

Great Lakes

Environmental Finance Center

Cleveland State University

Coastal Training Market Analysis: Survey Results

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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.



Maxine Goodman Levin College of Urban Affairs
Cleveland State University
1717 Euclid Avenue
Cleveland, OH 44115

ODNR COASTAL TRAINING MARKET ANALYSIS

The Great Lakes Environmental Finance Center (GLEFC) is conducting a market analysis to assist the Ohio Department of Natural Resources (ODNR) and its partners (Old Woman Creek National Estuarine Research Reserve and the Ohio Sea Grant College Program) in developing a comprehensive training program on coastal resources management. This analysis will identify the suppliers – the hosts, providers, institutions, and instructors – of Ohio’s coastal training and education market. The analysis will demonstrate ODNR and its partners’ relationship to this market through an inventory and analysis of the range, scope, and delivery systems of current coastal training programs and service providers within the state.

This is the third of four reports to be produced by the GLEFC project team in conjunction with the project. This report outlines the survey methodology and survey results of the Coastal Training Market Analysis.

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SURVEY METHODOLOGY

The main objective guiding the methodological approach was to generate the greatest participation possible because of limited knowledge of the field. The methodology for the project was structured to answer the following research questions:

- 1) Who are the primary providers of coastal resources management training in the State of Ohio? and
- 2) What relevant factors are we interested in measuring when assessing the current training environment?

The literature review and best practices scan found that a limited number of projects have been undertaken to assess the coastal resources management training environment in Ohio, while a decent number of training programs exist nationally. It follows that since this type of training has received meager treatment in Ohio, the project approach would need to be driven by the necessity for collecting primary data from which generalizations can be drawn.

Approach to Data Collection

The GLEFC utilized a phone survey as the data collection instrument for this study. We expected to identify a pool of actual providers of coastal resources management training from a larger population group consisting of coastal resources management professionals. To ensure the accuracy of the results, the response rate of the sample needed to approximate the actual number of training providers as closely as possible to offset the potential for error that is inherent when assessing small sample sets. The questionnaire was designed to factor out non-training providers (after collecting the essential background information on location, mission, etc.) to generate an analysis of the training environment exclusive of practitioners in the field. Also, we assumed that the information being measured is not time sensitive, and would remain relatively constant over a period of time. For instance, significant changes to the organizational location, mission, course offerings, and so forth most likely would not occur in the short-term, and are instead a product of procedural and policy decisions made internally, with some exogenous influences over the long-run.

A cover letter was designed to accompany the survey questionnaire to summarize the project, discuss the importance of the study, and outline the survey process. It also clarified several terms utilized in the survey that could have potentially resulted in misinterpretation. A copy of the cover letter utilized for the three groups of the survey is contained in Appendix A.

The survey was conducted with three separate waves. The response rates for each wave are provided in the results section of this report. All respondents were initially contacted by telephone for each wave, at which time a brief verbal introduction

on the purpose of the project was provided, and their willingness to participate was confirmed. Respondents were informed that the cover letter and survey questionnaire would be sent to their attention via facsimile or electronic mail (their preference).

The first wave of respondents was sent a cover letter and questionnaire. A day and time was scheduled which they would be available to answer the questions in a telephone interview. These telephone interviews were conducted by the GLEFC project team. All interviewers were provided with survey training for administering the telephone interview. Several “practice sessions” were simulated, and a pre-test was conducted before initiating the telephone interviews to maintain instrument reliability and validity. An example of the telephone interview questionnaire is included in Appendix B.

For the subsequent two waves, we sent the same questionnaire to respondents, but requested that they enter the information manually and return it to us by a specified date via facsimile or electronic mail. This phase included the remainder of the sample.

Overview of the Survey Questionnaire Design

The foundation of the survey questionnaire was built upon two broad objectives: 1) To gather factual information on each training provider from which we could build a reliable database that contains input on the location, size, primary contact, and mission of the organization; 2) To identify a series of factors that were instrumental in measuring the scope of coastal resources management training, and methodically marshal information together that analyzes the nature, topics, content, target audiences, etc. of the courses. A reproduction of the survey questionnaire is contained in Appendix C.

When designing the questionnaire, we utilized a combination of open and closed ended questions. This allowed us to structure the content of the survey instrument, which simultaneously availed respondents of the opportunity to elaborate on their responses and add relevant information at designated points in the process.

Consequently, the questionnaire was partitioned into a series of sections. Section 1 was designed to gather organization-specific information pertaining to provider location, number of employees, and mission. This section satisfied objective number one above. The remaining sections satisfied objective number two above - identifying and measuring discrete aspects of coastal resources management training within the sample organization. Section 2 asked respondents to specify which topics, from a list of 47 choices blanketing the spectrum, are covered at their organization. We provided one choice titled "other" for respondents to add a potential topic not supplied in the list. Section 3 was designed to gather micro-level data on the three most well-attended coastal resources management training courses offered by the respondent's organization in the last year. For each of the three courses, we asked respondents questions on course duration, time of offering, location, training methods, background of

instructors, and cost(s) for enrollment. This generated specific case study data for a cross-section of the training courses offered at each organization. Section 4 questioned providers about funding sources for training opportunities offered at their organization. Section 5 measured target audience segments the respondent's organization draws upon when generating potential enrollees in the training courses and the method in which information on the offerings is relayed to a potential audience. Finally, Section 6 asked respondents about the training environment with an open-ended question that canvassed their perceptions of the major “gaps” in coastal resources management training in Ohio. An accompanying question listed for consideration six types of assistance that would be most beneficial to the respondent's organization and asked them to rank the categories in order of importance.

We concluded the survey by requesting that respondents mail any coastal resources management training and course descriptions to the GLEFC at Cleveland State University. We also provided instructions for returning the completed survey questionnaire to us via facsimile to quickly expedite the process. A complete database of survey candidates is included in Appendix D of this report.

Framing the Results

The survey questionnaire was designed to produce primary and original data on the coastal resources management training environment. The data generated from this effort was analyzed using descriptive statistical techniques and frequency distributions and is displayed in the next section of this report through a series of matrices, GIS maps, graphs, and tables. We found that descriptive statistics provided the most appropriate answer to our research questions by introducing percentages of occurrence. We also framed the results to reflect those respondents identifying themselves as training providers as the primary data considered in the analysis.

RESULTS OF THE SURVEY

This section summarizes the results of the survey questionnaire distributed to a pool of potential providers of coastal resources management training programs conducted in the Ohio Lake Erie basin. The survey questionnaire was sent to each of the 190 total respondents identified as the population group. Of the number surveyed, 142 answered the questionnaire for a 75 percent response rate. Table 1 below summarizes this frequency distribution.

