



Key Element **2**

Strategic Thinking



FLICKR / 2THEGALAPAGOS

Willapa NWR,
Washington



Friends organization members are action-oriented people. They want to “do” something to make a difference on refuges. Some resist the idea of making plans, developing visions and evaluating progress. They worry that all that planning will take too much time. They know what they want to do and simply set out to make it happen. This type of approach may place the organization at risk of failure in the long run.

What Is Strategic Thinking and Why Is it Important?

In his 1993 work, *The Board Member’s Book*, Brian O’Connell wrote that: “In the absence of more realistic planning, most voluntary agencies are governed, and badly so, by the *bright idea*. A president, committee chairperson, board member, or staff member gets a bright idea about what should be done, and off the agency zags.” He further noted that the organization is almost defenseless against the bright idea “because it sounds so good or might help so many people.” But, as O’Connell emphasized, there is no mechanism to put it in competition with all the other things that might be done.

Many Friends/Refuge partnerships fall victim to the bright idea and miss opportunities that will help them create a sustainable collaboration and future. FWS Mentor and Executive Director of Rocky Mountain Nature Association, Curt Buchholtz, lists the “vision problem” as one of five burning issues affecting Friends/Refuge collaborations. He says the Friends and Refuge partners “have an indistinct view two to three years down the

road. This creates angst because they can’t see where they’re going together.” He notes that the “opportunities for Friends within the Refuge System are incredible” and groups need to work on positioning themselves to seize these opportunities. And while some bright ideas can indeed reinvigorate a stagnant group and recruit new members, they should be carefully weighed and measured against the long-term vision.

Strategic thinking allows preparation to seize opportunities. It is a continual process of considering where the collaboration is today, where the partners want it to be, what is needed to get there and where the needed resources may be to make the necessary steps. Strategic thinking also helps a collaborative effort weather the storms (e.g., transitions in leadership and staff, losses in funding, community controversies), because a plan of action is in place *before* the storms hit—an important factor in sustainability.

Collaborators who think strategically follow these actions:

- They have a vision
- They plan for the future
- They ask questions and evaluate progress



Strategic Thinking Starts with a Vision

Many specialists in the field of partnerships and collaboration have observed that vision is a clear picture of what can be. It creates the focus of what a collaboration can accomplish. Vision is what motivates and requires the partners to act.

Creating a vision for the Friends and Refuge collaboration is a key element to setting the stage for the future. The vision guides decision making and evaluation, and it creates the boundaries for the relationship. The questions are: How do you create that vision? And How do you know you have the right vision?

The Right Vision

Burt Nanus observed in his 1992 book, *Visionary Leadership*, that:

“The vision’s power lies in its ability to grab the attention of those both inside and outside the organization and to focus that attention on a common dream—a sense of direction that both makes sense and provides direction.”

Nanus pointed out that the right vision transcends the status quo and provides the all-important link between what is now taking place and what the organization aspires to build in the future.

Nanus says that powerful and transforming visions have special properties, including:

- They are appropriate for the organization and for the times.

A strategic thinking board asks questions and looks at ramifications...It wants to understand why each issue matters and how each decision will reflect on the organization. Such a board frames every decision against the organization’s mission, vision and values. Further, and equally important, it sees planning as part and parcel of every action the organization takes rather than as a discrete activity.

Terrie Temkin, “Nonprofit Boards and Governance Review,” (2003)

- They set standards of excellence and reflect high ideals.
- They clarify purpose and direction.
- They inspire enthusiasm and encourage commitment.
- They are well articulated and easily understood.
- They reflect the uniqueness of the organization, its distinctive competence, what it stands for, and what it is able to achieve.
- They are ambitious.

He continues with: “Visions that have these properties challenge and inspire people in the organization and help align their energies in a common direction. They prevent people being overwhelmed by immediate problems because they help distinguish what is truly important from what is merely interesting.”



What visions are *not* (from Nanus):

- Prophecies—They state a desired future, but do not predict that future.
- Missions—A mission states the organization’s purpose, not its direction.
- Factual—Visions deal with “possible and desirable futures” and may “never be realized as originally imagined.”
- True or false.
- Static—Vision development is a dynamic and ongoing process.
- Constraints on action—Unless the action is inconsistent with the vision.

Here are some warning signs that suggest a new vision is needed (from Nanus):

- Confusion about purpose—disagreements about priorities, directions.
- Complaints, pessimism, cynicism—people feel a lack of challenge or say they are not having fun anymore.
- The organization is losing legitimacy or reputation.
- The organization seems out-of-tune with trends.
- Signs of decline in pride with the organization.
- Excessive avoidance of risk, resistance to change, unwillingness to accept ownership or responsibility for projects.
- Absences of a shared sense of progress or momentum.
- A hyperactive rumor mill or lack of trust.

NWRS Friends Mentors have visited a number of refuges where partners felt stuck and exhibited many of the aforementioned signs, suggesting the need for a new vision. It is also not uncommon for Friends/Refuge partners to have unstated visions—indeed, in these cases, individuals in the partnership may have several *different* visions that sometimes conflict. Partners may ultimately end up working at cross purposes because they failed to use a strategic process to define a clear vision.

