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Hardscramble: a case study of eliciting conservation values through vernacular conservation methods

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HARDSCRAMBLE: A CASE STUDY OF ELICITING CONSERVATION
VALUES THROUGH VERNACULAR CONSERVATION METHODS

A Thesis
Presented to
the Graduate School of
Clemson University

In Partial Fulfillment
of the Requirements for the Degree
Master of Science
Parks, Recreation and Tourism Management

by
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Accepted by:
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ABSTRACT

Mrs. Margaret Lloyd was a philanthropist in South Carolina society who developed strong pro-environmental behaviors after a mid-life environmental epiphany. She passed away in 2014 and toward the end of her life she donated an 853-acre property - named Hardscramble - in Camden, South Carolina to Clemson University. The land and an associated endowment are valued at approximately \$10 million dollars. There are stipulations that the donation be managed in accordance to her wishes, but they are vaguely identified legally as conservation values. Since her death there have been conflicting opinions among stakeholders as to her vision and values that should drive the conservation plan for Hardscramble. To give voice to Mrs. Lloyd's wishes and have the conservation plan for Hardscramble be vernacular in nature, the purpose of this research case study is to uncover and elucidate Mrs. Lloyd's vision for the land and gift. This was accomplished through artifact analysis and interviews with people that knew Mrs. Lloyd and her vision for the land. Operationalizing Lloyd's vision has implications for the management of educational and recreational activities as well as the conservation practices on Hardscramble. Results of this research indicate that environmental education and preservation of the natural components of the conservation area are of critical importance. The socially co-constructed results delineate that activity on the land should be facilitated with the integrity of the natural ecosystem in mind. Results were organized using Mrs. Lloyd's own words for overlapping, agreed-upon guiding principles. Contextualized within the increasingly emerging trend of intergenerational land transfers as an aging national population makes decisions about the legacy of their properties, this research also contributes to the scholarship of utilizing vernacular methods to establish conservation values to inform the management of protected areas.

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CHAPTER ONE

INTRODUCTION

Literature Review

“Conservation is both a scientific enterprise and a social movement that seeks to protect nature, including the Earth’s animals, plants and ecosystems... Effective conservation requires a clear understanding of how people impact the planet and how they make decisions about their use of natural resources” (Kareiva & Marvier, 2003, p. 1). As a philosophy and practice, conservation deals with the human species’ relationship with the planet’s resources, ecosystem services, and non-exploitable geophysical processes. “In the development and management of protected areas, for example, the social sciences can complement the biological sciences in critical ways...Anthropological research can document the sociocultural and spiritual value of biodiversity. Together with other social science disciplines, anthropology can also identify the conservation-oriented cultural beliefs, values, norms, and rules that are often well suited to serve as the foundation for the formal laws and regulations that govern protected areas” (Mascia et al., 2003).

Social science methodologies are particularly useful as exploratory research for under-studied social phenomena. The values of philanthropists and the glut of impending land transfers are such topics. Keating and Munro point out that “the movement from one generation to the next has been cited as one of the most problematic phases in any business operation, especially those that are family owned and run” (p. 215, Keating and Munro, 1989). Currently the United States is experiencing an increasingly aging population of “Baby Boomers” that will lead to dramatic changes in the social landscape

across many sectors (National Research Council. 2001). The term “generational accounting” is used to describe “forward-looking public longitudinal data” regarding aging populations (Auerbach, 1991). With familial transfers as one of the primary resources for children (Mason, 2006), generational accounting involving bequests and land gifts to organizations are niche.

There are many ethical layers involved in intergenerational land transfers. These multiple ethical layers are important for the conservation professional looking to understand and speak to the beliefs, perceptions, and values of the philanthropist. The ethical questions of land transfers and bequests are already present within the mind of the land owner (Becker, 1991) but might not be fully understood or explored. Kholi (2004) acknowledges that “transfers are to a considerable extent motivated by altruistic concerns of parents with regard to their children, while the motivation of bequests remains more problematic.”

Land transfers to conservation organizations are one type of conservation support. Conservation investment is a similar trend that has been experiencing exponential growth, climbing 62 percent from 2004 to 2013 and from \$5.1 billion to \$8.2 billion, that includes investments such as sustainable food and fiber, (Gaworecki, 2017).

Two case studies of conservation philanthropists -Anton Rupert and Prince Bernhard in South Africa- can help shed light on the motivations of giving. Spierenburg and Wels (2010) use the unique process of wealthy philanthropists’ actions as a study in conservation giving and how it impacts a larger network. Both of these gentlemen were not only highly engaged with organizations like the World Wildlife Fund, but they also

used their wealth, privilege, access, social capital, and connections to develop two prominent social groups that funneled significant funding to African biodiversity conservation. “Together they developed the idea of the establishment of the “1001 Club”. The ‘one’ was Prince Bernhard. The other one thousand were wealthy individuals who could be persuaded to part with \$ 10.000” (p. 651). Afterwards, they created the “the “21-Club”, with membership fees set at \$1 million” (p. 662). Spierenburg and Wels continue their article with a discussion of how capitalism and philanthropy are intractably intertwined.

Pearce (2007) dives much deeper into the connection between capitalism and philanthropy and elucidates the gap that Kollmuss and Agyeman (2002) identify between values and pro-environmental behavior. Pearce (2007) is attempting to “measure the degree of care by measuring action taken, using two economic indicators: actual expenditures and stated, or implied, willingness to pay for biodiversity conservation. In so doing, we also try to resolve an apparent conundrum. A recent and widely discussed literature has suggested that the world’s willingness to pay for ecosystem conservation generally runs into many trillions of dollars, suggesting that the world does recognise the importance of ecosystem services and is willing to pay for them. But when we look at the actual expenditures on ecosystem conservation, they appear to be measured in, at best, a few billions of dollars annually. How can willingness to pay and actual payments differ by several orders of magnitude” (p. 314)?

However, to understand both the impact and critiques of conservation philanthropy better, Delfin and Tang (2006) provide a history of it in the United States.

Starting in the late 1800s, they build a simplified history: “the first wave of U.S. environmentalism during the Progressive era, a period characterized by active federal leadership of the conservation movement (Fox, 1981; Hays, 1959). Philanthropic giving for conservation reached an early peak in the 1930s and 1940s when Rockefeller money helped create or develop some of the nation’s major parks and scenic areas—Great Smoky National Park, Acadia National Park, Jackson Hole National Monument, California coast redwoods and Yosemite to name the most prominent (Fox, 1981; Gonzales, 2001; Wing, 1973). In the 1960s and 1970s, the federal government played a more active role in environmental regulation and conservation. However, federal leadership of this second wave of environmentalism began to erode in the 1980s with President Reagan’s emphasis on state’s rights and the growing attack by Wise Use advocates (Rosenbaum, 2002). These developments prompted renewed support for conservation among local land trusts and the larger private philanthropies such as Pew, Rockefeller Family, and the Packard Foundations during the 1990s when foundation assets were growing especially rapidly” (p. 406).

The economic benefits of conservation philanthropy are large, but the critiques are as well. Holmes (2012) discusses the sometimes-dubious ties between capitalism and conservation philanthropy. “Philanthropy is examined in terms of the two forces considered to be driving the neoliberalization of conservation — the need for capitalism to find new ways of making money, and the desire of conservationists to engage with capitalism as the best way of getting things done. It demonstrates how philanthropy can speak to both of these logics simultaneously, particularly through emerging ideas of

philanthrocapitalism, which may be enhancing the neoliberalization of both philanthropy and conservation” (p. 185). Holmes continues on, saying that: “Philanthrocapitalism is criticized as over-hyped, overly focused on technical fixes rather than structural causes of problems, and on quantitative, short term measures of success rather than a more complex notion of progress” (p. 196).

Chichilinisky and Heal (1998) state that “We have to ‘securitize’ (sell shares in the return from) ‘natural capital’ and environmental goods and services and enroll market forces in their conservation. This means assigning to corporations — possibly by public–private corporate partnerships — the obligation to manage and conserve natural capital in exchange for the right to the benefits from selling the services provided” (p. 629).

However, Sullivan (2012) shows that “conservation organizations have not significantly financialized existing revenue streams from in situ biodiversity conservation” (p. 199).

For an organization to tap into the philanthropy and conservation investment industries best, understanding the conservation values of the giver is a critical exercise. The term “conservation values” has different meanings depending on the context. This project is dependent on conservation easements and some of the legal requirements for establishing conservation easements use “conservation values” more tangibly than philosophers or other environmental thinkers. The IRS (2018) identifies conservation values for a conservation easement as “facts and circumstances,” geographical locations, and ecosystem services. An applicant must prove “whether a conservation easement provides a significant public benefit” through a Baseline Documentation Report (IRS, 2018). As we found in this project, the Land Trust holding the conservation easement

(Congaree Land Trust, 2006) identified seven conservation values to the property that are geographical locations and ecosystem services unique to the property as identified in the Baseline Documentation Report (Congaree Land Trust, 2013).

However, immaterial values are identified differently than the IRS usage. There are several ways to define values as they are pertinent to this project but a psychological definition is best. A value is a “stable meaning-producing superordinate cognitive structure. Considering its analogical nature, the value system may provide the basic architecture of what has been referred to as the “narrative mode” of human understanding” (Rohan, 2000) to inform belief systems that we inherit or develop (Manfredo et al., 2009). For our purposes, “conservation values” are better identified as “immaterial conservation values” under this usage and refer to attitudes, philosophies, beliefs, and principles that are applied to the natural world and the human/nature interaction.

There is an extensive literature of immaterial conservation values as distinguished between intrinsic and instrumental values, especially in philosophy texts, going back to Thoreau and beyond. Additionally, there is an extensive literature within the economic approaches to identifying conservation values through “willingness-to-pay” surveys. However, several papers show that “Explicit recognition of values would also promote greater transparency about what a conservation agency stands for in all aspects of its operation: from membership recruitment, fund-raising, through to public education, policy lobbying and on-the-ground project implementation” (p. 273, Jepson and Canney,

2003). Recognition of values and perceptions can assist evidence-based decision-making processes in conservation (Jepson and Canney, 2003).

Specifically, Satterfield (2001) advocates for new tools in eliciting nonmaterial conservation values of stakeholders: “Ultimately, value elicitation practitioners should be more ambitious about developing tools which fully accommodate the myriad expressions of value (from the economic to the deeply ethical) and employ user-friendly and emotionally and morally meaningful (though not necessarily controversial) contexts to help participants think carefully, reflectively, and imaginatively about value” (p. 356).

Cultural values relating to ecosystem services are challenging to integrate. Explicating cultural values from the basic needs associated with ecosystem services is difficult for researchers. Chan et al. (2012) state that “There is no easy way to deal with cultural values, pertaining to ecosystems or otherwise. This is sensitive territory, which is in part why it has been neglected in ES research for so long. But it is not uncharted territory, and it is not a total quagmire...” (p. 755).

Understanding values and perceptions can help mitigate intractable conflicts; in fact, it is one of primary methods recommended to both alleviate and avoid them. (Lewicki, 2003) Active listening is the first step in this process. Listening for what the participants are saying, how they are expressing themselves is an exercise in understanding the individual’s vernacular.

Vernacular conservation is an understudied area of research. It exists in an amorphous paradigm that includes cross-scale conservation, traditional ecological knowledge, community-based conservation, and participatory approaches to

conservation. Much more than a prescription or diagnostic tool, vernacular conservation is a method of engagement with a local community. “Vernacular conservation is a term to describe the use of the common or native (vernacular) meanings of place as a basis of conservation. Pimbert and Pretty (1995) define it as ‘conservation based on site-specific traditions and economies; it refers to ways of life and resource utilization that have evolved in place and, like vernacular architecture, is a direct expression of the relationship between communities and their habitats’” (p. 47, Baldwin & Judd, 2010). As Baldwin and Judd point out, vernacular conservation is similar to its more accepted cousin, vernacular architecture, which tries to make design decisions influenced by traditions in a particular culture. (Zhai, 2009) Vernacular conservation is a research process aimed at collecting local stories and voices from people with a direct connection to a piece of land (or water) and defining conservation goals through the lens of the local, hence vernacular (see Robertson, 2001 and Pimbert, 1995 for discussion). In reference to participatory approaches, Berkes (2004) says it “... is important for civil society because it helps empower indigenous peoples and community groups. It also provides place-based case studies for the interaction of researchers and stakeholders, who can define research questions and assess evidence through these case studies. Science and local knowledge can interact to improve the understanding of both parties of the need to conserve....” Further, Brosius and Russell (2003) call for “a social definition of conservation that validates and encourages small-scale local conservation efforts, that links conservation with issues such as soil fertility degradation and loss of traditional food crop varieties, and that entails a new kind of relationship between grassroots groups and international

organizations” (p.55). This strategy is an attempt to translate objective, large-scale conservation concerns with local, small-scale conservation values.

Western and Wright (1994) give the definition for community-based conservation as “includes natural resources or biodiversity protection by, for, and with the local community.” This definition could work for vernacular conservation if the focus is on the language and philosophy of values rather than the objects of concern, such as species or processes.

Berkes (2004) says: “An increasingly globalized world requires institutions that link the local level to the various higher levels of social and political organization. Such linkages can provide ways to deal with multiple objectives and multiple knowledge systems and may result in the creation of networks for learning and joint problem solving.” Berkes further shares an apt statement about community-based conservation that could easily apply to vernacular conservation: “In reconciling local and global objectives of conservation through community-based conservation, it is necessary to transcend simplistic formulations... There are legitimate community perspectives on what conservation is or could be, and it is an important task for conservation-development practitioners to understand these perspectives and deal with them....”

Another way to look at vernacular conservation and community-based conservation is as participatory development. Like participatory development, there is no one definition. The importance of community-based conservation comes in enhancing biodiversity conservation and to provide economic incentives for the local people (Campbell and Vainio-Mattila, 2003). Mehta and Heinan (2001) are more specific and

put conservation areas directly in the human context: “Protected areas are essentially a “social space” and as such they cannot be divorced from the human context” (p. 166). Hakkenberg (2008) furthers this sentiment: “...biodiversity may be defined as the dynamic, multifaceted and complex product of the interactions between natural and social systems, encompassing global ecology (hydrological cycles, food chains, vegetation succession, soil erosion control and climate regulation), economy (food, medicine, handicraft, fuel and timber) and culture (religious/symbolic and aesthetic/ recreational). When seen in this light, biodiversity is defined by the reciprocal relationship of the biological and cultural world” (p.75).