BREAKDOWN OF SURVEY RESPONSES

Table 1

Group	Number	Percentage*
Total number surveyed	190	100%
Number of responses	142	75%

**As a percentage of responses*

Summary of Findings

The majority of the survey respondents were public agencies that provide coastal resources management training in the Ohio Lake Erie basin. The respondents (including training providers) typically employ 50 or fewer full-time and part-time/seasonal workers.

Coastal resources management training is not the focus of training offered by these organizations; rather, it is one of many topic areas for which training is provided. The topic areas most frequently included in coastal resources management training focus on surface water quality and non-point source pollution, water quantity and quality, conservation and preservation, riparian corridors, invasive species and biodiversity, and habitat restoration.

More than 100 coastal resources management courses were offered in the past year in the Ohio Lake Erie basin, with the majority of these courses being offered only once within the past three years. These courses are chiefly conducted for an eight-hour day, with one training session being held per course. Typical attendance for the training courses ranges from 11 to 50 individuals. The majority of the courses were taught using a lecture method by staff members and employees of the organization. A large portion of the course instructors have earned bachelor's and master's degrees.

For the most part, training providers offer coastal resources management training courses at no cost to participants, who receive educational and training materials upon course completion. The majority of the training providers fund the courses through

general operating budgets, with salaries for staff and speakers cited as their major expense.

The providers primarily market their training courses to elected officials and candidates (including county commissioners and legislators). These providers chiefly use direct mail campaigns as the vehicle to attract course participants.

Public sector training providers market courses to elected officials and candidates (including county commissioners and legislators). Direct mail campaigns and organizational newsletters are utilized by the public sector to market training information.

Nonprofit organizations primarily target elected officials and candidates (including county commissioners and legislators) to attend their courses. These organizations most often convey training information through press releases and with the assistance of co-sponsors and partners.

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 utilize direct mail campaigns in addition to email lists and co-sponsors or partners to market course information.

The majority of the audiences targeted by public universities were elected officials, nonprofit organizations, and the science community. Public universities primarily utilized direct mail campaigns, email lists, organizational newsletters, and websites to convey training information to these audiences.

The training providers identified issues relevant to instructional quality and the nature of training as what they perceived to be “gaps” or disparities in existing Ohio coastal resources management training programs. The providers stated that their training programs could benefit from some type of fiscal support from ODNR and its partners.

The Survey Process

The results of the survey process are a product of three separate waves of surveys conducted by the GLEFC project team. Telephone interviews to 35 individuals, representing fundamental state and federal agencies comprised the first group of the survey process. The respondents for this first wave were identified by the GLEFC project team with the assistance of ODNR and its partners. Telephone interviews were conducted between December 10, 2001 and January 11, 2002. To prepare for the telephone interview, respondents were faxed the survey questionnaire prior to the

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interview. All 35 survey candidates responded to the telephone interviews for a 100 percent response rate. Of the 35 candidates interviewed, 89 percent identified themselves as providers of coastal management training programs.

The second wave of surveys was conducted by facsimile and electronic mail to 64 Soil and Water Conservation District and National Resources Conservation Service agencies identified through an exhaustive review of the literature. Surveys for this second wave were conducted from January 14-31, 2002. Of the 64 candidates surveyed, 67 percent responded. Analysis of this cohort indicated that only 14 percent of the sample offered coastal resources management training.

The third wave of surveys was likewise conducted by facsimile and electronic mail. This wave consisted of 91 candidates from private sector companies and public sector and not-for-profit agencies and organizations. The respondents from this wave were identified from a review of the literature and from referrals generated by question number 27 answered by respondents on the survey questionnaire. Recommendations by other professionals and organizations were also examined. These surveys were conducted from February 1-22, 2002. Of the 91 candidates surveyed, 70 percent responded, with 20 percent identifying themselves as providers of coastal resources management training. Table 2 below summarizes the response rates and percentages of those providing training for each wave.

RESULTS OF SURVEY PROCESS

Table 2

Wave	# Interviewed	Response Rate	% Providing Training
First	35	100%	89%
Second	64	67%	14%
Third	91	70%	20%

The Survey Questionnaire

Section 1: Your Organization

The survey candidates were asked to supply the following information in questions 1 through 4 of the questionnaire:

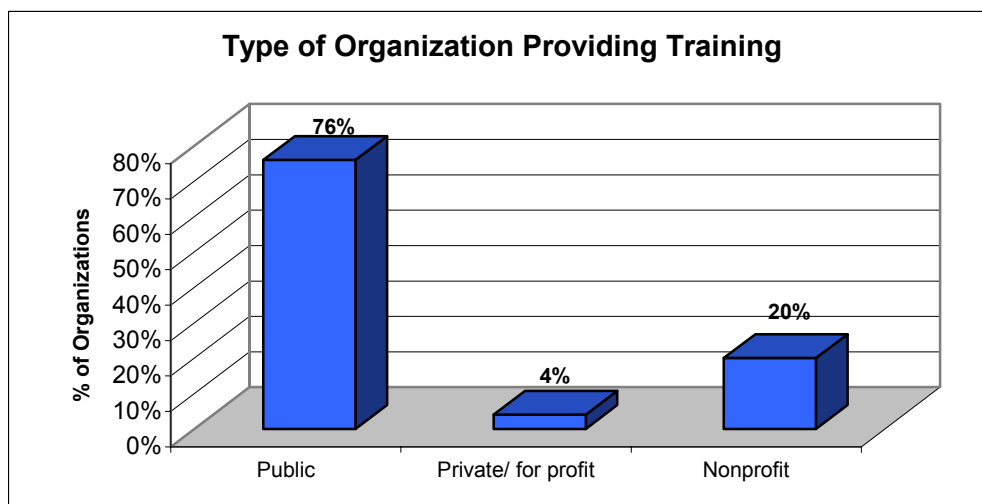
- Name of the organization
- Official address, telephone number, website address, email address
- Name, title, telephone number of person responsible for overseeing training offered for coastal resources management courses
- Name, title, telephone number of individual being interviewed or completing the survey

Structure of the Organization

Survey candidates were asked if their organization was a public, private or not-for-profit organization. The majority of the candidates responding to the survey were public agencies. These public agencies were also the primary training providers of coastal resources management in the Ohio Lake Erie basin. Private companies in the Ohio Lake Erie basin infrequently provide coastal resources management training opportunities.

Figure 1 below shows that of the 142 respondents, 50 offered training in the field of coastal resources management. Seventy-six percent of the 50 training providers were public entities, 20 percent were not-for-profit organizations, and four percent were private companies.