Creating a sustainable Friends/Refuge collaboration requires that partners define a mutually accepted vision. Friends/Refuge partners can use the guidelines provided to determine if they have described the best vision for their collaboration. As part of an annual planning process, partners revisit the vision to ensure that it is still timely. If not, it’s time to return to the visioning process.



Create the Vision Statement

The Alliance for Nonprofit Management (2003–2004) suggests that creating a vision statement is much like creating a strategic plan. It begins with brainstorming ideas but “relies heavily on intuition and dreaming.” They offer an important distinction on how a vision differs from a mission: A vision is a *guiding image of success formed in terms of a contribution to society*. The mission statement answers the questions: Why does our organization exist? What business are we in? What values will guide us?

In brief, a vision is more encompassing, and answers the question, “What will success look like?”

Below is a simplified process much like the Decision Making Process Steps used by NWRs Friends Mentors (see Appendix C). A group may frame the process by asking the following questions:

- How do you want your community to be different?
- What role do you want your organization to play in your community?
- What will success look like?

In brief, a vision is more encompassing, and answers the question, “What will success look like?”

The Alliance for Nonprofit Management suggests a step where each group decides on a metaphor for the collaboration and draws a picture of success (e.g., a mariachi band, a train pulling important cargo). “The value of metaphors is that people get to stretch their minds and experiment with different ways of thinking about what success means to them.”

Once the vision is developed and approved, the partners write it down and use it to guide future discussions and actions. The collaborative vision should become central to everything the Friends/Refuge partners do together.

Having a clear vision is a key element to thinking strategically. Going through the process of creating a vision can seem arduous to some, but it provides the solid foundation needed to create a sustainable future.

Vision, Leadership and Mutual Respect = Success

The Manager's Story

Refuge Manager Charlie Stenvall is proud of what the Friends/Refuge collaboration has achieved at Willapa NWR and has personally seen significant benefits accrue as a result. He says, “The dynamics have changed tremendously in the community since the Friends partnered with us. Before the partnership, tensions existed and support from the community was limited. Now, attitudes have turned around and the community provides incredible support to the refuge.”

Charlie Stenvall has built a relationship with the Friends based on trust, respect, well-defined boundaries and expectations, vision and leadership. He says that there are many variables that affect a Friends/Refuge collaboration. To create a successful Friends/Refuge partnership, he believes managers are faced with some important challenges.

Feeling Comfortable with Board Members as They Are

Boards need to change continually, grow and bring in new members. When things are going well, it's difficult to encourage change; but diversity is critical and being dynamic is a function of the board. As new members come on a board, they bring new ideas and interests to the group. Some managers worry about how these ideas could change the focus of a Friends organization. Stenvall says that managers need to feel comfortable with board members just as they are and also give them space to change. He notes that what brings strength and stability to the partnership, despite changing members, is vision—everyone needs to have the same purpose.

Understanding the Difference Between Providing Leadership and Providing Oversight

A key role of refuge managers is to provide vision and leadership to the collaboration. Some managers provide too much oversight, which is unhealthy for the relationship because then the success of the collaboration is dependent primarily on the manager. This puts the Friends at risk of failure if the manager should move or retire. Friends may also resent a manager that micromanages. However, what Stenvall finds more commonly occurs is that Friends/Refuge collaborations

WILLAPA AT A GLANCE

The Refuge

- Located along the southwest coast of Washington
- Established in 1937 to protect migrating and wintering populations of brant, waterfowl, shorebirds, and other migratory birds.
- Includes over 15,000 acres of tidelands, temperate rainforest, ocean beaches, small streams and several rare remnants of old growth coastal cedar forest.
- Preserves habitat for spawning wild salmon, hundreds of thousands of migrating shorebirds, and threatened and endangered species, such as the marbled murrelet.

The Friends

Established: 2000
 Membership: 350
 Annual Budget/Expenses: \$5–10,000
 Visit <www.friendsofwillaparefuge.org>

Mission

To provide assistance to Refuge programs and to enhance awareness and appreciation of the Willapa NWR.

Accomplishments

- 4th and 8th grade environmental education programs
- Scholarship program for high school seniors
- Staffing of Refuge's chum salmon interpretive trail on weekends in spawning season
- Volunteering on refuge projects
- Advocating for continued Federal funding for the Spartina Eradication Program.

flounder because the manager is not providing enough vision or leadership. Managers need to recognize their importance in the success of the collaboration and should work with Friends members to develop their organization's strengths while meeting the needs of the refuge.

Realizing that All Friends Efforts Are Refuge Efforts

Stenvall says it's essential to realize that everything must be blended—all Friends' efforts are Refuge efforts. This is very time consuming for a manager, but his perspective is that the Friends are volunteers and you must always value their contribution of time. *"It should never appear that a Friends group failed.* If you work together collaboratively, you can't place blame on one partner or the other, because responsibility for successes—and failures—is shared."

