COSTS		
OFFERNG	<u>Original Survey Results</u>	<u>Segmented Survey Results</u>	COST	<u>Original Survey Results</u>	<u>Segmented Survey Results</u>
Academic credits	7	7	No cost	52%	42%
Continuing education credits	18	15	\$100 or less	33%	41%
Certificates of participation	41	35	\$101-\$200	8%	8%
Professional development	27	20	\$201-\$300	3%	3%
Educational materials	80	51	\$301-\$400	2%	3%
Other	4	3	\$401-\$500	0%	0%

The survey respondents who provide training were asked to identify the largest item and cost associated with providing the 74 coastal resources management training courses offered last year by their organizations. The training providers were also asked to specify how coastal resources management training opportunities were funded at their organizations, whether through tuition or fees, general operating budgets, grants from public or private institutions, loans from outside sources, philanthropy/donations, or some other venue. The majority of the training providers fund the courses through general operating budgets, with salaries for staff and speakers cited as their major expense (Table 10).

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Table 10

HIGHEST COST ITEMS OF TRAINING PROVIDERS			FUNDING SOURCES		
COST ITEMS	<u>Original Survey Results</u>	<u>Segmented Survey Results</u>	FUNDING SOURCES	<u>Original Survey Results</u>	<u>Segmented Survey Results</u>
Salaries	1 st	1 st	Tuition	27	23
Transportation/travel	2 nd	2 nd	General operating budget	36	27
Meals/refreshments	3 rd	3 rd	Grants	29	21
Materials	4 th	4 th	Loans	0	0
Advertising/marketing	5 th	5 th	Donations	15	11
Facilities	6 th	6 th	Other	6	4
Scholarships	7 th	7 th			

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Section 5: Target Audiences

Target Audiences/Marketing Techniques

The training providers responding to the survey were asked to specify the types of audiences targeted by their organizations when providing coastal resources management training. Selections were academic community, consultants/consultant groups, contractors, corporations/firms, county commissioners, elected officials/candidates, federal government employees, health department employees, land use planners, legislators, local government employees, not-for-profit organizations, port authorities/commissioners, science community, state government employees, or other. When tabulating the results, county commissioners and legislators were counted as elected officials. The providers primarily market their training courses to elected officials and candidates (including county commissioners and legislators). See Table 11 below.

Table 11

TYPES OF AUDIENCES TARGETED BY TRAINING PROVIDERS			
<u>Original Survey Results</u>		<u>Segmented Survey Results</u>	
AUDIENCE TARGETED	RANKING	AUDIENCE TARGETED	RANKING
Elected officials/candidates	1	Elected officials/candidates	1
Local government employees	2	Local government employees	2
State government employees	3	State government employees	3
Not-for-profit organizations	4	Consultants/consultant groups	4
Consultants/consultant groups	5	Land use planners	5
Land use planners	5	Not-for-profit organizations	6
Other	6	Other	6
Federal government employees	7	Federal government employees	7
Academic community	8	Academic community	7
Science community	9	Contractors	8
Contractors	10	Corporations/Firms	9
Corporations/Firms	10	Science community	9
Health department employees	11	Health department employees	10
Port authorities/commissioners	12	Port authorities/commissioners	11

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The training providers responding to the survey also listed a number of other audiences targeted to participate in coastal resources management courses. These audiences include:

- Boaters
- Citizen environmental groups
- Citizens
- Developers
- Environmental educators
- Farmers
- General public
- Grant funded communities
- In-house staff
- Labor unions
- Landowners
- Lawyers
- Local community
- Media
- Neighborhoods/households
- Real estate officials
- Recreational divers
- Regional and international commissions
- Resource users
- Solid waste districts
- Students
- Tourism officials
- Watershed landowners
- Zoning officials

The training providers were asked to indicate how potential participants learn about the training opportunities offered by their organizations. The selections listed on the questionnaire were direct mail campaigns, email lists, marketing done by co-sponsors/partners, newspaper advertisements, organizational newspapers, organizational website, press releases, telephone solicitations, television/public service announcements, or other. These providers chiefly used direct mail campaigns and organizational newsletters as the vehicles to attract course participants (Table 12).