Figure 1

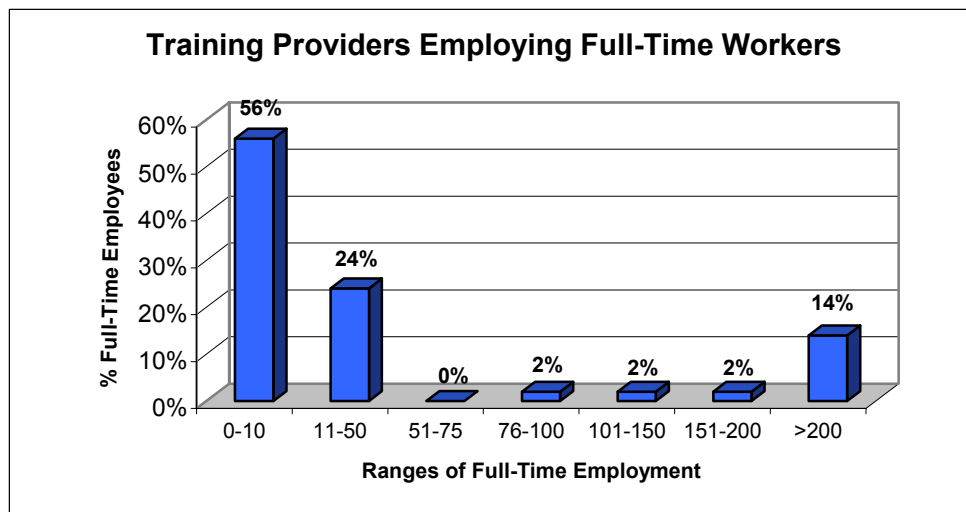


Employment Structure of the Organization

The survey candidates were asked to provide the total number of individuals employed by their organization, both full-time and part-time/seasonal workers. Organizations responding to the survey primarily employ 50 or fewer full-time and part-time/seasonal workers.

Figure 2 shows that the majority of the 50 training providers employ 50 or fewer full-time workers. Eighty percent of those providing training employ 50 or fewer full-time workers, while 56 percent employ 10 or fewer individuals on a full-time basis. A total of 24 percent of the training providers employ 10 or fewer workers on a part-time/seasonal basis.

Figure 2



Training as a Component of the Organization's Mission

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 50 training providers indicated that coastal resources management training is one area out of a series of topics for which training opportunities are provided by the organization. Fifty-eight percent stated that coastal

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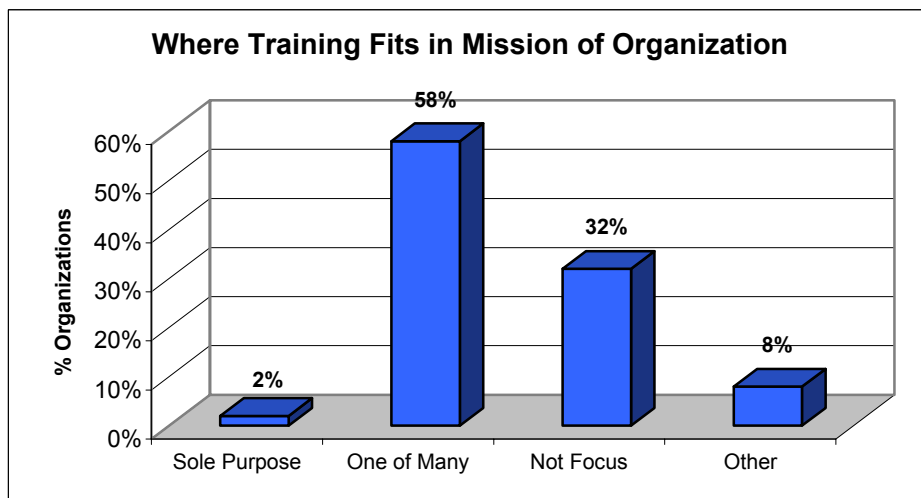
resources management training is one area out of a series of topics, 32 percent indicated that coastal resources management training is not the focus of training but offer a few courses on this topic, and two percent cited coastal resources management training as the only training provided and the sole purpose of the organization.

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

Figure 3 below depicts the responses of the training providers as to where coastal resources management training fits into the mission of their organization.

Figure 3



Section 2: Coastal Resources Management Training Information

Training Topics

The 50 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. The six topics covered *most frequently* by training providers are outlined in Table 3 below.

TRAINING TOPICS MOST FREQUENTLY COVERED BY PROVIDERS

Table 3

Topic	# Providers
Surface water quality/non-point source pollution	32
Water quantity/quality	29
Conservation/preservation areas	27
Riparian corridors	22
Invasive species and biodiversity	22
Habitat restoration	21

The six topics identified by training providers as those *infrequently* covered in the coastal resources management training courses at their organizations are outlined in Table 4 below.

TRAINING TOPICS INFREQUENTLY COVERED BY PROVIDERS

Table 4

Topic	# Providers
Beach health	6
Boating pump out	5
Clean Vessel Act and issues	6
Commercial fishing	6
Maritime/science museums	5
Oil and gas drilling/mineral extraction	5

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The training providers listed several other topic areas covered in coastal resources management training at their organizations:

- Agricultural and urban erosion control
- Alternative zoning
- Artificial reef development
- Board development
- Buying recycled products
- Capacity building
- Coastal consistency
- Conservation/development practices
- Cultural resources management
- Dam removal
- Disaster issues
- Enforcement – illegal dumping
- Fishing
- Fundraising
- General Lake Erie ecology
- Sportsfish and game consumption advisories
- Storm water management
- Strategic planning
- Stream flow restoration
- Hunting/hunter safety
- Ice breaking
- Inland wetlands
- Land protection
- Litter prevention
- Natural landscapes
- Navigation
- Oil and chemical spills
- Operation and maintenance of treatment facilities
- Public ownership of lake waters and streams
- Recycling
- Refuge management
- Research briefings
- Scuba diving
- Search and rescue security
- Toxic pollutants
- Underwater preserves and submerged land issues
- Waterfowl/marshes
- Watershed group development

Appendix F contains a detailed matrix of the topics covered by providers of coastal resources management training.