It is the argument here that to integrate the human and natural worlds, vernacular conservation is a method to give voice to the local community, to make conservation effective. An ideal exploration of this dynamic of using vernacular conservation to elicit conservation values, is the dangerous emerging trend of land disposal as an aging American population considers how to transfer their land holdings.

Intergenerational land transfers are an increasingly emerging national trend as an aging population makes decisions regarding their legacy. States are noting the increasing age of landowners and potential issues with the disposal of this land, especially forest, farm, and open space (Baldwin and Judd, 2010). As the “baby boomer” generation contemplates their legacy and the transfer of their property holdings, family inheritance of the estate often results in splitting contiguous lands as decedents divide and sell properties for quick turnaround and profit (Manjunatha et al., 2013). This trend is an impending conservation concern within the United States as large landholdings are

threatened with division, causing fragmentation of habitat. Fragmentation of large landscapes into smaller parcels has been shown to have drastic ecological impacts (Ram et al., 1999), the conversion of land-cover transformation into human development of residential and commercial purposes being the most dangerous to biodiversity loss.

This approaching land problem portends substantial threats to the conservation of biodiversity. Habitat destruction is one of the most significant of these five major threats (see Wilson, 2003 for discussion). The threat is so extensive that in the western part of the United States for example, “a football field worth of wildland is lost every hour to development” (The Disappearing West. Retrieved November 19, 2016). Innovative strategies are being utilized to curtail this behavior but one of the preferred tools to stop habitat destruction is to establish protected areas. Currently about 15% of the terrestrial earth and 3% of the oceans are set aside as protected areas, equating to approximately 160,000 terrestrial conservation areas and 65,000 marine areas, respectively (UNEP, 2016). Within the United States, over half of the land is privately owned, containing a high level of biodiversity, and a great majority of properties have at least some habitat for Federally listed species (Hilty and Merenlender, 2003). Some of the trends to increase protected areas include conservation investment, conservation easements, and land gifts.

This land disposal trend, on the other hand, offers a unique opportunity for conservation as some landowners are interested in donating land for conservation or philanthropic reasons to organizations they support. Gifts of land and associated funding to land-grant universities with missions of education and research help meet the shared goals of conservation. However, managing protected land and working within diverse

communities is a challenging endeavor and working strictly from top-down conservation objectives can alienate those communities and potentially stimulate intractable environmental conflicts (Lewicki, 2003). For the continued optimal stewardship of protected areas, establishing agreed-upon conservation values for future-use land management plans can help alleviate these conflicts. Eliciting conservation values requires engagement with local social actors, specifically key people and gatekeepers. These social actors, like people from all communities, have their own philosophies and experiences that identify their values and by using vernacular conservation methods, these unique perspectives can be honored appropriately and integrated into conservation objectives at multiple scales. Vernacular conservation is a research process aimed at collecting local stories and voices from people with a direct connection to a piece of land (or water) and defining conservation goals through the lens of the local, hence vernacular (see Robertson and Hull, 2001 and Pimbert, 1995 for discussion). This can allow conservation to be anchored in the local, and thus helping ensure relevance of conservation planning at larger scales. Vernacular conservation contributes to understanding the community-specific motivations for encouraging protected areas, private investment in conservation, and the promotion of biodiversity at local levels. The multi-scale approach of vernacular conservation to elicit conservation values can assist professionals in developing sustainable stewardship in socially co-constructed planning processes.

Background

Hardscrumble is an example of this land transfer scenario and figuring out what to do with the property is an example of using these methods. This research is a case study in eliciting conservation values through the pertinent vernacular to inform the stewardship of a conservation area that was gifted to Clemson University. The bounded system of study is the land Hardscrumble (Figure 1) the social co-constructed conservation values to Margaret Lloyd, the Camden community and Clemson University. This research was valuable to mitigating intractable conflicts through the vernacular process of actively engaging with stakeholders but can also serve as a foundation for all future activities on the land.



Figure 1. Hardscrumble is located in Camden, South Carolina

In 2006, an 875-acre undeveloped property in Camden, South Carolina, appraised at \$7.75 million, along with \$2 million for an endowment (that was subsequently matched by South Carolina's SmartState program to form an endowed chair position at Clemson), were donated by an environmentally-minded philanthropist to Clemson University. The official, written agreement of the donation contained a conservation easement, stipulations requiring planning of "education and research" activities within one year after the donation, and the option to sell one-hundred contiguous acres of the property for non-commercial and non-industrial "green" development, to directly benefit programs on the land. Creation of plans for land management and use were not met within the one-year clause and after a decade of virtual inactivity, and with the passing of the philanthropist in March 2014, pressure to address these legal requirements to develop appropriate land management strategies and sell the optional 100-acres necessitated action. However, with the economic downturn in 2007-2008, a refocus of the University and a lack of funds and to hire an endowed chair postponed critical work on the land. In this interim, the original intent and vision of the philanthropist were never adequately identified, and interpretation of the legal documents became unclear with time. Confusion and distrust of Clemson University was perceived to increase among the community surrounding the study site. The parcel of land is called Hardscramble and the philanthropist who gave the property is Mrs. Margaret H. Lloyd. The gift was to protect Hardscramble as a conservation area and Mrs. Lloyd wanted to enhance the human/nature connections in many ways. Throughout the following document,

“conservation area” and “philanthropist” are used interchangeably with “Hardscramble” and “Mrs. Lloyd,” respectively.

Organization of thesis

Developing the conservation values of Hardscramble was an exploratory, non-teleological process that resulted in the development of a place-based land ethic and guiding principles for future activity on the property. Sharing these results requires communicating the iterative process of the research as well as the story of Mrs. Lloyd and the gift to Clemson University. Additionally, the chronology of research demonstrates the nature of the discovery of the thematic categories that help create the land ethic and guiding principles. The organization of this document begins with the process of uncovering Mrs. Lloyd’s story and progresses through eliciting the conservation values through the artifacts, discussions with key people, and interviews with gatekeepers. Utilizing the co-constructed language of Mrs. Lloyd to explain this story is vernacular conservation. This document is framed in vernacular conservation and the intrinsic conclusions use these methods to interpret the values. In an effort to make the findings and the research process relevant to the larger scientific community, as well as the larger region surrounding the study site, the instrumental conclusions and suggestions for next steps are also described.

The process of eliciting the vernacular conservation values for the property, as well as the intrinsic conclusions, are shared in the following draft manuscript developed for submittal to the journal Conservation and Society, identified here as Chapter Two.

Chapter Three contains the instrumental (Stake, 1995) conclusions, suggestions for next steps, and the appendices.

Problem statement

Mrs. Lloyd gave Hardscramble to Clemson University in 2006 and passed away in 2014 without seeing meaningful activity on the land. While the conservation easement identifies geographical “Conservation Values” to form the legal basis of protection (Congaree Land Trust, 2006), immaterial conservation values – a vision and guiding principles – were never identified. In the vacuum of explicit values, stakeholders held their undefined, preconceived notions of what they believed to be the optimal use of the land in accordance to Mrs. Lloyd’s wishes. Due to several constraints, including the recession of 2007-2008, the land had not been a focus for Clemson University until 2016 and by this time the original intention of the gift became unclear. This problem can be identified as trying to understand the values for the conservation area Hardscramble in Camden, SC and how they should inform future land stewardship decisions for the land.

Purpose of the Research

The purpose of this research is to develop an understanding of the conservation values as Mrs. Lloyd saw them, operationalize them as a foundation for the land stewardship, and as a guide for future use on the property. To elicit these conservation values the following methods were used: artifact collection and analysis of the philanthropist and her gift, meetings with gatekeepers and key people, formal in-depth interviews, and verification strategies. Data collection happened over an eighteen-month period from fall of 2016 to the spring of 2018, and collection and analysis methods were

utilized to create thematic categories, the philanthropist's land ethic, and guiding principles; all using language and quotations of the philanthropist as discovered within the artifacts or supplied in the meetings and interviews. This approach is called "vernacular conservation" and it is defined as being "based on site specific traditions and economies; it refers to ways of life and resource utilization that have evolved in place, and like vernacular architecture, is a direct expression of the relationship between communities and their habitats" (Castilleja, 1993). Further, Baldwin and Judd (2011) describe it as "conservation design that includes the "native" perceptions of place in its design." In this case study, the language of the philanthropist is used to uncover the original values of the gift as agreed upon by the gatekeepers and key people to give voice to the intent of the donation and translate pertinent large-landscape conservation values into locally relevant conservation needs, and vice versa.

The immediate purpose of the research is to help inform land stewardship strategies of Hardscrabble. However, the donation and the land are important to understand and explore for several other reasons: ecologically, socially, legally, and as an instrumental case study. Ecologically, Hardscrabble is important as it contains Sandhills-influenced Longleaf Pine habitats, one of the last remnant habitats in the United States (Miller, Retrieved March 2, 2018). Additionally, Hardscrabble contains extensive deep-water river-front that has been largely undisturbed in over seventy years. Located near South Carolina's capital of Columbia, Camden is also home to influential and affluent acquaintances of Mrs. Lloyd and socially this project could potentially impact significant state and national perspectives of conservation. Legally, there are potential conflicts with

her children and others over the intended use of the land. Finally, Mrs. Lloyd was a unique individual who after a mid-life recovery from depression (Rosanoff, 2004) donated tens of millions of dollars to several environmental and civic causes, wrote and published a young-adult novel, developed a website, and spoke to children about the environment well into her eighties and nineties. Understanding her driving motivations and documenting the process of the Hardscramble project could contribute to developing the story of this unique conservationist. Additionally, this project can provide lessons-learned for similar conservation projects involving gifts of land to conservation-minded organizations.

Research questions

To inform the land stewardship of the property, the research questions for this study are: 1) what are the conservation values of the Hardscramble property, and 2) how can the conservation values of the Hardscramble property be operationalized into guiding principles?

Background of Mrs. Lloyd endowment

In January of 2016, Dr. Rob Baldwin of Clemson University was appointed Conservation Biology/GIS Chair, Margaret H. Lloyd-SmartState Endowment of the Forestry and Environmental Conservation Department. The Mrs. Lloyd Endowment came with the land Hardscramble. With a binder full of maps, deeds, and legal documents, Dr. Baldwin was pressed with trying to figure out what to do with the property. As a land grant university, Clemson has a long history of successfully managing land and working collaboratively within the respective communities. To do this

for Hardscramble, a strong interdisciplinary team was pieced together to understand the land, the legal documents, Mrs. Lloyd 's vision, and making the connection with the needs of the surrounding community and ecosystem. The team includes researchers in forestry, wildlife, environmental education, and conservation social science.

Hardscramble is 853 acres of property along the Wateree River in Camden, South Carolina that has a long history of ecological and cultural importance dating back to indigenous people from the area. The land was purchased in 1944 by Mrs. Lloyd for \$12,000 and donated to Clemson University in 2006 at an appraised \$7.75 million. It is close to areas developed for shopping and most notably a Wall-Mart supercenter. Therefore, although not an expansive piece of property, its proximity to town and river frontage made it a piece of interest from many people and organizations. Commercial, residential, and industrial development pressures have been steadily increasing around the property since her purchase in 1944.

Located within the larger COWASEE Basin, Hardscramble was a private land protected from development prior to the donation to Clemson University and put under conservation easement. Hardscramble is part of a larger connection of protected lands and "...as of 2010, 24,000 acres of the basin's private lands have been put in conservation easements by landowners and 47% of the 215,000 acres is in some form of official public or private protection" (p. 28, Cely, 2012). Hardscramble contains several sensitive habitats, wildlife species, a variety of soil types, and habitat for special status species (e.g. Red Cockaded Woodpeckers). Locally and regionally important, Hardscramble contains habitat and species that are being pressured from development elsewhere. As a

refuge for Longleaf Pine, Bald Eagles, and ecosystem services for the COWASEE Basin, Hardscramble is home to unique ecology worth sharing and deserving of restoration and scientific research. There are seven sensitive habitats on Hardscramble and they include: the “floodplain forest” bordering the Wateree River; Camp Creek; five headwater streams; the Pocosin Forests; a pond; the River Bluff; and the Longleaf Pine-Scrub Oak Forest that contains a mature longleaf forest approximately 150 years old (Congaree Land Trust, 2006).

Of the seven sensitive habitats, Longleaf Pine is regionally and globally significant and attractive to foresters and ecologists alike. The Longleaf Pine ecosystem is unique because it is not really a forest but rather a grassland with standing mature Longleaf Pine trees (see Noss, 1988 and Noss, 1989 for discussion). It requires an active fire schedule to remain healthy and is one of the most diverse ecosystems, partially because of this dramatic impact. The historic range of Longleaf spread from Virginia to Texas but has been reduced from 93 million acres to less than 2% of its historic range (Miller, 2016). On Hardscramble, the Longleaf Pine stand is vastly different from the rest of the property. Without the thick understory of the rest of the Loblolly and White Oak dominated areas, the Longleaf stand is open to the sky, breezy, and sits tall atop a thick layer of pine needles.

The origin of the name Hardscramble and the circumstances of Mrs. Lloyd’s original acquisition of the land -as well as property history prior to 1917- are unknown. However, Kershaw County and the town of Camden have a rich history that is well-

documented in A History of Kershaw County, South Carolina (2011). The Baseline Documentation Report (2013) identifies this specific history best:

“This area of Kershaw County is steeped in history, dating back to the very first European exploration of the North American interior when Hernando De Soto’s 600 Spanish conquistadors marched near this area in search of the legendary Indian village of Cofitachequi. John Lawson, English explorer and author [sic], provided the first written description of Cooks Mountain, at 371 feet the highest point in eastern Richland County, when he came through the Stateburg area in 1701. The old Kings Highway to the east of the Property traversed lands near the Santee and Wateree Rivers from Charleston to Camden. During the American Revolution, leading military figures on both sides, including Thomas Sumter, Francis “The Swamp Fox” Marion, Henry “Light-horse Harry” Lee, Nathanael Greene, and Lord Cornwallis left their marks in this area; The Property is also very close to the Revolutionary War battlefields located in and around Camden.”

Upon acceptance of Mrs. Lloyd’s gift, 753 acres of Hardscramble were put in a conservation easement for these historic and ecological purposes. A conservation easement is a legal agreement between a landowner and a land trust or government agency that permanently limits uses of the land in order to protect its conservation values. Congaree Land Trust is the organization that holds the Hardscramble conservation easement. The purposes of the Hardscramble conservation easement are: “to ensure that the land will be retained forever in its natural, restored, or enhanced condition; to ensure

that Hardscramble will be open and available for educational, environmental, and scientific purposes; to ensure the preservation and restoration of native species and their habitats; and to prevent any use that would interfere with the conservation values of the conservation property. Because of these reasons, there is no unsupervised right of access to the general public” (Congaree Land Trust, 2006).