Table 12

MARKETING TECHNIQUES			
<u>Original Survey Results</u>		<u>Segmented Survey Results</u>	
TECHNIQUE	RANKING	TECHNIQUE	RANKING
Direct mail campaign	1	Direct mail campaign	1
Organizational newsletters	2	Organizational newsletters	1
Press releases	3	Press releases	2
Email lists	4	Email lists	3
Marketing done by cosponsors/partners	5	Marketing done by cosponsors/partners	4
Organizational website	5	Organizational website	4
Other	6	Other	5
Newspaper advertisements	7	Newspaper advertisements	6
Telephone solicitations	8	Telephone solicitations	7
Television/public service announcements	9	Television/public service announcements	8

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The training providers responding to the survey also listed a number of additional techniques used to market coastal resources management training opportunities. These techniques include:

- Boat shows
- Brochures with perforated mailings
- Diving instructors and equipment dealers
- Door-to-door neighbor introduction
- In-house training programs
- Organizational mailings
- Posters at colleges
- Presentations at meetings
- Radio advertisements
- Radio public service announcements
- Word of mouth

Target Audiences/Marketing Techniques (By Sector)

When segmented by sector, the public, nonprofit, and public university sector training providers marketed courses to elected officials and candidates (including county commissioners and legislators). Public universities also targeted nonprofit organizations and the science community. Direct mail campaigns and organizational newsletters were utilized by the public sector to market training information, while the nonprofit organizations most often conveyed training information through press releases and with the assistance of co-sponsors and partners. Public universities primarily utilized direct mail campaigns, email lists, organizational newsletters, and web sites to convey training information to their audiences. Refer to Table 13 for details.

Private sector training providers largely seek consultants and consultant groups, corporations and firms, elected officials and candidates (including county commissioners and legislators), land use planners, local and state government employees, and nonprofit organizations as audiences for their courses. These training providers mostly utilized direct mail campaigns in addition to email lists and co-sponsors or partners to market course information.

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Table 13

TYPES OF AUDIENCES TARGETED BY SECTOR				
Original Survey Results			Segmented Survey Results	
SECTOR	AUDIENCE	RANKING	AUDIENCE	RANKING
<i>Public</i>	Elected officials/candidates	1	Elected officials/candidates	1
	Local government employees	2	Local government employees	2
	State government employees	3	State government employees	3
	Consultants/consultant groups, Land use planners	4	Consultants/consultant groups	4
	Federal government employees, Not-for-profit organizations	5	Land use planners	5
	Other	6	Federal government employees, Not-for-profit organizations	6
	Academic community	7	Other, Academic community	7
	Contractors	8	Contractors	8
	Science community	9	Science community, Corporations/firms, Health department employees, Port authorities/commissioners	9
	Corporations/firms, Health department employees	10		
	Port authorities/commissioners	11		
<i>Nonprofit</i>	Elected officials/candidates	1	Elected officials/candidates	1
	Local government employees	2	Local government employees	2
	Consultants/consultant groups, Land use planners, Other	3	Consultants/consultant groups, Land use planners, Other	3
	Academic community, Science community, State government employees	4	Academic community, Science community, State government employees	4
	Contractors, Not-for-profit organizations	5	Contractors, Not-for-profit organizations	5
	Corporations/firms, Federal government employees, Health department employees	6	Corporations/firms, Federal government employees, Health department employees	6
	Port authorities/commissioners	7	Port authorities/commissioners	7

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Table 13 continued

TYPES OF AUDIENCES TARGETED BY SECTOR (continued)				
Original Survey Results			Segmented Survey Results	
SECTOR	AUDIENCE	RANKING	AUDIENCE	RANKING
<i>Private</i>	Consultants/consulting groups, Corporations/firms, Elected officials/candidates, Land use planners, Local government employees, Not-for-profit organizations, State government employees	1	Consultants/consulting groups, Corporations/firms, Elected officials/candidates, Land use planners, Local government employees, Not-for-profit organizations, State government employees	1
	Contractors, Federal government employees, Other	2	Contractors, Federal government employees, Other	2
	Academic community, Health department employees, Port authorities/commissioners, Science community	3	Academic community, Health department employees, Port authorities/commissioners, Science community	3
<i>Universities</i>	Elected officials/candidates	1		
	Not-for-profit organizations, Science community	2		
	Academic community, Local government employees, State government employees, Other	3		
	Federal government employees, Land use planners	4		
	Corporations/firms	5		
	Consultants/consultant groups, Health department employees	6		
	Contractors, Port authorities/commissioners	7		

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The public, nonprofit, private, and public university sectors each utilize different techniques to market coastal resources management training courses to potential audiences (Table 14). Public agencies primarily used organizational newsletters and direct mail campaigns to market training information to potential course participants, and infrequently utilized telephone solicitations or television/public service announcements. Other marketing techniques (in addition to the survey selections) cited as being utilized by public agencies to market training opportunities were organizational mailings, in-house training programs, boat shows, word-of-mouth, and radio public service announcements and advertisements.