Section 3: Course Information

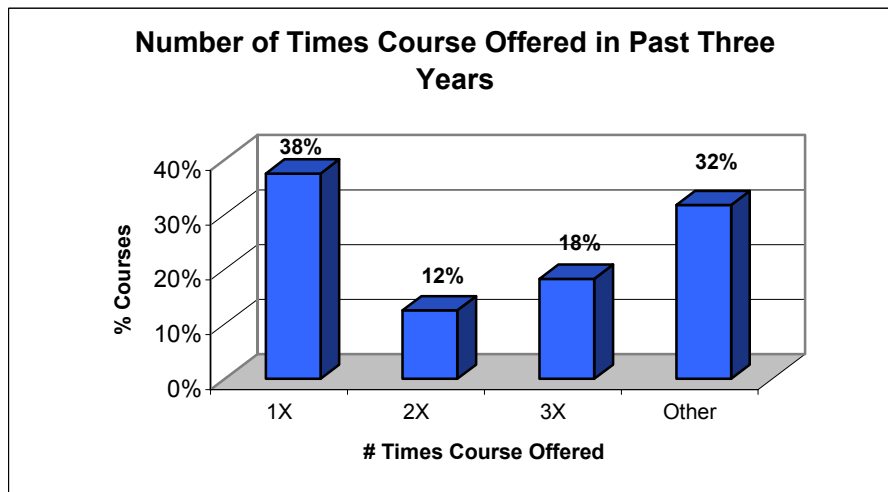
Training Courses and Locations

The training providers responding to the survey 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 organization. The 50 respondents who provide training cited a total of 104 courses conducted within the last year in the area of coastal resources management training, held in 41 of Ohio's 88 counties. The matrix in Appendix G provides a detailed listing of courses offered.

Frequency of Course Offerings

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 the respondents only offered the course once in the past three years. Thirty-eight percent of the 104 courses offered were only conducted once in a three-year period, while 32 percent were offered more than three times ("other") in three years. Eighteen percent of the courses are offered three times in a three-year period, and 12 percent of the courses are offered twice. Other times noted were 5, 6, 7, 10, 12, 15, 20, 25, 36, 40, and 443 times within the past three years. Figure 4 displays the number of times training providers offered courses within the past three years.

Figure 4

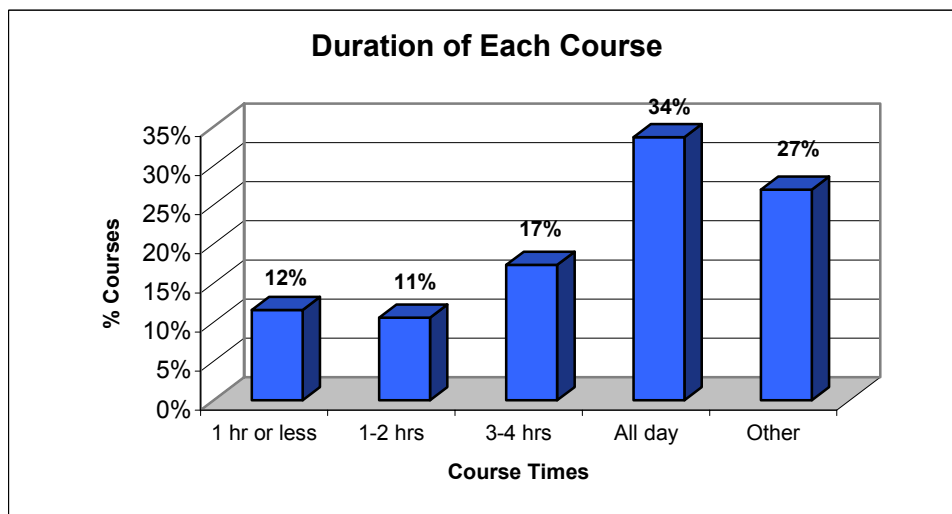


Duration of Course Offerings

The respondents who provide training 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. The survey results indicated that the majority of the respondents conducted courses lasting all day (eight hours).

Of the 104 courses, 34 percent were offered for the duration of eight hours (all day), while 27 percent of the courses were conducted for time periods other than the choices offered. Seventeen percent of the 104 courses were offered for three to four hours, 12 percent were offered for one hour or less, and 11 percent were conducted for one to two hours. Other time periods listed were 1½, 2, 3, 4, and 5 days. These results are graphically depicted in Figure 5 below.

Figure 5



Number of Training Sessions

Training providers responding to the survey were asked to list how many training sessions were conducted in the training course(s) offered by their organizations. The majority of the respondents providing training conducted one training session per course. The average number of training sessions conducted among the 104 courses was two, while the most frequent number of training sessions conducted was one. Table 5 below reflects the frequencies of the training sessions offered per course.

TRAINING SESSIONS OFFERED PER COURSE

Table 5

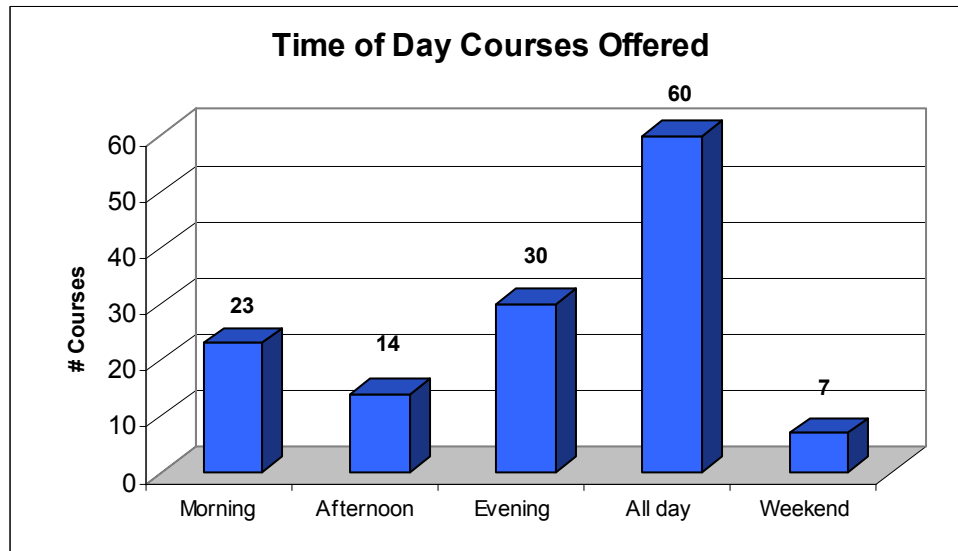
#Courses	#Sessions
1	0
82	1
4	2
2	3
3	4
3	5
1	6
1	8
1	9
3	10
2	12
1	16

Time Courses Offered

Training providers were asked to indicate the time of day the course(s) is most frequently offered. Choices were mornings (until noon), afternoons (noon to 5 p.m.), evenings (5 p.m. or later), all day (8 hours), or weekends. The survey results indicated that the majority of the 104 courses offered by the training providers were eight-hour courses (all day).

Training providers also conducted evening (5 p.m. or later) and morning (until noon) courses. Few training providers conducted afternoon (noon to 5 p.m.) or weekend courses. Figure 6 below depicts the times of day the courses were most frequently conducted by the training providers responding to the survey.