Being a woman in the early 1900s, Margaret was told by her father she could not attend college. Growing up with a father that was a research luminary within entomology in the early 20th century and with many intellectuals in her life and family, (see Appendix A) she had always been interested in the natural world. In 1941, she married Dick Lloyd, they had four children and when her youngest son was seven she suffered depression. At the lowest depth of this depression, Mrs. Lloyd woke up one morning to a voice in her head that told her that she could rely on no one but herself to create her life (Rosanoff, 2004). This one simple statement had pulled open the curtains in the darkness she had been inhabiting and she woke startled, telling herself: “I could do anything I damn pleased” (Rosanoff, 2004). What had been a sluggish mire that she was trudging through, the long days quickly became hours of opportunity to recreate herself. Fortunately, Mrs. Lloyd had grown up affluent and had married a successful businessman. Their combined resources allowed her epiphanies to come to fruition slowly and organically. However, this same good fortune ill-prepared her for handling the challenges of life (Rosanoff, 2004).

In her early fifties, with four children, and a recently deceased husband, Mrs. Lloyd was alone and overwhelmed. With the new outlook on life but no guidance on how

to proceed, that same disembodied voice in her head stopped her in her tracks as she entered an alleyway. It said: ““if you really believe what you think you believe, you’re going to have to let go” ...Let go? How can I let go? I have four children and I’m all alone and I’m hanging on by my fingernails” (Rosanoff, 2004). Serendipitously, she looked in the sky and saw an “obelisk” floating in the alley. This misperception of a simple building forced her to think:

“I can only see one side of that [building] but the universe can see inside and outside and all four sides- or god, or whatever it is- and I thought I can only see one side of anything. And what makes me think I can be in control of anything I can only see one side of? I’m really not in control, I just think I am. But the universe is. And if I let go and trust whatever comes then I will be presented with things that I have to deal with and I have to deal with them anyhow” (Rosanoff, 2004).

These seemingly contradictory revelations - that only she can save herself and that she needs to stop trying to control everything – changed Mrs. Lloyd’s entire life. For her remaining years she tried to empower others and live, as she called it, “within her knowing.”

Empowered as never before, Mrs. Lloyd moved into a new home only blocks away from Gallatin School of New York University and enrolled in classes. She pursued her lifelong interest in the sciences and eventually graduated with a bachelor’s degree in geology. With this success under her belt and a new knowledge of the natural world, Mrs. Lloyd began her personal quest into understanding what we would now call the

interconnections of the global ecosystem. While it seems through her writings that she was influenced by the environmental philosophy of Deep Ecology and Aldo Leopold's land ethic, the only text she read that could be confirmed was Web of Life (1953) by John Storer who was also her uncle. Coupled with her intuition, or her "knowing," Ms. Lloyd used these philosophies to recreate herself and the gifts she would leave upon the world.

The Lloyds had great affinity for the home and community they had built in Kershaw County, South Carolina. Mrs. Lloyd was born in Philadelphia, had a home in New York, and with her husband bought a home and raised their family in South Carolina. Because of these deep roots the Lloyds gave generously to the area and helped build the Fine Arts Center of Kershaw County and a preserve now called the Lloyd Woods. Being familiar with the power of philanthropy through these and other gifts, Ms. Lloyd found that giving funds to the Deep Ecologist thinkers of the Whidbey Island Institute in the state of Washington would be an ideal way to support environmental philosophies. The Institute was able to construct a handsome building used for large gatherings with her gift.

Study site

Camden, the town where the Lloyd's raised their family, is a small town of approximately seven thousand people located southeast of Columbia, the capitol of South Carolina. Originally Camden was home to the Wateree native people and was initially called Fredericksburg by the British (Inabinet and Inabinet, 2011). Fredericksburg was one of the only in-land townships established by King George II in the early 1700s and after the American Revolutionary War was renamed Camden. The people of Camden are

proud of their long American history. As a bedroom community of the state's capitol, Camden has a history of politically relevant people; philanthropic engagement from passionate funders; and an interest in horses, timber, and development. As wealthy land owners, the Lloyds raised their family in this community and were present in civic activities as well as local forestry. The Lloyds contributed to the Fine Arts Center and Dick Lloyd started the South Carolina Forestry Association in addition to creating the state's first conservation easement. Several interviewees mentioned that the Lloyds were "well regarded" in Camden.

Approach

This research was designed to solve the problem of understanding the wishes of a deceased individual, Mrs. Lloyd. Luckily, she wrote and discussed her thoughts about life and her vision for Hardscrabble, the land that she gave to Clemson University, with many people. She was well known, and so finding participants for this research was not a challenge. But linking the legal documents of the gift and the previous work on development and restoration planning with her vision was a challenge because each of these perspectives was held by different stakeholders. To dive deep into Mrs. Lloyd's life, this research relied heavily on documents and interviews. Additionally, this pragmatic research case study employed verification strategies, including a modified Delphi approach. This approach summarizes interview data and shares it anonymously so that the participants can engage with the merit of the ideas and not respond to who said statements. It is a technique used by the Department of Defense for decision making and is helpful anytime there are multiple interest from expert and engaged stakeholders.

With the conservation values undefined after of a decade of inactivity, no one had attempted to collect data on Mrs. Lloyd 's philosophies or for land management purposes, beyond the initial Baseline Documentation Report. Therefore, this research was separated into four phases to attempt to develop a comprehensive narrative to inform and contextualize the socially co-constructed conservation values. Each phase has data collection, data analysis, and data management to develop interim results that help create the final results of the larger project. The final results from this research come from in-depth interviews with people that knew Mrs. Lloyd well, and her attachment and vision for Hardscrabble (n=5).

The results are presented for each research phase so that the linkage used in analysis can be demonstrated. Due to the exploratory character of this research, results and discussion are intertwined. This inductive research was an iterative and dialectic process that built upon evidence, verifying claims as they were encountered. In fact, considering the ambiguous nature of the problems facing the larger research project, the initial research questions were consciously developed as surrogate questions to guide the data collection (see Appendix C for development of research questions). As more information was uncovered, the trajectory of the research was refined.

Data collection occurred through artifact gathering, information collected from formal and informal meetings, and formal interviews that were anonymous and confidential, stored on researcher's protected hard drives. Data that was not anonymous and confidential has been shared with the research team and distributed on a project

website. To ensure this inductive data collection was subject to the least detrimental bias, several verification strategies were employed throughout the process.

Data Collection

Data collection occurred through three main sources: artifact collection and analysis, formal meetings with gatekeepers, formal interviews, and verification strategies. Because of the exploratory character of this research, collection and analysis are concomitant and the chronology of these results is presented below.

Phase 1 – Artifacts

Data Collection Method: Artifact Discovery

Summary: With the large amount of money and the precedent-setting size of the property and donation to Clemson University, many documents were produced regarding the transfer and Mrs. Lloyd herself. Additionally, all material came from a young-adult novel she wrote, an environmental education website she developed, and a television interview about her work. Considering the researchers are outsiders to the social norms surrounding the project, purposeful methods were used to collect and analyze all the artifacts possible to develop a more robust idea of the land, the donation, and Mrs. Lloyd.

Timeframe: August 2016- February 2018

Data analysis: Notes were taken from each artifact and shared with the research team and compared with other artifact data. Some data was shared with gatekeepers as a way of stimulating conversation grounded in both legal documents as well as Mrs. Lloyd's words on video or writing. Some of these findings were used as sources for interview questions and some were presented by the family and others who knew Mrs. Lloyd and

were made aware of this research project. All artifacts were treated as important and examined for information to aid in a more in-depth understanding of Mrs. Lloyd, her vision for Hardscramble, and to offer clues to unanswered questions about Clemson's stewardship of the land.

Deliverables: The artifacts uncovered include: obituaries of both Mrs. and Mr. Lloyd; articles about Mrs. Lloyd; evidence of other donations; her novel Hortishland (2001); a public television interview; her website, Makeconnections.org; the conservation easement and associated legal documents; various depictions and maps of the property; an early presentation developed for the Camden community by landscape architects; and property records. These artifacts as well as a summary and description are listed within Appendix A. The primary benefit of these artifacts is that they provide a unique profile of Mrs. Lloyd independent of any one person's interpretation. Along these lines, the artifacts provide context and verifiable evidence to dates, locations, and items discussed in meetings and interviews.

Phase 2—Gatekeepers

Data Collection Method: Formal meetings

Summary: Two formal meetings occurred with the intent to get all pertinent stakeholders, researchers, and interested parties in the same room to meet each other. This was mostly accomplished with the first five-hour meeting and then fully complete after the second meeting two months later.

Timeframe: December 2016 and February 2017

Data analysis: Notes were collected by two sources at the first meeting and three at the second meeting. These notes were transcribed and used for forming interview questions and for identification of research participants. The analysis of the meetings and notes from these meetings also helped identify potential for conflict and frustration in effective conservation planning.

Deliverables: Several deliverables came out of these meetings. First and foremost, the process of the meeting itself was the most important deliverable. Giving everyone an opportunity to meet each other and discuss the project helped to establish trustworthiness. Additionally, there were critical facts and contextual information that were shared that could not be gathered in any other way. These are fully documented in the Appendix A but the most relevant are: confirmation that the property is called Hardscramble; one of the most important gatekeepers exhibited preliminary support of the project; and we learned that Mrs. Lloyd was originally going to donate the land to the Kershaw County School District. Further, the trajectory of research and planning for the land shifted slightly to include different stakeholders as well as unforeseen artifacts, including new maps and archeological data.

Phase 3 – In-depth interviews

Data collection: Formal, anonymous, confidential interviews were collected from participants with an in-depth knowledge of Mrs. Lloyd and her vision for her land Hardscramble, especially related to her gift of the land to Clemson University. Participants were identified through purposive methods and were recruited through email. The criteria for including interviewees was personal knowledge of Mrs. Lloyd or her

family, knowledge of the donation to Clemson University, and experience on the Hardscramble property. All requests for interviews were granted. The interviewees were: Austin Jenkins, Ph.D.; Paul “Mac” Horton, Ph.D.; John Kelly, Ph.D.; Robert Sheheen, Esq.; and Coy Meyers. Subsequent interviews of Margaret “Miggie” Keuler and her sister Sue Scannell, daughters of Margaret Lloyd, were conducted via email later and are considered within the verification strategies.

Timeframe: September 2017

Summary: Between September 1, 2017 and October 1 2017, five formal interviews occurred with identified stakeholders and gatekeepers. Each interview averaged approximately 1.5 hours, was completely anonymous and confidential, was recorded for audio, and transcribed. Originally, 13 people were identified to interview but the five we interviewed were the individuals that met our criteria and agreed to the interview.

Data analysis: A total of 8.5 hours of interviews were audio recorded and transcribed. Confidentiality and anonymity were kept for each interview and all identifying information was either excluded from the beginning or redacted upon subsequent review. Transcribed interviews were analyzed using MaxQDA software. MaxQDA is qualitative research software that facilitates the review and coding of multiple written documents. The organization of coded segments through all documents can be easily accessed and transferred to spreadsheets for development of thematic categories of the whole project. Inductive coding of transcribed interviews occurred. Within these transcribed interviews 503 coded segments were identified. Some of the coded segments agreed with each other and others disagreed but all like-data was collected in categories. The coded segments

were put through the process of thematic categorization after several rounds of analysis and three thematic categories were eventually developed.

Deliverable: Three thematic statements have been developed that combine data collected from interviews, artifact analysis, and stakeholder meetings. These thematic statements include: Portrait of a Conservation Philanthropist, a Vision for Activities on the Conservation Area, Recreation Generally. The thematic categories are simply categories for similar thoughts. Developing the thematic categories was a balance between combining like data and ensuring that not everything fit in any one category. It was a process of editing that is inherently biased. This bias is perceived as a strength and is identified as “researcher discernment.” Throughout the interview process, it was made clear several times that interviewees had spoken with each other and others within the community. Incidentally, two interviews began with the interviewee telling the researchers that they had spoken to other interviewees about their interview. While extreme caution was used by the researchers to not share information from any specific interviewee, they were often aware that a discussion occurred.

Phase 4 – Verification Strategies

Data collection: Verification strategies

Summary: Within qualitative research, inherent researcher bias is not detrimental to results; rather, it is seen as the discernment of a trained observer. The researcher is the tool in this process. In this exploratory approach, discernment is not a fatal flaw while searching through the phenomenon but, rather, necessary to guide discussion. However, discernment does necessitate the rigor of accuracy and to strive for accuracy with the best

possible means available. To achieve this, multiple verification strategies were utilized intermittently throughout the research process. These methods included: regular reflexivity exercises; member-checking; the discipline of maintaining an audit trail; inter-rater reliability; modified Delphi Method; being careful not to offer leading questions; and searching for third-party evidence to confirm statements made by interviewees.

Timeframe: Intermittently between September 2016 – February 2018

Data analysis: Triangulation of data to establish accuracy and focus researcher's discernment. The process of consistent checking of researcher's preconceived notions so that the language shared was accurately Mrs. Lloyd's and not subtly the researcher's perspective. Additionally, several statements and preconceived beliefs among interest groups, stakeholders, and gatekeepers were either verified or discounted through this process.

Deliverable: Confirmability of facts and accuracy of perspectives

Role of researcher

This research “requires the researcher to be critically conscious through personal accounting of how the researcher's self-location (across for example, gender, race, class, sexuality, ethnicity, nationality), position, and interests influence all stages of the research process. The results of all of this reflexivity is to produce research that questions its own interpretations and is reflexive about its own knowledge production towards the goal of producing better, less distorted research accounts (p. 178, Pillow, 2003).”

“Three practical measures for maintaining the necessary balance between researcher’s own experience and that of the participants include the use of a log, repeated review, and seeking peer consultation (p. 230, Berger, 2015).”

“It is important to remember that the researcher’s position may be fluid rather than static, and it inevitably affects the emic-etic balance in the research project. Therefore, researchers must continually ask themselves where they are at any given moment in relation to what they study and what are the potential ramifications of this position on their research (p.231, Berger, 2015).”

The primary researcher in this project is a graduate student at Clemson University -but otherwise an outsider to the project- coming from California and with a professional background in habitat restoration, non-profit consultation, and land management. Interviewees were happy to share as much of their history as possible to inform the researcher as an outsider.