Nonprofit organizations most often utilized press releases and co-sponsors or partners to market to potential course participants, but infrequently utilized newspaper advertisements and television/public service announcements as vehicles to market information. The nonprofit organizations cited, in addition to the survey selections, other methods for marketing to potential audiences, such as door-to-door neighbor introduction, diving instructors and equipment dealers, and brochures with perforated mailings.

The private companies responding to the survey utilized direct mail campaigns, email lists, and co-sponsors or partners to market training opportunities, but didn't cite newspaper advertisements, telephone solicitations, or television/public service announcements as techniques to attract potential audiences. The private sector training providers additionally listed word-of-mouth as a technique used to market courses.

Table 14

MARKETING TECHNIQUES BY SECTOR				
Original Survey Results			Segmented Survey Results	
SECTOR	TECHNIQUE	RANKING	TECHNIQUE	RANKING
<i>Public</i>	Direct mail campaigns	1	Organizational newsletters	1
	Organizational newsletters	2	Direct mail campaigns	2
	Press releases	3	Press releases	3
	Email lists	4	Email lists, Organizational website	4
	Marketing done by co-sponsors/partners, Organizational web site	5	Marketing done by co-sponsors/partners	5
	Newspaper advertisements	6	Newspaper advertisements	6
	Other	7	Other	7
	Telephone solicitations	8	Telephone solicitations	8

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Table 14 continued

MARKETING TECHNIQUES BY SECTOR (continued)				
Original Survey Results			Segmented Survey Results	
SECTOR	TECHNIQUE	RANKING	TECHNIQUE	RANKING
<i>Nonprofit</i>	Marketing done by co-sponsors/partners, Press releases	1	Marketing done by co-sponsors/partners, Press releases	1
	Direct mail campaigns, Email lists, Organizational web site	2	Direct mail campaigns, Email lists, Organizational web site	2
	Organizational newsletters, Other	3	Organizational newsletters, Other	3
	Telephone solicitations	4	Telephone solicitations	4
	Newspaper advertisements	5	Newspaper advertisements	5
	Television/public service announcements	6	Television/public service announcements	6
<i>Private</i>	Direct mail campaigns, Email lists, Marketing done by co-sponsors/partners	1	Direct mail campaigns, Email lists, Marketing done by co-sponsors/partners	1
	Organizational newsletters, Organizational web site, Press releases, Other	2	Organizational newsletters, Organizational web site, Press releases, Other	2
	Newspaper advertisements, Telephone solicitations, Television/public service announcements	3	Newspaper advertisements, Telephone solicitations, Television/public service announcements	3
<i>Universities</i>	Direct mail campaigns, Email lists, Organizational newsletters, Organizational web site	1		
	Press releases	2		
	Marketing done by co-sponsors/partners, Other	3		
	Newspaper advertisements, Telephone solicitations, Television/public service announcements	4		

ODNR COASTAL TRAINING MARKET ANALYSIS: ADDENDUM TO SURVEY RESULTS

Section 6: The Training Environment and Other Organizations

Training Disparities

The survey respondents were asked if they could identify any gaps in coastal resources management training in Ohio, such as unmet training needs, audiences, timing, and length of training. The survey respondents listed what they perceived to be the disparities in Ohio's coastal resources management training programs. These disparities or "gaps" are divided into seven thematic categories:

- Coordination
- External/Internal Marketing and Promotional Assistance
- Funding
- Instructional Quality/Nature of Training
- Regulatory/Safety/Security

The survey results indicated that issues relevant to instructional quality and the nature of training are noted as the primary "gaps" in coastal resources management training. Other disparities identified by training providers responding to the survey were issues of external/internal marketing and promotional assistance, coordination, funding, and regulatory/safety/security concerns.

Assistance to Benefit Training Providers

The Ohio Department of Natural Resources (ODNR) and its partners are interested in forming partnerships with a variety of coastal resources management training providers. The survey respondents were asked to rank from one to six the types of assistance from ODNR and its partners that would be most beneficial to them, with one being the most beneficial, two the second most beneficial, and so forth. The types of assistance listed as choices are facilities and operational support, funding support, instructor/trainers, marketing assistance, professional expertise/technical assistance, and other. The top three rankings of the responses from 38 of the 50 training providers are being reported because many respondents ranked only their top three choices. Excluded from the results are ODNR and its CTI partners.

The survey results indicated that the majority of the survey respondents ranked funding support as the type of assistance that would be most beneficial, marketing assistance as the type of assistance that would be second most beneficial, and instructor/trainers and facilities and operational support as the type of assistance that would be third most beneficial.

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