Figure 6

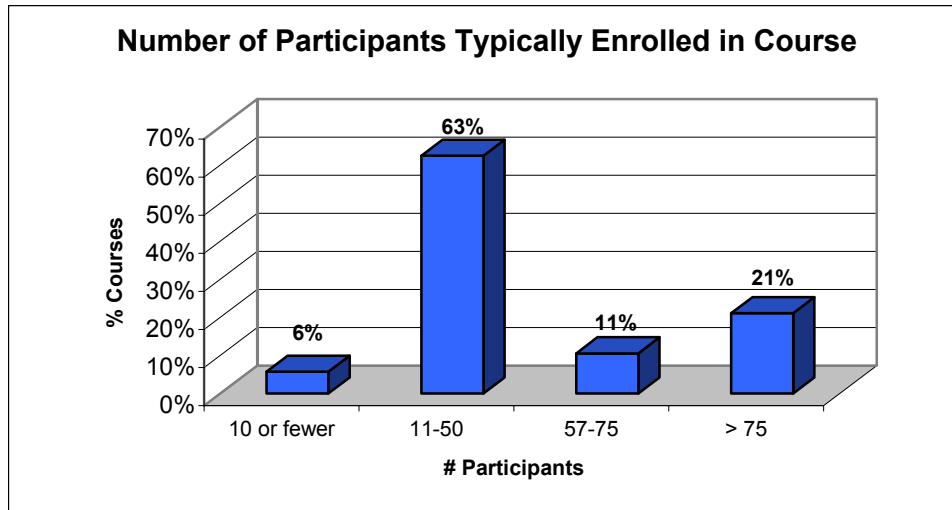


Course Participation

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). The survey results indicated that the typical number of participants who attend coastal resources management training courses offered by the training providers responding to the survey is 11 to 50 individuals.

Of the 104 courses conducted, the majority of individuals attending these courses typically number between 11 and 50 participants. Sixty-three percent of the courses were attended by audiences numbering 11 to 50 individuals, six percent of the courses were attended by audiences numbering 10 or fewer individuals, 11 percent were attended by audiences comprised of 57 to 75 individuals, and 21 percent were attended by audiences with more than 75 individuals. Figure 7 below depicts the number of participants typically enrolled in a course.

Figure 7

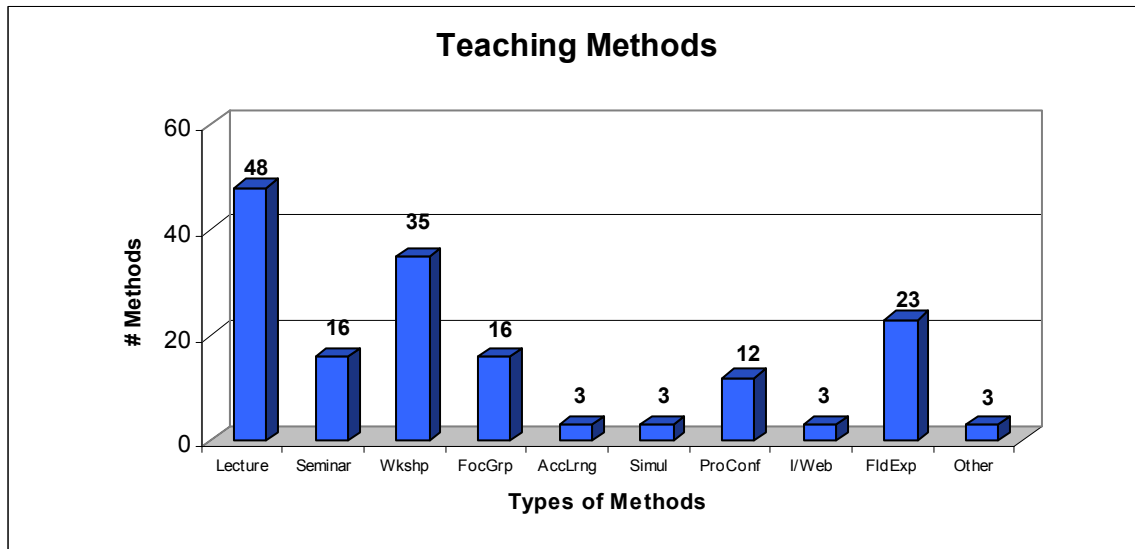


Course Instruction Methods

Training providers responding to the survey were asked to list the methods used by the instructors when conducting a course. The selection of methods included 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 majority of the training providers indicated that the instructors of the 104 courses used primarily a lecture method. A workshop format and field experience were also frequently used by instructors. Methods seldom 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. Figure 8 below displays the teaching methods utilized by instructors.

Figure 8

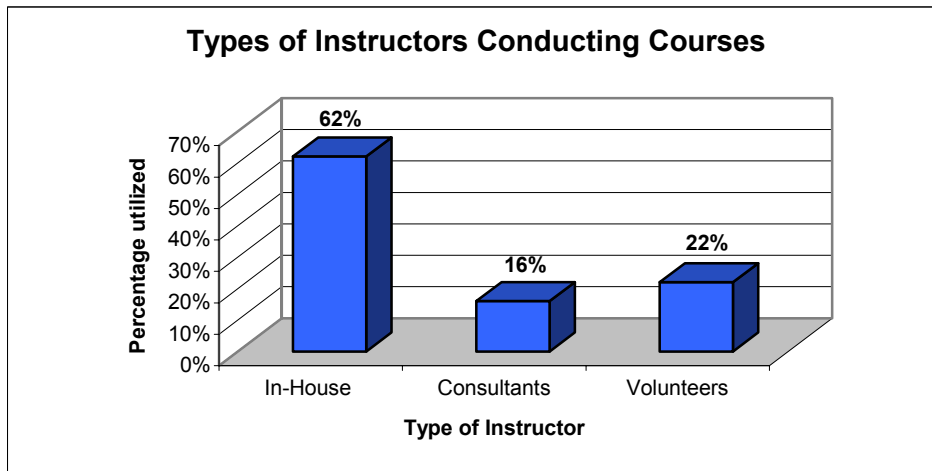


Types of Instructors

The survey respondents who provide training were asked to identify the types of instructors conducting the courses and the percentage that these instructors are utilized. The selections were in-house staff, hired consultants and volunteers. According to the survey results, the majority of the coastal resources management training courses were conducted by staff members and employees from within the agency or organization.

The average percentage of the 104 courses taught by in-house staff is 62 percent, while 22 percent of the courses (on average) were taught by volunteers and 16 percent by hired consultants. Figure 9 below displays the percentages of the types of instructors conducting courses.