This project required the researcher to be the research instrument while collecting multiple sources of data (Berger, 2015) and care was taken to mitigate researcher bias that could make results unreliable. As a research instrument, calibration was necessary. In an effort for the researchers to calibrate themselves, several reflexivity exercises were undertaken throughout the project to ensure that personal beliefs or preferences did not interfere or substitute for the language of the donor or the community, these efforts are the verification strategies. One of the most effective verification strategies is called a reflexivity exercise (Pillow, 2003). In the autumn of 2016 and the spring and autumn of 2017, the primary researcher conducted reflexivity exercises to ensure that the data being

collected was accurate to the project rather than the researcher's perceived or desired reality. It would be unacceptable to have the researcher's preconceived notions about conservation, ontology, and epistemology expressed under the guise of Mrs. Lloyd's land ethic and the conservation values of the Hardscramble project. Therefore, at each reflexivity exercise, the primary researcher asked himself a series of questions about his beliefs, values, philosophies to check where his personal beliefs were in regard to the data being collected about Mrs. Lloyd's philosophy of life. The specific concern was whether the researcher's beliefs were being shared through the voice of Mrs. Lloyd.

CHAPTER TWO

HARDSCRAMBLE: A CASE STUDY IN ELICITING VERNACULAR CONSERVATION VALUES FOR CONSERVATION PLANNING

We are entering a period of the largest land transfer in modern American history as the Baby Boomers die and pass land to family and other entities (National Research Council. 2001). Many of these landscapes will be subdivided and sold off as the heirs aim to turn the property and sell to developers for quick profit. The division of land and subsequent development will increase fragmentation of habitat (Manjunatha et al., 2013), drastically impacting biodiversity conservation (Ram et al., 1999). The threat of these intergenerational land transfers to biodiversity loss is significant; in the western part of the United States for example, “a football field worth of wildland is lost every hour to development” (The Disappearing West. Retrieved November 19, 2016). Traditionally, the tools available to conservation professionals for land protection have included creation of protected areas, establishment of conservation easements, or gifts to conservation-minded organizations. Land transfers often result in development but some of this land will be gifted and gifts of land and associated funding to land-grant universities with missions of education and research help meet the shared goals of conservation.

However, managing protected land and working within diverse communities is a challenging endeavor and working strictly from top-down conservation objectives can alienate those communities and potentially stimulate intractable environmental conflicts (Lewicki, 2003). For the continued optimal stewardship of protected areas, establishing

agreed-upon conservation values for future-use land management plans can alleviate these conflicts. Eliciting conservation values requires engagement with local social actors, specifically: key people and gatekeepers. These social actors, like people from all communities, have their own philosophies and experiences that identify their values and by using vernacular conservation methods, these unique perspectives can be honored appropriately and integrated into conservation objectives at multiple scales. Vernacular conservation contributes to understanding the community-specific motivations for encouraging protected areas, private investment in conservation, and the promotion of biodiversity at local levels. The multi-scale approach of vernacular conservation to elicit conservation values can assist professionals in developing sustainable stewardship in socially co-constructed planning processes.

How the land transfer trend of these lands will affect conservation locally and generally will unfold within the next generation. Preparing conservation professionals to engage with this trend effectively will require an understanding of the philanthropist's values and beliefs. The following is a case study of such a parcel and situation involving conservation values.

The philanthropist's family

The Lloyd family consists of Mrs. Margaret Lloyd and Dick Lloyd and their four children. While the Lloyds were wealthy landowners with properties around the country, they raised their family in Camden, South Carolina. The Lloyd children call their parents the G1- as in "Generation 1," themselves as the G2, while the grandchildren are G3. At one point the G1 owned approximately 25,000 acres of property around Camden which

has since been put in trust, inherited by the G2 and G3, or sold. The G2 live all over the country and have occasionally returned to Camden as a family to visit and check on properties. All interviewees agree that “as a family they have exhibited environmentally-minded behavior such as “carbon credit stuff” and aversion to “chemical site work.” The family continues to be mindful of the environmental impact of their land. Mrs. Lloyd had a strong environmental ethic that matured throughout her life and her husband, Dick, was an innovative forester who created South Carolina’s first conservation easement and also co-founded the South Carolina Forestry Association.

Study Site

In the early 2000s, Mrs. Lloyd was looking to protect one of her favorite properties, Hardscramble, into perpetuity and provide environmental education with the unique characteristics of Hardscramble. Initially she wanted to give the land to the local school district but was advised against that strategy, which led to the creation of an environmental education-focused company, Hard Scramble Inc, as a back-up plan. Shortly thereafter, Mrs. Lloyd was introduced to Dr. John Kelly, vice president for economic development for Clemson University and several years of discussion began the process of donating the property to the university for preservation, education, and research. In 2006, the 853 acres, appraised at \$7.75 million, was donated to the school with an additional \$2 million to provide for a Smart-State endowed professorship. The land was also put under a conservation easement held by the Congaree Land Trust. While the 853 acres were set aside for preservation, 100 acres were allowed to be removed and sold for the purposes of raising funds for Clemson’s mission. These 100 acres have

development restrictions to “green” residential purposes that need to be contiguous, meaning the location within the larger 853 acres can be mutually agreed upon but must stay together as one property. One of the stipulations of the donation was that activity must occur within one year of transfer in 2006 and there was no measurable activity until 2016, due mostly to the recession of 2008. At the time, the donation of Hardscramble and additional \$2 million was the largest land donation to Clemson University. The size of the donation, the additional \$2 million, and the decade of inactivity by Clemson University led some influential people in Camden to mistrust the school’s intentions and process.

In addition to the \$2 million donation from the philanthropist, Clemson made a strategic decision to pursue South Carolina SmartState matching funds. SmartState was a program started in 2002 by the South Carolina General Assembly and the “legislation authorizes the state's three public research institutions—Clemson University, the Medical University of South Carolina and the University of South Carolina—to use state lottery funds to create Centers of Economic Excellence in research areas that will advance South Carolina's economy” (SmartState, retrieved March 12, 2018). With this decision, Clemson used the entire \$4 million dollars to create an endowed chair in "Urban Ecology and Restoration.” Creating this endowed chair expands the focus of the original gift into a faculty's research program in Urban Ecology and Restoration, and Economic Excellence, with expectation of generating grant dollars, publishing papers, and graduating students (Dr. Rob Baldwin, personal communication, March 11, 2018).

Hardscramble is riverfront property in Camden, South Carolina that has a long history of ecological and cultural importance dating back to indigenous people. Hardscramble contains approximately a half-dozen sensitive habitats and unique characteristics. The land was purchased in 1944 by Mrs. Lloyd for \$12,000 and donated to Clemson University in 2006 at an appraised \$7.75 million. Commercial, residential, and industrial development pressures have been steadily increasing around the property since her purchase in 1944. The origination of the name Hardscramble and the circumstances of Mrs. Lloyd's original acquisition of the land -as well as property history prior to 1917- are unknown and further explained in Appendix A.

Community where the conservation area is located

Camden is a small town of approximately seven thousand people located southeast of Columbia, the capitol of South Carolina. Originally Camden was home to the Wateree native people and was initially called Fredericksburg by the British. Fredericksburg was one of the only in-land townships established by King George II in the early 1700s and after the American Revolutionary War was renamed Camden. The people of Camden are proud of their long American history. As a bedroom community of the state's capitol, Camden has a history of politically relevant people; philanthropic engagement from passionate funders; and an interest in horses, timber, and development. As wealthy land owners, the Lloyds raised their family in this community and were active in civic activities as well as local forestry. The Lloyds contributed to the Fine Arts Center and Dick Lloyd started the South Carolina Forestry Association in addition to creating the state's first conservation easement. Several interviewees mentioned that the

Lloyds were “well regarded” in Camden and two interviewees stated that Camden “high society... was not at all convinced that that gift [of Hardscrabble to Clemson University] was in Mrs. Lloyd’s best interest.”

The following quote by Worster (1995) is a poignant consilience of the sciences and the humanities: “Environmental conservation becomes, by this way of historical thinking, an effort to protect certain rates of change going on within the biological world from incompatible changes going on within our economy and technology.... Today, historians can no longer claim there is a single universal narrative of change that all species, all communities, all places, must conform to. “History” has given way “histories.” Each of these histories needs space to play itself out, to unwind its narrative. This is precisely what the modern idea of conservation aims to do: provide the space, either set aside in large, discrete blocks or protected within the interstices of the landscape, so that all the many histories can coexist – the history of a tropical rainforest alongside the history of a political struggle. This strategy of trying to conserve a diversity of changes may seem paradoxical, but it is founded on a crucial and reasonable insight. We may live by change, and we may be the products of change, but we do not always know – indeed, we cannot always know – which changes are vital and which are deadly” (p. 82).

Vernacular conservation is the process of giving voice to a local community in regard to their environmental ethic, their philosophy, and their relationship to the natural world. Baldwin and Judd (2010) define vernacular conservation as: “a term to describe the use of the common or native (vernacular) meanings of place as a basis of

conservation. Pimbert and Pretty (1995) define it as ‘conservation based on site-specific traditions and economies; it refers to ways of life and resource utilization that have evolved in place and, like vernacular architecture, is a direct expression of the relationship between communities and their habitats’” (p. 47). Additionally, Lewicki (2003) has shown that intractable environmental conflicts among various stakeholders are often avoidable. The intractable conflicts and motivations for investment exist in the world of conservation values. Therefore, we argue that it is possible and beneficial to land managers and conservation professionals to elicit conservation values for purposes of assuaging intractable conflicts, understanding the motivations for investment, and to help inform comprehensive yet adaptive land management activities on contested conservation areas or an effort to make them more likely to be successful (Salafsky, 2001).

This research contributes to the process of eliciting conservation values for these purposes through the case study (Stake, 1995) of a donation of unique, undeveloped property to Clemson University by a woman with financial means and an interest in the human-nature connection. Through artifact collection, gatekeeper outreach, and inductive interviews, this project socially co-created a land ethic and land stewardship principles for a conservation area by utilizing vernacular conservation methods of facilitating local communities to give voice to their interpretation of the project’s goals. This project empowers community engagement and helps stimulate support from pertinent gatekeepers not only in the results of the research but also in the systematic process.

The purpose of this research is to develop an understanding of the conservation values as Mrs. Lloyd saw them, operationalize them as a foundation for the land stewardship, and guide future use on the property. To develop this understanding, it is important to know the values for the conservation area Hardscramble and how should they inform future land stewardship decisions. To this end, the research questions for this study are: 1) what are the conservation values for the Hardscramble property, and 2) how can the conservation values for the Hardscramble property be operationalized into guiding principles?

Methods

Data collection occurred through four main phases: phase 1- artifact collection and analysis; phase 2- formal meetings with gatekeepers; phase 3- formal interviews; and phase 4- verification strategies. Due to the exploratory character of this research, collection and analysis are concomitant and the chronology of these results is presented below.

Approach

This is a case study with a modified Delphi Approach. The goal of this research was to investigate the history of Mrs. Lloyd, the Hardscramble gift to Clemson University, and knowledge of her vision for the land in order to develop guiding principles for the stewardship of the land. The lack of action on the gift of land and associated endowment of \$2 million by Clemson University for over ten years, largely due to the economic downturn caused conflict and bad feelings with those who knew Mrs. Lloyd and many in the Camden community. In an effort to use research to solve this

problem, a combination of pragmatic and social constructivism approaches were employed.

This research case study (Stake, 1995) sought to discover any information written or otherwise pertinent to the understanding of the gift of Hardscramble from the date of the gift to the present and ongoing. A case study is particularly well-suited for the study of an event unfolding. In the spring of 2015, seven years after the gift and after Mrs. Lloyd's death, Clemson University started action on the Lloyd gift by initiating a search for an endowed chair.

In January of 2016, Dr. Rob Baldwin of Clemson University was appointed Conservation Biology/GIS Chair, Margaret H. Lloyd-SmartState Endowment of the Forestry and Environmental Conservation Department. With the endowment came the property and the responsibility of managing Hardscramble. Dr. Baldwin was given a binder with all known documents pertaining to the property in Camden. It quickly became clear that the stewardship of the land would require ecological, social and other expertise, and a need for guiding principles. This research aim was to define these principles in such a way that they incorporated the variety of sources for stewardship vision and conservation values of Hardscramble and develop them to adapt to other project and future changes for long-term conservation success.

Approaching conservation success for Hardscramble could only happen by including sources of knowledge found only with individuals close to Mrs. Lloyd at the time of her gift, and others from her community and family that understood her vision for Hardscramble. In-depth interviews were collected from six of these people, and a

modified Delphi approach was used to allow them to communicate about the variety of ideas anonymously (Steinert, 2009). The Delphi Method was developed by the RAND Corporation “in the 1950s, originally to forecast the impact of technology on warfare. The method entails a group of experts who anonymously reply to questionnaires and subsequently receive feedback in the form of a statistical representation of the "group response," after which the process repeats itself. The goal is to reduce the range of responses and arrive at something closer to expert consensus” (RAND, retrieved February 25, 2018).

In this exploratory approach, discernment of the researcher is not a fatal flaw while searching through the phenomenon but, rather, necessary to guide discussion. However, discernment necessitates rigor and to strive for accuracy with the best possible means available. To achieve this, multiple verification strategies were utilized intermittently throughout the research process. These methods included: reflexivity exercises at regular intervals; member-checking; maintaining an audit trail; inter-rater reliability; a modified Delphi Method; being careful not to offer leading questions; and searching for third-party evidence to confirm statements made by interviewees. Triangulation of data was the goal and every conceivable step was taken to ensure accuracy and rigor were used to develop the results.

Data Collection

Data collection occurred through four main sources: artifact collection and analysis, formal meetings with gatekeeper, formal interviews, and verification strategies.

Due to the exploratory character of this research, collection and analysis are concomitant and the chronology of these results is presented below.

Artifacts: August 2016- February 2018

With the large amount of money and the precedent-setting size of the property and donation to Clemson University, many documents were produced regarding the transfer and Mrs. Lloyd herself. Additionally, Mrs. Lloyd wrote a novel, developed an environmental education website, and did a television interview about her work.

Considering the researchers are outsiders to the social norms surrounding the project, purposeful methods were used to collect and analyze all the artifacts possible to develop a more robust idea of the land, the donation, and Mrs. Lloyd.

Gatekeepers: December 2016 and February 2017

Two formal meetings occurred with the intent to get all pertinent stakeholders, researchers, and interested parties in the same room to meet each other. This was mostly accomplished with the first five-hour meeting, and then fully completed after the second meeting two months later.

In-depth interviews: September 2017

Formal anonymous and confidential interviews were collected from participants with an in-depth knowledge of Mrs. Lloyd and her vision for her land Hardscramble, especially related to her gift of the land to Clemson University. Participants were identified through purposive methods and were recruited through email. The criteria for including interviewees was knowledge of Mrs. Lloyd or her family, knowledge of the

donation to Clemson University, and experience on the Hardscramble property. All requests for interviews were granted.