Figure 9

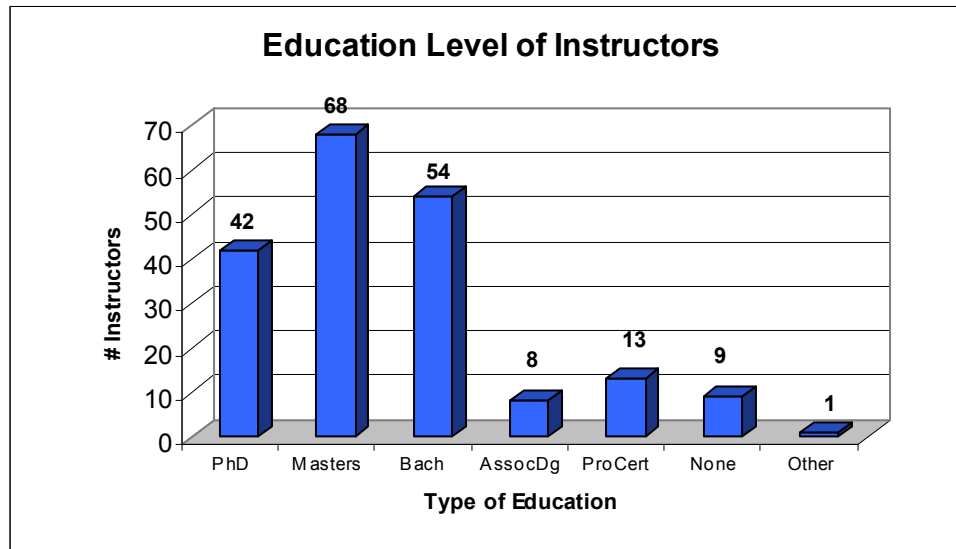


Education Level of Course Instructor(s)

The training providers responding to the survey 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 instructors teaching the 104 coastal resources management courses offered by the training providers responding to the survey primarily possessed college degrees at the masters and bachelors levels.

A large number of training providers also indicated that their instructors possess doctorate/professional degrees. A small number of instructors were professionally certified, while a few had associate degrees or no college degree. The training providers indicated they also utilized practitioners, directors, and CEOs to instruct courses. Figure 10 below depicts the education levels of instructors.

Figure 10

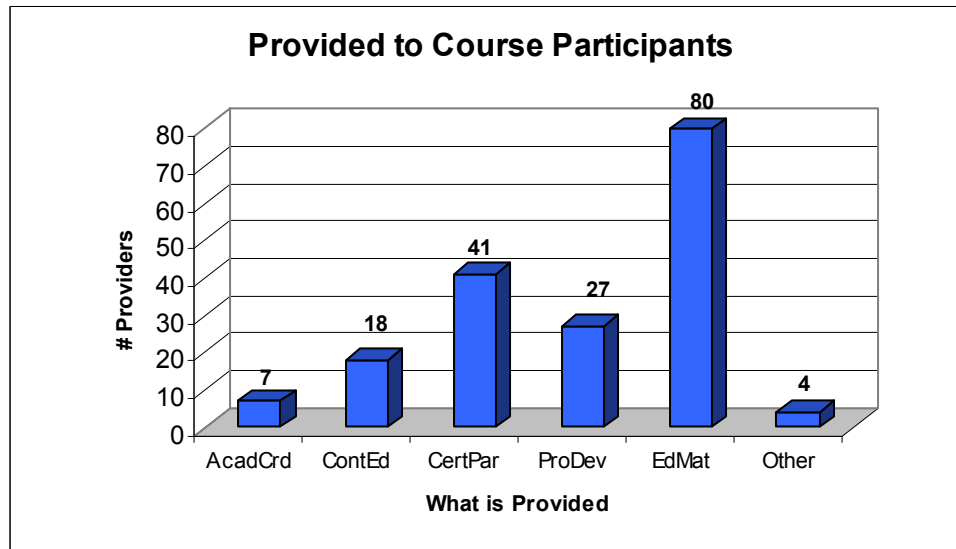


Course Completion

The survey respondents were asked to specify what is 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. Training providers who responded to the survey indicated that their participants primarily received educational/training materials upon successful completion of the 104 identified courses.

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. The results of the responses are depicted below in Figure 11.

Figure 11



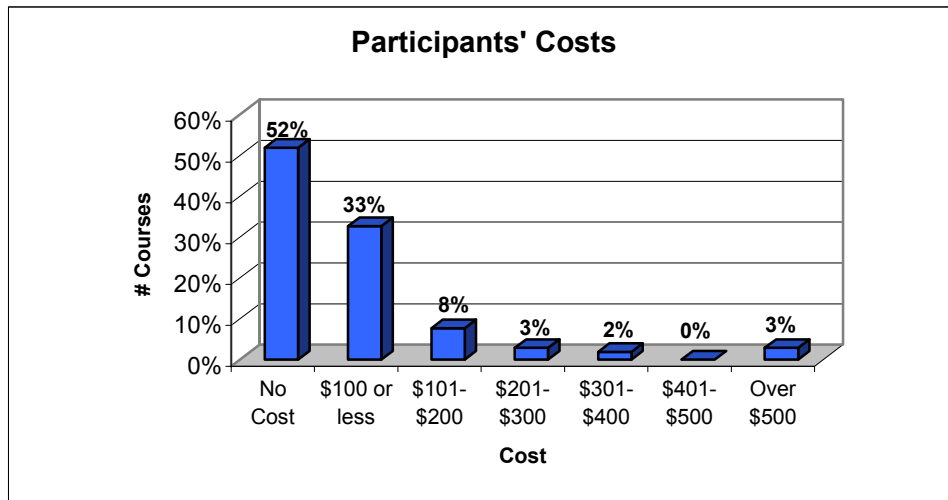
Course Cost(s) to Participants

Survey respondents providing training were asked to estimate the fees and/or costs incurred by participants who enrolled in the 104 identified courses. Choices of estimates were designated as no cost, \$100 or less, \$101-\$200, \$201-\$300, \$301-\$400, \$401-\$500, or over \$500. The survey results indicated that the majority of the training providers offered courses free to participants.

Of the 104 courses offered by the training providers, 52 percent of the courses are offered at no cost, while 33 percent of the courses are offered at a cost of \$100 or less. One provider indicated that the course is offered at no cost because the community pays an honorarium of \$100 per workshop.

Eight percent of the courses are offered for a fee of \$101-\$200, three percent are offered for a fee of \$201-\$300, two percent are offered at a cost of \$301-\$400, and three percent are offered at a cost of more than \$500 to participants. A breakdown of costs to participants is displayed in Figure 12 below.

Figure 12



Course Cost(s) to Training Providers

The survey respondents who provide training were asked to identify the largest item and cost associated with providing the 104 coastal resources management training courses offered last year by their organizations. The majority of the training providers listed salaries as the single highest cost item associated with providing training in coastal resources management. Ranking second were costs related to transportation and travel expenses incurred by the consultants, speakers, trainers, or attendees and tour buses for participants.

The third highest expense cited by training providers to conduct the 104 identified courses was meals and refreshments, the fourth highest expense was materials for participants, and the fifth highest was advertising and marketing costs to publicize the course. Ranking sixth were costs for rental, cleanup, and setup of facilities, and seventh was academic scholarships for participants subsidized by the provider. Table 6 below summarizes the results, and Appendix H details the survey results.

HIGHEST COST ITEMS INCURRED BY TRAINING PROVIDERS

Table 6

Description	Ranking
Salaries	1 st
Transportation/Travel	2 nd
Meals/Refreshments	3 rd
Materials	4 th
Advertising/Marketing	5 th
Facilities	6 th
Scholarships	7 th

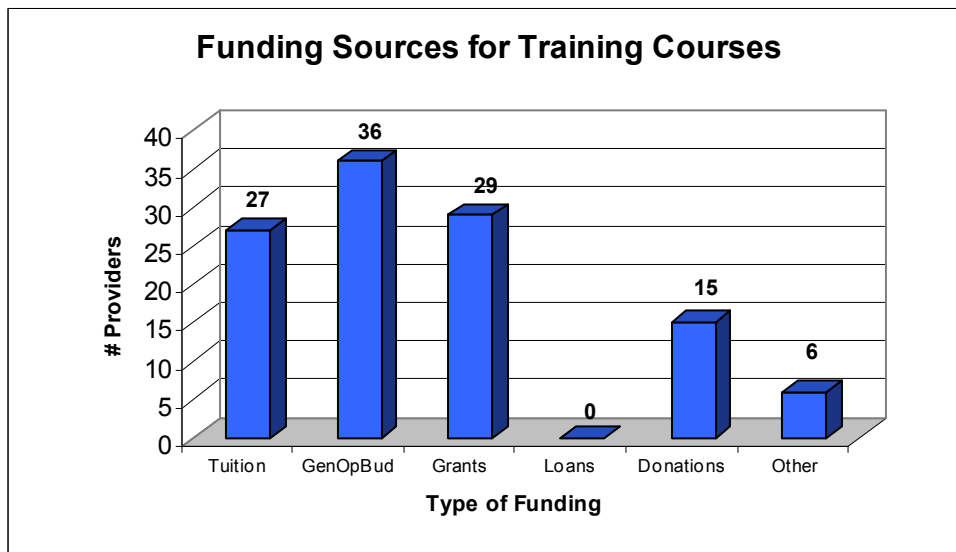
Section 4: Funding

Funding Sources to Conduct Training

The training providers responding to the survey were asked to specify how coastal resources management training opportunities are 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 responding to the survey indicated that their primary source of revenue for expenses incurred to provide training was derived from their general operating budgets. Training providers also utilized grants from public or private institutions and tuition or fees from participants to defer course costs. Charitable contributions and/or donations, and other sources such as community partners, county appropriations, gas tax revenues generated from boating use, and municipal contracts were infrequent revenue sources applied to defer training costs. The training providers indicated that loans were seldom used to aid in funding training courses. The funding sources are shown graphically in Figure 13 below.

Figure 13



Section 5: Target Audiences

Types of Audiences Targeted by Training Providers

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 included the 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 results of the survey indicated that elected officials and candidates (including county commissioners and legislators) were the audiences primarily targeted by training providers responding to the survey. A large number of respondents also marketed to local and state government employees. Audiences infrequently targeted by respondents were health department employees and port authorities/commissioners.

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 table below (Table 7) displays the rankings of the types of audiences targeted, while the matrix contained in Appendix I details the information.

TYPES OF AUDIENCES TARGETED (BY TRAINING PROVIDERS)

Table 7

Audience Targeted	Ranking
Elected officials/candidates	1
Local government employees	2
State government employees	3
Not-for-profit organizations	4
Consultants/consultant groups	5
Land use planners	5
Other	6
Federal government employees	7
Academic community	8
Science Community	9
Contractors	10
Corporations/Firms	10
Health department employees	11
Port authorities/commissioners	12

When segmented by sector – public, nonprofit, private, and public universities – the target audiences vary. Public entities providing training indicated that elected officials and candidates (including county commissioners and legislators) were the primary target audiences, while corporations/firms, health department employees and port authorities/commissioners were infrequently targeted. Other audiences cited by public entities as potential course participants were members of the local community, citizens, lawyers, grant-funded communities, solid waste districts, boaters, tourism officials, farmers, watershed landowners, real estate officials, landowners, developers, zoning officials, labor unions, general public, and citizen environmental groups.

The nonprofit organizations that provide training specified primary target audiences as elected officials and candidates (includes county commissioners and legislators). Other potential audiences targeted by nonprofit groups were neighborhoods/households, recreational divers, landowners, and citizens. Audiences infrequently targeted by nonprofit respondents were port authorities/commissioners.

The private sector companies responding to the survey indicated that their target audiences were consultants/consultant groups, corporations/firms, elected officials and candidates (includes county commissioners and legislators), land use planners, local and state government employees, and not-for-profit organizations. Audiences infrequently targeted by the survey respondents of private entities were the academic and science communities, health department employees, and port authorities/

commissioners. The private sector training providers additionally listed other audiences as potential participants for training courses – environmental educators and the media.

The target audiences specified by public university training providers responding to the survey were elected officials and candidates (includes county commissioners and legislators). The public universities providing training also cited the science community and not-for-profit organizations as potential audiences for coastal resources management training courses. Audiences infrequently targeted by the university training providers were contractors and port authorities/commissioners. Additional audiences listed by public university training providers as other audiences to target were regional and international commissions, resource users, students, the general public, and in-house staff. Table 8 below summarizes the survey results by sector.

ODNR COASTAL TRAINING MARKET ANALYSIS

TYPES OF AUDIENCES TARGETED (BY SECTOR)

Table 8

Sector	Audience	Ranking
<i>Public</i>	Elected officials/candidates	1
	Local government employees	2
	State government employees	3
	Consultants/consultant groups, Land use planners	4
	Federal government employees, Not-for-profit organizations	5
	Other	6
	Academic community	7
	Contractors	8
	Science community	9
	Corporations/firms, Health department employees	10
	Port authorities/commissioners	11
<i>Nonprofit</i>	Elected officials/candidates	1
	Local government employees	2
	Consultants/consultant groups, Land use planners, Other	3
	Academic community, Science community, State government employees	4
	Contractors, Not-for-profit organizations	5
	Corporations/firms, Federal government employees, Health department employees	6
	Port authorities/commissioners	7
<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
	Contractors, Federal government employees, Other	2
	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

Marketing Methods

The survey respondents 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.