Between September 1, 2017 and October 1, 2017, five formal interviews occurred with identified stakeholders and gatekeepers. Each interview averaged approximately 1.5 hours, was anonymous and confidential, was recorded for audio, and transcribed.

Originally, 13 people were identified to interview but the five we interviewed were the individuals that met our criteria and agreed to the interview (n=5).

Data Analysis

Data analysis occurred in an iterative process. The three separate data collection methods occurred interdependently, and as new information was encountered, it helped inform the data collection of each of the other methods.

Artifacts

Notes were taken from each artifact and shared with the research team and compared with other artifact data. Some data was shared with gatekeepers as a way of stimulating conversation grounded in both legal documents as well as Mrs. Lloyd's words on video or writing. Some of these findings were used as sources for interview questions and some were presented by the family and others who knew Mrs. Lloyd and were made aware of this research project. All artifacts were treated as important and examined for information to aid in a more in-depth understanding of Mrs. Lloyd, her vision for Hardscramble, and to offer clues to unanswered questions about Clemson's stewardship of the land. The artifacts uncovered include: obituaries of both Mrs. and Mr. Lloyd; articles about Mrs. Lloyd; evidence of other donations; her novel Hortishland; a

public television interview; her website, Makeconnections.org; the conservation easement and associated legal documents; and property records. These artifacts, as well as a summary and description, are listed within the Appendix A. The primary benefit of these artifacts is that they provide a unique profile of Mrs. Lloyd independent of any one person's interpretation. Along these lines, the artifacts provide context and verifiable evidence to dates, locations, and items discussed in meetings and interviews.

Gatekeepers

Notes were collected by two sources at the first meeting and three at the second meeting. These notes were transcribed and used for forming interview questions and for identification of research participants, the analysis of the meetings and notes from these meetings also helped identify potential for conflict and frustration in effective conservation planning.

Several deliverables came out of these meetings. First and foremost, the process of the meeting itself was the most important deliverable. Giving everyone an opportunity to meet each other and discuss the project helped to establish trust. Additionally, there were critical facts and contextual information that were collected that could not be gathered in any other way. These are fully documented in Appendix A but the most relevant are: confirmation that the property is called Hardscramble; one of the most important gatekeepers exhibited interest and preliminary support of the project; and we learned that Mrs. Lloyd was originally going to donate the land to the Kershaw County School District. Further, the trajectory of research and planning for the land shifted

slightly to include different stakeholders as well as unforeseen artifacts, including new maps and archeological data.

In-depth interviews

A total of 8.5 hours of interviews were audio recorded and transcribed. Confidentiality and anonymity were kept for each interview and all identifying information was either excluded from the beginning or redacted upon subsequent review. Transcribed interviews were analyzed using MaxQDA software. MaxQDA is qualitative research software that facilitates the review and coding of multiple written documents. The organization of coded segments through all documents can be easily accessed and transferred to spreadsheets for development of thematic categories of the whole project. Inductive coding of transcribed interviews occurred. Within these transcribed interviews, 503 coded segments were identified. Some of the coded segments agreed with each other and others disagreed but all like-data was collected in categories. The coded segments were put through the process of thematic categorization after several rounds of analysis and three thematic categories were eventually developed.

Three thematic statements have been developed that combine data collected from interviews, artifact analysis, and stakeholder meetings. These thematic statements include: Portrait of a Conservation Philanthropist, a Vision for Activities on the Conservation Area, Recreation Generally. The thematic categories are simply categories of similar thoughts. Developing the thematic categories was a balance between combining like data and ensuring that not everything fit in any one category. It was a process of editing that is inherently biased. This bias is perceived as a strength and is

identified as “researcher discernment.” Throughout the interview process, it was made clear several times that interviewees had spoken with each other and others within the community. Incidentally, two interviews began with the interviewee telling the researchers that they had spoken to other interviewees about their interview. While extreme caution was used by the researchers to not share information from any specific interviewee, they were often aware that a discussion occurred.

Verification Strategies

Within qualitative research, inherent researcher bias is typically not detrimental to results; rather, it is seen as the discernment of a trained observer. In this exploratory approach, discernment is not a fatal flaw while searching through the phenomenon but necessary to guide discussion. However, discernment does necessitate the rigor of accuracy and to strive for accuracy with the best possible means available. To achieve this, multiple verification strategies were utilized intermittently throughout the research process. These methods included: regular reflexivity exercises; member-checking; the discipline of maintaining an audit trail; inter-rater reliability; modified Delphi Method; being careful not to offer leading questions; and searching for third-party evidence to confirm statements made by interviewees.

Triangulation of data to establish accuracy and focus researcher’s discernment. The process of consistent checking of researcher’s preconceived notions so that the language shared was accurately Mrs. Lloyd’s and not subtly the researcher’s perspective. Additionally, several statements and preconceived beliefs among interest groups, stakeholders, and gatekeepers were either verified or discounted through this process.

Results and discussion

Following the iterative methodology listed above, the following results have been produced.

Thematic Categories

Three thematic statements have been developed that combine data collected from interviews, artifact analysis, and stakeholder meetings. These thematic statements include: Portrait of a Conservation Philanthropist, a Vision for Activities on the Conservation Area, Recreation Generally.

1. Portrait of a Conservation Philanthropist: Mrs. Lloyd came from a wealthy family in Philadelphia and her father was a prominent entomologist who she revered. While she expressed interest in science because of her father, she was not allowed to attend university for science. She married Dick Lloyd, an innovative forester in 1943. They had four children before Dick Lloyd passed away in 1980. While the Lloyds, and Mrs. Lloyd in particular, had property in Cape Cod, Washington state, Santa Fe, Georgia, and New York City, she considered Camden home. She was friends with other wealthy people and gave regularly to charitable causes. In her fifties with her husband recently deceased, Mrs. Lloyd moved to New York alone with her ten-year old son and was wrestling with a two-year long suicidal depression when she had an epiphany that instantly pulled her out of her depression. Her epiphany empowered her to take control of the second part of her life and she enrolled at the Gallatin School of New York University and graduated with a bachelor's degree in geology in 1979 at

the age of 63. She also wrote a fantasy young-adult novel, created an environmental education website, spoke to high school students about environmental concerns, and eventually donated her property for preservation and environmental education to Clemson University. Everyone interviewed mentioned that Mrs. Lloyd was a memorable individual who “had an independent streak,” was very passionate about the natural world and educating children, and generous of spirit: "People like Margaret [are] pure of heart.”

Here are some regular quotes of hers as remembered by interviewees and found in artifacts:

- a. She realized that we’re all here for a specific period of time and we were either “users” or “givers”
- b. She used to say: “our job is to be stewards.”
- c. “We’re only here for a period of time and when that time is up we should have stewarded the land so that the next generation has the same love and beauty to share that we inherited.”
- d. She said, “I broke all the rules.”
- e. "She was hooked by “nature as teacher.””
- f. "She was always, the other part of that conversation was “what kind of connections did I see in nature that week, out there.” So those two things were probably the big parts of our conversation.... she always, always wanted to know the connections. "

- g. As she said, “there’s so many things people are looking for in life but what they see is right there in front of them, they just can’t see it.”
- h. “People look for themselves, they look for finding, you know, toys and things to make them happy but everything is right there in front of you if you just look.”
- i. “I’ve spent most of my life thinking I was going to find it somewhere else, but I ended up right where I started. I find it exactly where it always was, I just quit looking for a while.”

2. A Vision for Activities on the Conservation Area: By preserving Hardscramble and letting “nature do the work out there,” Mrs. Lloyd wanted to facilitate an individual’s quality natural experience by allowing “nature to be nature” through general environmental education for all ages but was personally “fascinated” with children under 15 years old. Striving for quality over quantity and opportunities to develop appreciation over passive engagement, Mrs. Lloyd’s land ethic would have valued education, land management, and recreational activities that honored the land’s resources. Regarding specific activities:

- a. **Type of Education:** Everyone interviewed, and all artifacts examined, agree that Mrs. Lloyd’s interest for the land was for both preservation of the land and for environmental education purposes, to ensure “experience and appreciation.” There was a consensus among all interviewees that she was concerned with educating people about general concepts of the

environment rather than anything specific; such as 4H summer camps or forestry education, for example. This concept can be summed up by the statement: “She would hope that all aspects of the environment would be addressed in some fashion and it be fairly, fairly broad.” However, there is disagreement explicitly among interviewees and implicitly among the artifacts about whether an age group or an audience was of particular interest. Some interviewees were rather adamant that Mrs. Lloyd was only interested in educating young children: “...she believed that if you didn’t expose them when they were children, under age 12, or under age 15, you lose them, you have to teach them early on about nature, that you are really a steward of the land, you don’t own it.” Others qualified that perspective more subtly when asked if she specifically wanted children to be educated: “I think it was for anybody, but I think her, you know, her, highest calling was, she absolutely loved watching the fascination of kids.”

- b. **Land Management:** “She was pretty adamant that nature do the work out there and not be so much the hand of mankind.” This statement summarizes the consensus of all interviewees regarding the perceived land ethic of Mrs. Lloyd. Conservation, preservation, and “nature for the sake of nature” are all concepts interviewees identified as part of her ethic concerning land management. One individual specifically mentioned that she “expected it to be managed like a refuge” while another said that Mrs.

Lloyd told them that she'd "like for the university to care for it in perpetuity."

- c. **Potential Development:** It is clear from all artifacts and interviews that industrial or commercial development on the property would not be part of the land ethic. "Golf courses," "business centers," and "Wal-Mart's" were not what Mrs. Lloyd valued. In her television interview, she herself stated there would be a building on the property for educational purposes. Regarding a building on the land for education purposes, "...she wanted a facility to be built out of there, like a pavilion or something of that sort, for educational opportunities for the children." As identified in the conservation easement and through interviews, she wanted all development to be "green" and as environmentally sustainable as possible. Regarding where to place the development: "If there were going to be buildings, then she wanted them to be at the top of the hill...I said: "Mrs. Lloyd, from a financial standpoint, people would pay a fortune, you know, to live close to the water." She said: "well, we don't want their fortune...they're not going to go near the water. That's for everyone to enjoy." ... if [there was to be] any kind of development, housing or anything there, to generate revenue for the management of the property, she wanted it up at the very top, as soon as you got off the road..."
- d. **Forestry:** Everyone we interviewed, and all artifacts examined, state that: "Wholesale clearcutting and just planting rows of pine trees would not be

what Mrs. Lloyd would have wanted.” However, there was a consensus that she would have approved of clearing dead trees “...with studies backing it ... but to keep it maintained in the natural state.” Activities like raking pine straw also seem to be within her land ethic if the integrity of the habitat could be maintained.

- e. **Benefit to Camden:** One person said they were certain she wanted Hardscramble to be a benefit to the Camden community but no one else mentioned it. The importance as a benefit to Camden was never identified in any artifacts encountered, and the statement could not be verified.

3. Recreation Generally: “You know, she’d love to have it open up, I could see her wanting it to where you’ve got some outdoor type classroom stuff. But also recreation for people, people could be hiking, biking, birdwatching, that kind of stuff ... you know because it is a unique place.” While recreation is not identified in any interviews or artifacts as an activity of primary concern for the land ethic, the most important idea for any activity on the land is: “...anything that led to greater understanding of nature, I think Mrs. Lloyd would be alright with.” Along these lines, the following statement summarizes the attitude shared by all interviewees toward recreation directly: “I think she would want, she would welcome the use of pretty much any use of recreation of the property as long as it, it was signifying appreciation of the property...” The only caveat to recreation or any activity on the land is: “Having high numbers of attendance is less of a

concern than having a higher, personal quality experience.” Three specific recreation activities were asked about directly:

- a. **Biking:** Besides the statement “anything that doesn’t look developed to her was a good neighbor,” everyone we asked said that biking would not be an activity she would have valued for the sake of biking. However, if bike trails could be created that focus on “experiencing things [rather than] speedily just zipping through things...”, that would fall within her land ethic.
 - i. She “would’ve gone for the horses” before the bikes. “She would lean much more toward people walking and experiencing things than speedily just zipping through things.”
 - ii. “I think anything that doesn’t look developed to her was a good neighbor.”
 - iii. "She wouldn't want you to go out there and create a mountain bike trail, she would want you to use it in its natural state"
- b. **Hunting:** It seems like hunting would be acceptable within the land ethic if it was sustainable, regulated, and not “to shoot a bobcat or a fox...”
 - i. She allowed hunting, she didn’t profit from it and she knew exactly who was doing it
 - ii. “What kind of hunting? ...Deer hunting. And turkey hunting. But, but if she thought you were going to shoot a bobcat or a fox, she...would have probably shot you...”

- c. **Paddling:** Only one person felt that they could speak directly to the activity of paddling and the only thing they mentioned was that they didn't think that a Wateree River paddling stop would be something within her land ethic.

Mrs. Lloyd's Land Ethic

Mrs. Lloyd's Land Ethic has been developed from the collected artifacts and thematic statements co-created with interviewees. Focusing on all relevant components of her life and the conservation property, the land ethic is meant to express Mrs. Lloyd's perspective about the environment, education, and social interactions. Developing someone else's land ethic is an incredibly presumptuous exercise that runs the risk of not only missing important aspects of Mrs. Lloyd's character and perspective but, even worse, putting words in her mouth and making assumptions for her. Guillemin (2004) recognizes just this situation as an "Ethically Important Moment" in the practice of research. To be mindful of these risks, all of the verification strategies listed above have been utilized in addition to using only Mrs. Lloyd's direct words have been analyzed and the thematic statements have been used as a verification strategy in which to ensure that everything agrees with each other. Three artifacts have been the most useful in developing Mrs. Lloyd's land ethic: her television interview, her novel, and the website she created. Of these, the novel explicitly states in a mature and refined way, the philosophy which she herself valued.

The resources of Hardscramble are the biotic, the abiotic, and the history of experience on the land. Each of these is connected and the essence of each

deserves reverence; not just the things themselves but also the connections between them. What is good, true, and beautiful are three in one and exhibiting compassion and reverence for the integrity of the resource is what is good, true, and beautiful. What allows the essence of the resource to thrive and be more of itself in its relationship to the other resources is what is good, true, and beautiful. Learning is one of the purposes of Being and seeking to understand the integrity of the relationships is what is viable, satisfying, and successful for the trajectory of any activity on Hardscramble.