The direct mail campaign was the marketing technique cited as most utilized by training providers responding to the survey to convey information on training opportunities offered by their organizations. Other popular methods used by training providers to market information to potential audiences were organizational newsletters, press releases, and email lists. Few training providers utilized telephone solicitations and television/public service announcements to convey training opportunities to potential audiences.

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

The table below (Table 9) summarizes the survey findings, while a detailed matrix is included in Appendix J.

MARKETING TECHNIQUES

Table 9

Technique	Ranking
Direct mail campaign	1
Organizational newsletters	2
Press releases	3
Email lists	4
Marketing done by cosponsors/partners	5
Organizational website	5
Other	6
Newspaper advertisements	7
Telephone solicitations	8
Television/public service announcements	9

The public, nonprofit, private, and public university sectors each utilize different techniques to market coastal resources management training courses to potential audiences. 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.

ODNR COASTAL TRAINING MARKET ANALYSIS

The university population that responded to the survey marketed to potential participants through direct mail campaigns, email lists, organizational newsletters, and websites. Newspaper advertisements, telephone solicitations, and television/public service announcements were infrequently used by the public universities responding to the survey to market training opportunities. The public university training providers additionally cited word-of-mouth, presentations at meetings, posters at colleges, and radio public service announcements as methods for encouraging course participation. Table 10 below summarizes the survey responses.

MARKETING TECHNIQUES BY SECTOR

Table 10

Sector	Technique	Ranking
<i>Public</i>	Direct mail campaigns	1
	Organizational newsletters	2
	Press releases	3
	Email lists	4
	Marketing done by co-sponsors/partners, Organizational website	5
	Newspaper advertisements	6
	Other	7
	Telephone solicitations	8
	Television/public service announcements	9
<i>Nonprofit</i>	Marketing done by co-sponsors/partners & Press releases	1
	Direct mail campaigns, Email lists, Organizational website	2
	Organizational newsletters, Other	3
	Telephone solicitations	4
	Newspaper advertisements	5
	Television/public service announcements	6
<i>Private</i>	Direct mail campaigns, Email lists, Marketing done by co-sponsors/partners	1
	Organizational newsletters, Organizational website, Press releases, Other	2
	Newspaper advertisements, Telephone solicitations, Television/public service announcements	3
<i>Universities</i>	Direct mail campaigns, Email lists, Organizational newsletters, Organizational website	1
	Press releases	2
	Marketing done by co-sponsors/partners, Other	3
	Newspaper advertisements, Telephone solicitations, Television/public service announcements	4

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
- Equipment/Logistical Factors
- External/Internal Marketing and Promotional Assistance
- Funding
- Instructional Quality/Nature of Training
- Personnel/Staff Assistance
- 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, equipment and logistical factors, funding, personnel and staff assistance, and regulatory/safety/security concerns. Appendix K of this report details the responses of the training providers.

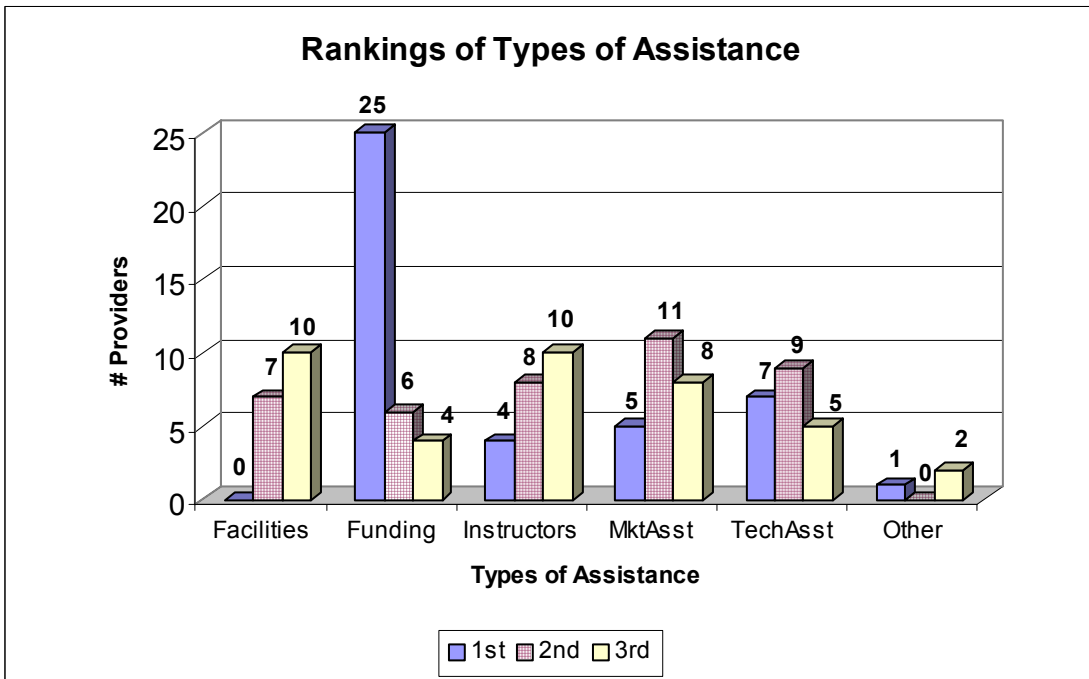
Assistance to Benefit Training Providers

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 are being reported because many respondents ranked only their top three choices. Also, responses for 46 of the 50 training providers are being reported. Since ODNR and its CTI partners would be offering the assistance, they were excluded from the results.

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. The figure below (Figure 14) graphically depicts the survey results.

Figure 14



APPENDICES

- Appendix A: Cover Letter, First Group; Cover Letter, Second and Third Groups
- Appendix B: Telephone Interview Questionnaire (First Group)
- Appendix C: Survey Questionnaire (Second and Third Groups)
- Appendix D: Database of Survey Candidates
- Appendix E: Mission Statements of Survey Respondents
- Appendix F: Topics Covered by Providers of Coastal Resources Management Training
- Appendix G: Name/Description/Location of Coastal Resources Management Courses
- Appendix H: Largest Item and Cost Incurred by Providers of Coastal Resources Management Training
- Appendix I: Types of Audiences Targeted by Providers of Coastal Resources Management Training
- Appendix J: Methods of Marketing Coastal Resources Management Training Opportunities
- Appendix K: Disparities in Coastal Resources Management Training Programs, as Identified by Training Providers