It is important to keep in mind that a land ethic is an expression of values in a dialogue rather than gospel. Aldo Leopold, as the pre-eminent source for developing a land ethic, speaks to this directly. He concludes his Sand County Almanac (1970) with the following statement regarding authoritative hard and fast rules: “I have purposely presented the land ethic as a product of social evolution because nothing so important as an ethic is ever ‘written.’ Only the most superficial student of history supposes that Moses ‘wrote’ the Decalogue; it evolved in the minds of a thinking community, and Moses wrote a tentative summary of it for a ‘seminar.’ I say tentative because evolution never stops. // The evolution of a land ethic is an intellectual as well as emotional process” (p. 225).

In an attempt to inform the evolving dialogue optimally, a set of guiding principles have been constructed from the thematic categories, land ethic, and external documents.

Guiding principles for land management of Hardscramble

The thematic categories developed above identify the social factors surrounding the conservation area and the philanthropist. The socially co-constructed (Kim, 2001) land ethic helps identify the philosophical perspective that motivated the philanthropist and her gift. The information in the thematic categories mixed with the philosophy of the land ethic creates the thematic statements, listed below. Considering that the overall purpose of this research is to inform land management of future activities on the property, the thematic statements have been renamed Guiding Principles while using memorable aphorisms that the philanthropist herself shared widely. To make the Guiding Principles relevant to this particular conservation area, Hardscramble, but also the larger ecosystem that it is contained within, the philanthropist's language is utilized to translate objective conservation issues into regionally pertinent statements.

As a verification strategy to measure the ability of localized conservation values to work within larger conservation frameworks, other sources were used as a measure of completeness of values.

- The Ecological Society of America's Ecological Principles of Managing Land Use (Ecological Society, Retrieved March 03, 2018)
- Principles and Criteria for Sustainable Land Management (Columbia University, Retrieved March 03, 2018)
- Ten Principles for a landscape approach to reconciling agriculture, conservation, and other competing land uses (Sayer, 2013)
- The 13 Principles of Wilderness Management derived from Wilderness Management (Hendee and Dawson, 2002)
- Freeman Tilden's 6 principles of interpretation (Tilden, 2009)

In addition to these above sources, Mrs. Lloyd created Guiding Principles for the fictional characters in her novel, Hortishland (Lloyd, 2001). In fact, this was the original

motivation for developing Hardscramble’s Guiding Principles. In the text these are shared as spiritual commandments, they do parallel much of what has been unearthed from the interviews. The principles identified in the novel have been analyzed along with Mrs. Lloyd’s Land Ethic derived from thematic categories and juxtaposed with the Conservation Guiding Principles consulted above. All of these have been filtered and processed through memorable aphorisms that Mrs. Lloyd herself shared widely to make them relevant to this particular conservation project. This interpretation process consists of the vernacular component of eliciting the conservation values.

The conservation easement states that the easement “will prevent any use of the conservation property that will impair or interfere with the conservation values of the conservation property.” No conservation values are explicitly stated in the easement. However, one of the associated legal documents identifies certain geographical locations as conservation values. While these geographical values are important to the regional ecological context, the philosophical conservation values are pertinent to stewardship decisions. The land ethic and the guiding principles create the philosophical conservation values of the Hardscramble conservation area.

Guiding Principles:

- 1. Living in your Knowing:** What is good, true, and beautiful are three in one and exhibiting compassion and reverence for the integrity of the resource is what allows the essence of the resource to thrive and be more of itself in its relationship to the other resources. Knowledge derives from what is good, true, and beautiful

and this is what all land activities such as education, research, and development, should seek to discover.

2. **Nature as Teacher:** Learning is one of the purposes of Being and seeking understanding is the foundation of all relationships that are viable, satisfying, and successful. Nature is interconnectedness. Nature is the place where you can learn about what is true in yourself, the truth in the universe, and the connections with all other entities. Nature should be the primary source for expressing principle one, living in your knowing.
3. **Make Connections:** Every being is alone and yet is also part of every other being and the Universe and this connection is in everyone and everything. Seeking to understand expanding connections is of utmost importance and to do this, one must seek to learn and understand the connections through research and seek to share the connections through education.
4. **We're either Users or Givers and Our Job is to be Stewards:** Compassion is the greatest form and the true name of love; it is unconditional and asks for nothing and gives all. Honoring the resource as a steward and as a giver, rather than a user, is necessary for all activities on the land.

Conclusions:

The future of Hardscramble will involve research, environmental education, recreation activities, forestry, and more. Land management of this conservation area will need to appropriately balance these needs. The larger Hardscramble project will need to

also meet the legal stipulations of the conservation easement, involve and engage the local community, and achieve the mission of Clemson University. This is a delicate balancing act to accomplish while also honoring the legacy of the original donor, Mrs. Lloyd. Understanding the socially co-created and agreed-upon conservation values firms the foundation on which to place all of these divergent needs.

There are three main intrinsic contributions of this vernacular conservation research: pragmatic conflict resolution, useable land management data, and the history of the donation. Beyond these intrinsic benefits, there are limited yet valuable instrumental contributions to the scientific scholarship of vernacular conservation, small-landscape conservation, and conservation philanthropy, as well as the historical scholarship of female environmental leadership. Additionally, this project assists in establishing a foundation for the next steps of the larger Hardscramble research and recommendations for future research are stated below.

Intrinsic Value/Benefit

This vernacular conservation project has primarily been pragmatic, exploratory research to help progress the trajectory of the larger Hardscramble project. By eliciting the conservation values from the donor through artifact analysis as well as from the self-identified holders of her legacy through interviews, this project has achieved several objectives for the larger Hardscramble project. Primarily, with the discontent of the stakeholders and the clear legal clause stating that work plan will be developed and approved “within six months of receipt” there was an implicit threat of legal action against Clemson University. In addition to the inertia created by other projects that were

simultaneously begun in 2016 (e.g. forestry research, development, etc.), involving the stakeholders in this iterative process of co-creating the conservation values of the original donation seems to have neutralized the threat of legal action.

Secondly, not only was a potentially intractable conflict avoided and legal action abated, useable data was developed for guiding future land management decisions. This data can, if land managers decide to use it this way, inform pro-environmental behaviors on the land. Mrs. Lloyd's land ethic, the guiding principles, and thematic statements, are not comprehensive and they are also not based in the most current scientific understanding of conservation, ecology, forestry, etc. They are not meant to be. The data exist within the discipline of values and ethics and they are meant to inform the decision-making process of current and future land managers knowledgeable and well-versed in the best-available natural resource science.

Lastly, similar to informing the land management activities, eliciting the conservation values for the property distinguishes the type of environmental education and for what audience would be appropriate within the legacy of Mrs. Lloyd. In an attempt to honor Mrs. Lloyd and respect the community that perceives her legacy as contributing to the pride in their rich, historical, and philanthropic identity, this project ensures that Mrs. Lloyd's wishes are respected, and the appropriate audience is serviced.

Instrumental

As an inductive and exploratory pragmatic research project focused on a specific case study, this project has limited instrumental benefit and progresses scientific understanding for conservation purposes little. However, there are valuable contributions

to the scientific scholarship of vernacular conservation and conservation philanthropy, as well as the historical scholarship of female environmental leadership.

Vernacular conservation

This project contributes to the process of eliciting conservation values for the dual purpose of assuaging intractable environmental conflicts and socially co-creating land management principles for conservation areas. Utilizing vernacular conservation methods of facilitating local communities to give voice to their interpretation of the project's goals, this project empowers community engagement and helps stimulate support from pertinent gatekeepers.

Developing important thematic statements, a land ethic, and guiding principles with community members demonstrates interest and concern with the immediately effected community. Using the donor's and the community's own language allows the conservation process to be understood optimally. While there are larger and scientifically valid conservation needs, speaking to and integrating the needs of the community honors the resource and the people most immediately effected by the impacts of conservation efforts.

Conservation philanthropy

Where this research can assist other conservation philanthropy projects and associated research is the need for co-creating conservation values using vernacular methods with the donor or community. In addition, this project shows that immediate follow-through on implicit and explicit agreements toward action can help assuage potential conflict.

A lot of beliefs, emotions, and values are tied up in philanthropy. Other than financial incentives, giving is a passionate expression of a wealthy individual's interests. An individual's gift is motivated by their interest, care, and concern about items that have a lot of personal meaning, create self-identity, and develop an individual's worldview. Using their language and demonstrating action with the world-views they espouse engages their belief system and encourages appropriate conservation action with statements they've already agreed to.

The case study of the Hardscrabble donation contributes pragmatically to the stewardship of the conservation property. However, the vernacular conservation methods utilized benefit the academic dialogue of how to involve local communities, especially in the facilitation of transferring land from aging property owners to conservation-minded organizations. Using the methods outlined above to use the language of the philanthropist or community, conservation values can be co-constructed with land managers. Actively listening to and utilizing local vernacular to communicate beliefs and perceptions, a conservation professional can translate project-specific values into larger conservation values. Involving key people and understanding the socially co-created conservation values firms the foundation on which to place the divergent needs of a conservation project.

CHAPTER THREE

CONCLUSIONS

The future of Hardscramble will involve research, environmental education, recreation activities, forestry, and more. Land management of this conservation area will need to appropriately balance these needs. The larger Hardscramble project will need to also meet the legal stipulations of the conservation easement, involve and engage the local community, and achieve the mission of Clemson University. This is a delicate balancing act to accomplish while also honoring the legacy of the original donor, Mrs. Lloyd. Understanding the socially co-created and agreed-upon conservation values forms the foundation on which to place all of these divergent needs.

There are three main intrinsic contributions of this vernacular conservation research: pragmatic conflict resolution, useable land management data, and the history of the donation. Beyond these intrinsic benefits there are limited yet valuable instrumental contributions to the scientific scholarship of vernacular conservation, small-landscape conservation, and conservation philanthropy, as well as the historical scholarship of female environmental leadership. Additionally, this project assists in establishing a foundation for the next steps of the larger Hardscramble research and recommendations for future research are stated below.

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Secondly, not only was a potentially intractable conflict avoided and legal action abated, useable data was developed for future land management. This data can, if land managers decide to use it this way, inform pro-environmental behaviors on the land. Mrs. Lloyd’s land ethic, the guiding principles, and thematic statements, are not comprehensive and they are also not based in the most current scientific understanding of conservation, ecology, forestry, etc. But, they are not meant to be. The data exist within the discipline of values and ethics and they are meant to inform the decision-making process of current and future land managers, knowledgeable and well-versed in the best-available natural resource science.

Lastly, similar to informing the land management activities, eliciting the conservation values for the property distinguishes the type of environmental education, activities, and the audiences which would be appropriate to perpetuate the legacy of Mrs. Lloyd. In an attempt to honor Mrs. Lloyd and respect the community that perceives her legacy as contributing to the pride in their rich, historical, and philanthropic identity, this

project ensures that Mrs. Lloyd's wishes are respected, and appropriate audiences serviced.

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Historical scholarship of female environmental leadership

Within the history of the environmental movement there are few notable female leaders. Even fewer are lionized for their efforts as the men are generally perceived. The reasons for this are speculative and beyond the scope of this research, however the narrative of Mrs. Lloyd can contribute to the historical understanding of female environmental actors. Dorceta Parker (2016) makes the case that the Great Man theory of history - the heteronormative archetype of a lone, male hero fighting against an indifferent, immoral, or less advanced world - is a revolutionary trope that a Western society is not only more receptive to but also active in co-creating the perpetuating myth.

Within her alternative environmental narrative, Parker says that no conflict of meaning is that simplistic and, concomitantly, there is such a rich history of exactly the opposite that a more accurate depiction of the environmental struggle is one of groups of individuals, women, minorities, and the poor progressing environmental causes. Sharing Mrs. Lloyd's narrative has the capacity to further this alternative perspective of the environmental struggle's history. The integration of the patriarchal male figures in her life as manifested through her father and husband, marital discontent, and her "fiery" character juxtaposed within Southern gentility can contribute to a better understanding of historical expression of motivations and undercurrents of environmental conflicts.

The case study of the Hardscramble donation contributes pragmatically to the stewardship of the conservation property. However, the vernacular conservation methods utilized benefit the academic dialogue of how to involve local communities, especially in the facilitation of transferring land from aging property owners to conservation-minded organizations. Using the methods outlined above to use the language of the philanthropist or community, conservation values can be co-constructed with land managers. Actively listening to and utilizing local vernacular to communicate beliefs and perceptions, a conservation professional can translate project-specific values into larger conservation values. Involving key people and understanding the socially co-created conservation values firms the foundation on which to place the divergent needs of a conservation project.

Suggestions for Next Steps:

This vernacular conservation research into eliciting values for a conservation property has helped build a foundation for the lifespan of an important project, if for no other reason than being one of the first formal research projects involving the land. With the mission of Clemson University, the stipulations of the conservation easement, and the conservation values identified here, it is clear that future projects will involve environmental education and research. Listed below are some of the concepts that were revealed throughout the development of this exploratory project that could be meaningful for both the intrinsic and instrumental benefit of this project.

- If the purpose of Hardscramble is to preserve the land and provide environmental education and research, it might be helpful to identify the conservation values of the Camden community, the educational needs of the larger area, and the ecological needs at the large-landscape scale. Identifying the needs on the larger scale and comparing them to the land ethic.
- Finding the gap between the Hardscramble Land Ethic and the community's land ethic for the purposes of understanding and parlaying future potential environmental conflicts
- Applying a socio-ecological systems study of the conservation property to understand the system as a whole
- Develop pragmatic goals and objectives based on the guiding principles for the conservation property that are both short- and long-term, measurable, and relevant to the property and the larger landscape

- Using the conservation property and the project as a socio-cultural laboratory to attempt to understand a region's conservation values
- The conservation property has terrific attributes and using the property as a laboratory to practice innovative conservation strategies with Coupled-Human and Natural system

Final Thoughts

This was a true qualitative research project. The process was as important as the results to the goals of the larger project throughout this research. Not only did we not know that we were searching for the conservation values, but we could not have known that the conservation values were the critical component without the exploratory process. Further, if we had approached the key people as if we were more knowledgeable than them, or even if we had presented our original perceived problems as the *big* problems, we would have alienated key stakeholders. Exhibiting equanimity and withholding judgment as we collected evidence with discernment at each stage was necessary for data collection and developing trust and rapport, so that we could deepen our understanding of Mrs. Lloyd, and the many stakeholders of Hardscrabble.

APPENDICES

Appendix A

Artifact Discovery

Listed below are the artifacts that were discovered, a summary and description, and deliverables, if applicable. Also listed are the takeaways from the formal meetings and site visits.

Introduction

With the large amount of money and the precedent-setting size of the property and donation to Clemson University, many documents were produced regarding the transfer and Mrs. Lloyd herself. Additionally, Mrs. Lloyd wrote a book, developed a website, and did an interview about her work. Considering the researchers are outsiders to the social norms surrounding the project, purposive sampling methods were needed to collect and analyze all the artifacts possible to develop a more robust idea of the land, the donation, and Mrs. Lloyd. The artifacts include: obituaries of Mr. Lloyd's death; articles about Mrs. Lloyd; her book *Hortishland*; a public television interview; her website, Makeconnections.org; and property records. These artifacts as well as a summary and description are listed below.

Obituaries

- **Summary and Description**

Three obituaries provided a description of the highlights and civic contributions of Ms. Lloyd. These documents were collected by Dr. Betty Baldwin prior to August 2016 and were the basis for all other research and development of an initial profile of Ms. Lloyd.

Articles about Mrs. Lloyd

- **Summary and Description**

A press release of the donation and a Clemson article about the honorary doctorate given to Mrs. Lloyd were discovered. Additionally, a document awarding Mr. Lloyd as the South Carolina Conservationist of the Year was also found.

Hortishland

- **Summary and Description**

In the late 1990s a longtime dream of Ms. Lloyd's came together. She wrote and published a young adult environmental novel. *Hortishland* is the mystical land that exists in a parallel and concurrent world with our own. The people of *Hortishland* are forced to confront their unsustainable behaviors and in the process discover that they have the capacity to view into our world and positively influence behaviors of humans here as well. The story is a circuitous bildungsroman following the lives of a couple *Hortishes* trying to keep their family together and healthy in their consistently threatened community.

Lloyd uses Hortishland as a parable to demonstrate that unsustainable decisions compile, compound, and contribute to an unhealthy relationship with others and the global community. This story is a creative example of Ms. Lloyd's vision, of how Ms. Lloyd envisions an agrarian utopia. Besides presenting a distilled and consciously deliberated fantasy philosophy of Mrs. Lloyd's deontology, "guiding principles" for the Hortishes are explicitly listed near the end of the text. These two components – a philosophy and guiding principles – are the main contributions of the novel to eliciting conservation values for the Hardscramble project.

Public Television Interview

- **Summary and Description**

In the early 2000s a public television show host interviewed Ms. Lloyd. The 30-minute interview focuses on her life, her book, her civic contributions, and her conservation area called Hardscramble. The interviewer discusses Ms. Lloyd's philosophy and motivation behind her Pro-Environmental Behaviors and attempts to get at the essence of what drives Ms. Lloyd. Through several statements, Ms. Lloyd shares that "living in your knowing" is the idea she is trying to share and champion through her works. For her, she says, this means listening to an inner source and trusting individual intuition independent of social filters.

One of the most important aspects of this interview was discovering that in her mind the Hardscramble property and her book have different purposes. Her book is meant to educate young children while her land is meant to provide habitat with an interpretive component. The other contributions of discovering this interview is that it was helpful for the researchers to hear Mrs. Lloyd's own words and experience her strong personality and sharing this interview with interviewees and people at the formal meetings helped develop trustworthiness.

Makeconnections.org

- **Summary and Description**

Ms. Lloyd's obituaries stated that she developed an environmental education website in the early 2000s. An internet archive search uncovered that she hired a web designer to create Makeconnections.org and the shell of the now-defunct website was found. No longer functional, the site attempted to demonstrate the connections between children of various cultures and different ecosystem services. Inherent to her personal life philosophy, the idea of making connections between various, interdependent parts is a recurring trope within other artifacts and throughout the formal interviews.

Maps

- **Summary and Description**

Twelve maps of the Hardscramble property were uncovered by Dr. Rob Baldwin in late autumn 2016. After digitizing them at the Clemson University Library the originals were returned. Analysis of the maps has shown a variety of characteristics of the land. Several items of note appeared through analysis: the actual name of the land is listed as Hard

Scramble, Hard Scramble, and Hardscramble; the location of several of the important places as identified by the conservation easement are shown; and an inventory of flora and fauna, as well as abiotic characteristics is listed.

The maps have been most useful as communication and display purposes.

Property Records

- **Summary and Description**

After visiting Camden in early September 2017, researchers made a visit to the Kershaw County Records Office. Research into the property records demonstrated ownership back to 1917. Older ownership records were not found.

Jan 1, 1917 - Land auctioned to Ralph Ellis for \$8,900.00

- Because of a complaint on the 8th of September 2016 by Thomas J. Kirkland against Ralph Ellis, Peruvian Guano Corporation, Bank of Columbia, and [at least two other illegible entities] the land was auctioned to Ralph Ellis for \$8,900

May 3, 1928 – Ralph Ellis sold it to Webster Bray Todd for \$50,000.00

- Ellis sold the land to Todd of Jericho, Long Island, New York
- First Reference of “Hard Scramble Place”

September 25, 1944 – Todd sold the land to Mrs. Lloyd for \$12,000.00

- Eleonor Schlay Todd (wife of W.B. Todd) is listed on the document as the signer instead of Webster Bray Todd
- A Charles E. Lane is mentioned as accompanying Eleonor Todd

March 16, 2006 – Mrs. Lloyd donated the land to Clemson University Real Estate Foundation

- Appraised at \$7.75 million

Stakeholder Meetings

- December 17, 2016
 - Purpose:
 - Get all stakeholders, researchers, and interested parties in the same room to meet each other
 - Share Rob’s idea of an academic’s retreat on the property
 - Takeaways:
 - Learned about the rarity of longleaf pine
 - confirmed that the property is called Hardscramble

In December 2016, the first meeting of pertinent stakeholders and gatekeepers occurred at Clemson University. The goals of the interdisciplinary meeting were: 1. to get everyone relevant to the project, within Clemson University and outside the school,

together in the same room, 2. to share the interdisciplinary work accomplished on the project, and 3. to get a general consensus from participants on how to proceed. Dr. Betty Baldwin started the meeting with an exercise getting the 15 participants to reflect on the meaning of home and a subjectively important place. The participants wrote their reflections and the stories were collected at the end of the meeting and typed for record-keeping purposes. The participants all stated that this exercise was helpful in priming the engagement for the two-hour meeting. After this exercise, three presentations were shared with the group. The first presentation was a summary of the ecological research of Longleaf Pine (*Pinus palustris*) conducted on site by the forestry department, the second presentation was a summary of the abovementioned artifacts relating to Hardscramble and Mrs. Lloyd, and the final presentation was an environmental history of the area and potential future use of Hardscramble. A group discussion of legal constraints, possible outcomes, relevant issues, and the logistics of how to proceed were discussed throughout the meeting and after. Extensive notes of the meeting by two separate researchers were collected and typed afterwards.

This meeting went well and all goals were met.

- February 1, 2017
 - Purpose:
 - Introduce project and project team to Bob Sheheen
 - Takeaways:
 - Bob Sheheen exhibited interest, if not preliminary support, of our project

The next meeting was planned for a more public atmosphere in Camden for late February 2017. The participants were intended to be local interested parties and some stakeholders. When the plan was presented to a gatekeeper who could not attend the December 2016 meeting, uncertainty and distrust over the intention of the meeting prohibited critical approval. Instead of a more public meeting in Camden, a second consensus-seeking and planning meeting that replicated the first December meeting for the purpose of this individual was conducted in early February 2017 at Clemson University. The same presenters shared their work but there were only three other participants. Although the participation was much smaller, the presentations invoked greater impact and significant information was elicited from longer discussions.

We learned that she was originally going to donate the land to the Kershaw County School District. This will need to be explored during the interview portion. Further, the trajectory of research and planning for the land shifted slightly to include different stakeholders as well as unforeseen artifacts, including new maps and archeological data. As of March 2017, conducting public meetings has been temporarily paused while more ecological, archeological, and social science research will be conducted. Additionally, an outreach plan and formal environmental education development and research project has been added to the interdisciplinary team that will impact and influence each of the other disciplines involved.

Site Visits

From September 2016 to November 2017, a total of five site visits occurred. Each of these site visits had different purposes, were conducted with different researchers, and were of varying lengths of time. Each of the visits, the purpose, and the takeaways of the site visits is listed below.

- December 21 2016
 - Purpose:
 - Initial visit to find the property
 - Takeaway:
 - learned where site is and where the accessible boundaries are
- June 2017:
 - Purpose:
 - meet alex Shrier, longleaf pine researcher
 - see characteristics of property, specifically longleaf pine
 - Takeaways:
 - photos of longleaf
 - discuss ecology of longleaf pine and it's impact on the property
- July 2017
 - Purpose:
 - Meet Coy, contracted forester for the property
 - take photos of site for website
 - Takeaways:
 - saw entire property
 - learned about history
 - got photos
- September 2017
 - Purpose:
 - interview stakeholders
 - visit Kershaw County office
 - Takeaways:
 - discovered property record history
 - conducted interviews
- November 2017
 - Purpose:
 - Discuss biking opportunities
 - Meet former mayor, Jeff Graham
 - Takeaways:
 - discovered indian springs
 - saw new parts of the land

Appendix B

Modified Delphi Method Document

Background

The following document was developed with data collected through the coding process of the transcribed interviews as well as analysis of the artifacts. The document was developed using quotes from each of the interviewees as well as Mrs. Lloyd's own words. In January 2018 this document was emailed to the interviewees for review and they were given two weeks to review the document and submit feedback. Each interviewee was told that these were preliminary results and that we were attempting to combine all of the data collected into a coherent narrative to inform the future land management and activity on Hardscramble.

The response from the interviewees was positive for the preliminary results. All interviewees that responded stated that the document interpreted the narrative well. Minimal changes were recommended from a few interviewees but nothing counter to any of the preliminary results.

After these preliminary results were verified by the interviewees, they were then incorporated into the results of our research. This process required editing and distilling the information but nothing significant was changed, other than form, in the process

Introduction

Listed in this document are the preliminary results and analysis from the artifact research and interviews conducted over the past 16 months. Throughout this process we've uncovered a lot about Mrs. Lloyd and the Hardscramble property. Originally, we wanted to see what Mrs. Lloyd's Land Ethic was but as the project matured we adapted. Mostly, this transition occurred because of what we re-read in the conservation easement after doing our interviews and looking at the artifacts again. While there was much in the conservation easement and legal documents, something similar to a "mission, vision, and values" statement was not included. Without this, confusion on how to proceed with long-term strategy as well as independent daily decisions will occur. In the research process of collecting artifacts and conducting interviews, we found that the conservation easement document states that decisions for management will be in accordance with the project's "conservation values." However, no conservation values are specifically identified. Therefore, this research project transitioned from the original, temporary research question of "What was Mrs. Lloyd's Land Ethic?" to "What are the Conservation Values for Hardscramble?" To establish the conservation values for Hardscramble, the data retrieved from the artifacts, meetings, and interviews was analyzed and disseminated into thematic statements which helped develop Mrs. Lloyd's Land Ethic and Hardscramble guiding principles.

Thematic Statements

Six thematic statements have been developed that combine data collected from interviews, artifact analysis, and stakeholder meetings. These thematic statements include:

1. Conservation Property
2. Activity on the Conservation Property
3. Camden
4. The Lloyd Family
5. Clemson University
6. Mrs. Lloyd

1. Conservation Property:

Hardscramble is 853 acres of riverfront property in Camden, South Carolina that has a long history of ecological and cultural importance dating back to indigenous people. Hardscramble contains approximately a half-dozen sensitive habitats and unique characteristics. The land was purchased in 1944 by Mrs. Lloyd for \$12,000 and donated to Clemson University in 2006 at an appraised \$7.5 million. Commercial, residential, and industrial development pressures have been steadily increasing around the property since her purchase in 1944. The origination of the name Hardscramble and the circumstances of Mrs. Lloyd's original acquisition of the land -as well as property history prior to 1917- are unknown.

2. Activity on the Conservation Property:

By preserving Hardscramble and letting "nature do the work out there," Mrs. Lloyd wanted to facilitate an individual's quality natural experience by allowing "nature to be nature" through general environmental education for all ages but was personally "fascinated" with children under 15 years old. Striving for quality over quantity and opportunities to develop appreciation over passive engagement, Mrs. Lloyd's land ethic would have valued education, land management, and recreational activities that honored the land's resources. In regards to specific activities:

- **Type of Education:** Everyone interviewed and all artifacts examined agree that Mrs. Lloyd's interest for the land was for both preservation of the land and for environmental education purposes, to ensure "experience and appreciation." There was a consensus among all interviewees that she was concerned with educating people about general concepts of the environment rather than anything specific; such as 4H summer camps or forestry education, for example. This concept can be summed up by the statement: "She would hope that all aspects of the environment would be addressed in some fashion and it be fairly, fairly broad." However, there is disagreement explicitly among interviewees and implicitly among the artifacts about whether an age group or an audience was of particular interest. Some interviewees were rather adamant that Mrs. Lloyd was only interested in educating young children: "...she believed that if you didn't expose them when they were children, under age 12, or under age 15, you lose them, you have to teach them early on about nature, that you are really a steward of the land,

- you don't own it." Others qualified that perspective more subtly when asked if she specifically wanted children to be educated: "I think it was for anybody but I think her, you know, her, highest calling was, she absolutely loved watching the fascination of kids."
- **Land Management:** "She was pretty adamant that nature do the work out there and not be so much the hand of mankind." This statement summarizes the consensus of all interviewees regarding the perceived land ethic of Mrs. Lloyd. Conservation, preservation, and "nature for the sake of nature" are all concepts interviewees identified as part of her ethic concerning land management. One individual specifically mentioned that she "expected it to be managed like a refuge" while another said that Mrs. Lloyd told them that she'd "like for the university to care for it in perpetuity."
 - **Potential Development:** It is clear from all artifacts and interviews that industrial or commercial development on the property would not be part of the land ethic. "Golf courses," "business centers," and "Wal-Marts" were not what Mrs. Lloyd valued. In her television interview, she herself stated there would be a building on the property for educational purposes. Regarding a building on the land for education purposes, "...she wanted a facility to be built out of there, like a pavilion or something of that sort, for educational opportunities for the children." As identified in the conservation easement and through interviews, she wanted all development to be "green" and as environmentally sustainable as possible. In regards to where to place the development: "If there were going to be buildings, then she wanted them to be at the top of the hill...I said: "Mrs. Lloyd, from a financial standpoint, people would pay a fortune, you know, to live close to the water." She said: "well, we don't want their fortune...they're not going to go near the water. That's for everyone to enjoy." ... if [there was to be] any kind of development, housing or anything there, to generate revenue for the management of the property, she wanted it up at the very top, as soon as you got off the road..."
 - **Forestry:** Everyone we interviewed, and all artifacts examined, state that: "Wholesale clearcutting and just planting rows of pine trees would not be what Mrs. Lloyd would have wanted." However, there was a consensus that she would have approved of clearing dead trees "...with studies backing it ... but to keep it maintained in the natural state." Activities like raking pine straw also seem to be within her land ethic as long as the integrity of the habitat could be maintained.
 - **Benefit to Camden:** One person said they were certain she wanted Hardscrabble to be a benefit to the Camden community but no one else mentioned it, the importance as a benefit to Camden was never identified in any artifacts encountered, and the statement could not be verified.
 - **Recreation Generally:** "You know, she'd love to have it open up, I could see her wanting it to where you've got some outdoor type classroom stuff. But also recreation for people, people could be hiking, biking, birdwatching, that kind of stuff ... you know because it is a unique place." While recreation is not identified in any interviews or artifacts as an activity of primary concern for the land ethic, the most important idea for any activity on the land is: "...anything that led to greater understanding of nature, I think Mrs. Lloyd would be alright with." Along these lines, the following statement summarizes the attitude shared by all interviewees toward recreation directly: "I think she would want, she would welcome the use of pretty much any use of recreation of the

property as long as it, it was signifying appreciation of the property..." The only caveat to recreation or any activity on the land is: "Having high numbers of attendance is less of a concern than having a higher, personal quality experience." Three specific recreation activities were asked about directly:

- **Biking:** Besides the statement "anything that doesn't look developed to her was a good neighbor," everyone we asked said that biking would not be an activity she would have valued for the sake of biking. However, if bike trails could be created that focus on "experiencing things [rather than] speedily just zipping through things...", that would fall within her land ethic.
 - She "would've gone for the horses" before the bikes. "She would lean much more toward people walking and experiencing things than speedily just zipping through things."
 - "I think anything that doesn't look developed to her was a good neighbor."
 - "She wouldn't want you to go out there and create a mountain bike trail, she would want you to use it in its natural state"
- **Hunting:** It seems like hunting would be acceptable within the land ethic as long as it was sustainable, regulated, and not "to shoot a bobcat or a fox..."
 - She allowed hunting, she didn't profit from it and she knew exactly who was doing it
 - What kind of hunting? "Deer hunting. And turkey hunting. But, but if she thought you were going to shoot a bobcat or a fox, she...would have probably shot you..."
- **Paddling:** Only one person felt that they could speak directly to the activity of paddling and the only thing they mentioned was that they didn't think that a Wateree River paddling stop would be something within her land ethic.

3. Camden

Camden is a small town of approximately seven thousand people located southeast of Columbia, the capitol of South Carolina. Originally Camden was home to the Wateree native people and was initially called Fredericksburg by the British. Fredericksburg was one of the only in-land townships established by King George II in the early 1700s and after the American Revolutionary War was renamed Camden. The people of Camden are proud of their long American history. As a bedroom community of the state's capitol, Camden has a history of politically relevant people; philanthropic engagement from passionate funders; and an interest in horses, timber, and development. As wealthy land owners, the Lloyds raised their family in this community and were active in civic activities as well as local forestry. The Lloyds contributed to the Fine Arts Center and Dick Lloyd started the South Carolina Forestry Association in addition to creating the state's first conservation easement. Several interviewees mentioned that the Lloyds were "well regarded" in Camden and two interviewees stated that Camden "high society... was

not at all convinced that that gift [of Hardscramble to Clemson University] was in Mrs. Lloyd 's best interest.”

4. Lloyd Family

The Lloyd family consists of Margaret and Dick Lloyd and their four children: Margaret “Miggie,” Dickon, Susan, and Perry. While the Lloyds were wealthy landowners with properties around the country, they raised their family in Camden, South Carolina. The Lloyd children call themselves the G2, as in “Generation 2,” and their parents are G1 while the grandchildren are G3. At one point the G1 owned approximately 25,000 acres of property around Camden which has since been put in trust, inherited by the G2 and G3, or sold. The G2 live all over the country and return to Camden as a family semi-annually. All interviewees agree that “as a family they have exhibited environmentally-minded behavior such as “carbon credit stuff” and aversion to “chemical site work.” The family continue to be mindful of the environmental impact of their land. Mrs. Lloyd had a strong environmental ethic that matured throughout her life and her husband, Dick, was an innovative forester who created South Carolina’s first conservation easement and also co-founded the South Carolina Forestry Association.

5. Clemson University:

In the early 2000s, Mrs. Lloyd was looking to protect her property into perpetuity and provide environmental education with the unique characteristics of Hardscramble. Initially she wanted to give the land to the local school district but was advised against that strategy, which led to the creation of an environmental education focused company, Hard Scramble Inc, as a back-up plan. Shortly thereafter Mrs. Lloyd was introduced to Dr. John Kelly, vice president for economic development for Clemson University and several years of discussion began the process of donating the property to the University for preservation, education, and research. In 2006, the 853 acres, appraised at \$7.5 million, was donated to the school with an additional \$2 million to provide for a Smart-State endowed professorship. The land was also put under a conservation easement held by the Congaree Land Trust. While the 853 acres were set aside for preservation, 100 acres were allowed to be removed for the purposes of raising funds for Clemson’s mission. These 100 acres have development restrictions to “green” residential purposes and are floating yet need to be contiguous, meaning the location within the larger 853 acres can be mutually agreed upon but must stay together as one property. One of the stipulations of the donation was that activity must occur within one year of transfer in 2006 and there was no measurable activity until 2016 due, partially, to the recession of 2008. At the time, the donation of Hardscramble and additional \$2 million was the largest land donation to Clemson University. The size of the donation, the additional \$2 million, and the decade of inactivity by Clemson University led some influential people in Camden to distrust the school’s intentions and process.

6. Mrs. Lloyd

Mrs. Lloyd came from a wealthy family in Philadelphia and her father was a prominent entomologist who she revered. While she expressed interest in science because of her

father, she was not allowed to attend university for science. She married Dick Lloyd, an innovative forester in 1943. They had four children throughout their marriage before Dick Lloyd passed away in 1980. While the Lloyds, and Margaret in particular, had property in Cape Cod, Washington state, Santa Fe, Georgia, and New York City, she considered Camden home. She was friends with other wealthy people and gave regularly to charitable causes. In her fifties and with her husband recently deceased, Mrs. Lloyd moved to New York alone with her ten-year old child and was wrestling with a two-year long suicidal depression when she had an epiphany that pulled her out of her depression. Her epiphany empowered her to take control of the second part of her life and she enrolled and graduated with a bachelor's degree in geology from Gallatin School of New York University in 1979 at the age of 63, wrote a young adult novel, created an environmental education website, spoke to high school students about environmental concerns, and eventually donated her property for preservation and environmental education to Clemson University. Everyone interviewed mentioned that Mrs. Lloyd was a memorable individual who "had an independent streak," was very passionate about the natural world and educating children, and generous of spirit: "People like Margaret [are] pure of heart."

Here are some regular quotes of hers as remembered by interviewees and found in artifacts:

- She realized that we're all here for a specific period of time and we were either "users" or "givers"
- She used to say: "our job is to be stewards."
- "We're only here for a period of time and when that time is up we should have stewarded the land so that the next generation has the same love and beauty to share what we inherited."
- She said, "I broke all the rules."
- "She was hooked by "nature as teacher."
- "She was always, the other part of that conversation was "what kind of connections did I see in nature that week, out there." So those two things were probably the big parts of our conversation....she always, always wanted to know the connections. "
- As she said, "there's so many things people are looking for in life but what they see is right there in front of them, they just can't see it."
- She said: "People look for themselves, they look for finding, you know, toys and things to make them happy but everything is right there in front of you if you just look."
- "I've spent most of my life thinking I was going to find it somewhere else, but I ended up right where I started. I find it exactly where it always was, I just quit looking for a while."

Mrs. Lloyd's Land Ethic

Mrs. Lloyd's Land Ethic has been developed from the collected artifacts and thematic statements co-created with interviewees. Focusing on all relevant components of her life and the conservation property, the land ethic is meant to express Mrs. Lloyd's perspective about the environment, education, and social interactions. Developing someone else's

land ethic is an incredibly presumptuous exercise that runs the risk of not only missing important aspects of Mrs. Lloyd's character and perspective but, even worse, putting words in her mouth and making assumptions for her. In an attempt to be mindful of these risks, only Mrs. Lloyd's direct words have been analyzed and the thematic statements have been used as a verification strategy in which to ensure that everything agrees with each other. Three artifacts have been the most useful in developing Mrs. Lloyd's land ethic: her television interview, her novel, and the website she created. Of these, the novel explicitly states in a mature and refined way, the philosophy which she herself valued.

The resources of Hardscramble are the biotic, the abiotic, and the history of experience on the land. Each of these is connected and the essence of each deserves reverence; not just the things themselves but also the connections between them. What is good, true, and beautiful are three in one and exhibiting compassion and reverence for the integrity of the resource is what is good, true, and beautiful. What allows the essence of the resource to thrive and be more of itself in its relationship to the other resources is what is good, true, and beautiful. Learning is one of the purposes of Being and seeking to understand the integrity of the relationships is what is viable, satisfying, and successful for the trajectory of any activity on Hardscramble.

Guiding principles for land management of Hardscramble

The conservation easement states that the easement “will prevent any use of the conservation property that will impair or interfere with the conservation values of the conservation property.” No conservation values are explicitly stated in the easement or any associated legal documents however. The land ethic and the guiding principles create the conservation values referenced in the conservation easement.

Guiding Principles:

5. Living in your Knowing
 - a. Definition: What is good, true, and beautiful are three in one and exhibiting compassion and reverence for the integrity of the resource is what allows the essence of the resource to thrive and be more of itself in its relationship to the other resources. All activities on the land must derive from what is good, true, and beautiful and this is where knowledge comes from.
 - b. Living in your knowing describes what should be done on the land and the morality of the various activity decisions
 - i. Research should seek to discover what is good, true, and beautiful for the land
 - ii. Education should seek to share what is good, true, and beautiful for the land
 - iii. All development and activity should be in concert with the knowledge of what is good, true, and beautiful for the land
6. Nature as Teacher

- a. Definition: Learning is one of the purposes of Being and seeking understanding is the foundation of all relationships that are viable, satisfying, and successful. Nature is the place where you can learn about what is true in yourself, the truth of the universe, and the connections with all other entities.
 - b. Nature should be the primary source for expressing principle one, living in your knowing
7. Make Connections
- a. Definition: Every being is alone and yet is also part of every other being, as well as one with the Light and the Universe that know all and is in everyone and everything
 - b. Seeking to understand expanding connections is of utmost importance and to do this, one must:
 - i. learn about the constituents of a system
 - ii. learn about the connections of the constituents
 - iii. learn how the system of the constituents works
 - iv. learn how you the learner interacts with the system of constituents
 - v. learn how the learner and the system works with other systems
 - c. Research should seek to understand the connections
 - d. Education should seek to share the connections
8. We're either Users or Givers and Our Job is to be Stewards
- a. Definition: Compassion is the greatest form and the true name of Love. It is unconditional. It asks for nothing and gives all.
 - b. Honoring the resource as a steward and as a giver rather than a user is necessary for all activity on the land

Appendix C

Evolution of research questions

The exploratory nature of this pragmatic research necessitated flexibility throughout the evolution of the project. We didn't know what we didn't know, and qualitative research is ideal for this type of exploration. To facilitate this, surrogate or placeholder research questions were used as we gathered more information. Each time more data was collected, we addressed the question and whether the data answered the question and if the research question was still relevant to the larger concerns of the project. Listed below is the chronology of the evolution of our research questions with a description of why that question guided us.

The conversation about the exploratory nature is important for two reasons: 1 – seeing that our research questions evolved helps explain why we included and excluded certain data; and 2- the evolution shows the interplay, the dialogue between data we collected and the paradigm frame we were working within.

- What would Mrs. Lloyd Do?
 - August 2016
 - This is the first concept of what we were trying to figure out
 - We were considering framing this research as case studies of female environmental leadership at this stage
- What is Mrs. Lloyd's vision of Hardscramble?
 - October 2016
 - With little knowledge of Mrs. Lloyd, the property, or the situation, we knew this was one of the main problems
 - Around this time, we started to realize that Lloyd's personal philosophy might directly inform land management of the property. Additionally, we were discovering more about the philanthropy aspect of the research and were considering framing the project as an example of conservation investment.
- What is the land ethic of Mrs. Lloyd?
 - May 2017
 - Almost nine months of artifact collection and analysis demonstrated that Mrs. Lloyd had a personal land ethic that had yet to be formally developed. We felt answering this could provide a foundation for the rest of the project.
 - We realized that the biggest need was how a land manager could proceed with stewardship decisions on the land. Furthering the discussion of Lloyd's personal philosophy, this project made the transition to being heavy on the pragmatic aspect.
- How can we operationalize Mrs. Lloyd's land ethic?
 - August 2017
 - It became clear that developing a land ethic may be too simplistic for this research and tangible deliverables would be needed to progress the overall

Hardscramble project. The proposed and desired activities on the land were elucidated and the instrumental nature of Mrs. Lloyd's ethic became clear.

- What are the conservation values for Hardscramble?
 - December 2017
 - After collecting all data and conducting all interviews, the review process began. Only in this review and development of preliminary results to share in the modified Delphi Method did it become clear that the primary clarification was needed in the original legal documents, through their identification of the conservation values. The conservation easement specifically identifies actions that are possible, and which are not in accordance to the "conservation values" of the property, yet no conservation values are identified. It seemed that much of the perceived dissatisfaction, confusion of ML's desire for the land, and land management directives could be assuaged with the key people/researcher co-creation of the conservation values by identifying important thematic statements, Lloyd's land ethic, and the guiding principles.

In addition to the evolution of the primary research question, the importance of the problem we were trying to address was uncertain throughout the entire process also. From the beginning, several components were uncertain; it was unclear which was the most prominent issue or how the following perceived problems were connected. For example, why didn't the larger Hardscramble project start within the 6months/1 year that it was supposed to begin within?

- What should be done on the land?
- What should be done with the money from the endowment?
- Why is there a vague feeling of distrust and animosity of people in the study site community?
- Why do key people continue to reference community dissatisfaction?
- Why is Mrs. Lloyd as a personality so important to the conservation project?
- What is the actual name of the property – Hard Scrabble, Hard Scramble, Hardscramble, Hard Scramble Connections, or something else?
- How real is the threat of legal action from Mrs. Lloyd's descendants?

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