Building Trust and Striving for Group Independence

"I don't have any secrets from my Friends. We have frank discussions and I don't hold anything back." reports Stenvall. As the group became established, he took a very active role and met weekly with board members. With time, they've developed a high level of trust and the board has become so active that he has been able to step back.

The Willapa NWR Friends/Refuge partnership has matured and is now prepared to seize opportunities that were only dreams a few short years ago. For example, Stenvall hopes to begin changing attitudes and building a positive community perspective around another refuge in the complex. He knows a Friends partnership is the best way to accomplish this goal and plans to ask the board to consider establishing a new Friends group at the Julia Butler Hanson NWR. He also wants to capture the interests and passions of today's youth, so they will become the refuge's protectors and supporters of the future. He will ask the Friends to start a youth summer camp. This is a project that will take "lots of time to build, but will have a huge impact on the kids and the future of the refuge."

Stenvall notes that establishing a Friends partnership isn't always "the" answer. If managers have a need to fill, they need to look at all of the options available for fulfilling that need. The answer may be a Friends group, but building a successful and sustainable collaboration takes a lot of manager time. The commitment normally decreases as the partnership develops, but it can still place significant demands on a manager's time. Spend a few minutes with Charlie Stenvall and you'll have no doubt that the time he feels he has invested in his Friends organization has been richly rewarding.

The Friends Story

A common misconception by many Friends/Refuge partners is that a visitor center is necessary in order to reach the public. The lack of a center has been used as an excuse for being "stuck," or being unable to accomplish goals. In other cases partners have pursued building a center with some notable successes, but the process for achieving the progress has been fraught with difficulties and drained the energies and talents of Friends volunteers and Refuge staff alike.

Beverly Arnoldy, President of Friends of Willapa NWR, says, "We have no visitor center. We'll probably never have a bookstore, and it's not important now to have one here, either." This Friends/Refuge partnership understands that their small, tourist community (population 21,500) could probably not support a bookstore or visitor center. Yet these partners have made tremendous progress reaching the public and building the Friends organization in ways suited to their small community.

"We are entrenched with the community. Our partnerships are key."

Beverly Arnoldy, President, Friends of Willapa NWR

Friends President Arnoldy explains their success by saying that they have deep roots in the community and that their partnerships are key. From their environmental education programs to work projects and advocacy, it seems everything this Friends/Refuge collaboration does makes a connection to the community and engages partners. >>

The Friends' first priority has been environmental education (EE). Refuge Manager, Charlie Stenvall notes, "When we started the Friends, we made a strategic decision to build an EE program. The Refuge didn't have a strong focus and we felt the community could rally around this —like 'mom and apple pie.'"

The Friends second priority has been advocacy, particularly regarding spartina control (see sidebar story). Their work in this area has helped create strong partnerships that bring both funds and talent to the organization.

Arnoldy says their EE programs "cut across all levels of the community." An eighth grade program teaches students about wetlands. The Friends offers \$500 scholarships to graduating high school seniors who are pursuing degrees in natural sciences. They also sponsor an adult awareness program.

The longest running EE program, involving fourth graders, is now in its sixth year. The fourth graders spend the school year learning about the refuge and end the year with a field trip to the refuge. Half the volunteer teachers are high school juniors and seniors who earn community service credit. Oyster growers staff one of the seven science stations set up during the field trip. This EE program makes connections between many different people and age groups in the community. Arnoldy says, "I find it so gratifying; we have this cycle (of connecting people) that is amazing."

Beyond their EE programs, Friends design activities to tap into local interests. Arnoldy notes that people move there to get away from the big cities and there are many who have a love of the outdoors. The Friends engage these people by offering a wide range of programs and activities that meet their interests, from wintertime lectures to hikes and barbecues. The Friends sponsor work projects that

get people outside, such as trail or butterfly garden maintenance. She notes, "The Friends provides a venue for people to take advantage of their skills and match those with what is needed on the refuge."

Just as Charlie Stenvall seizes his leadership role with the Friends and strives for trust and mutual respect, Beverly Arnoldy and the Friends' board understand his position and respect "I may be President, but I view Charlie Stenvall (the refuge manager) as CEO of the Board — I always use Charlie for guidance." She concludes with, "I really respect Charlie and I know he respects me too. I think it's the best working relationship I've ever had." □



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Pelicans at Willapa Bay NWR

Spartina Eradication Kills Invasive Plant and Nurtures Community Ties

In addition to their environmental education programs, the Willapa Friends/FWS collaboration has received national recognition for their efforts to eradicate the non-native species, spartina, from the refuge. The Friends have received grants and successfully advocated for federal funding for the six-year eradication program. Along the way, they have made strong connections in the community and established solid partnerships. These connections and partnerships will help sustain the Friends/FWS collaboration for a long time.

Spartina alterniflora (commonly called smooth cordgrass) is a salt-water marsh grass native to the east coast; on the Pacific Coast, it is a non-native, invasive species. The grass was probably introduced to the area about 100 years ago. The oyster industry had farmed native oysters out of existence and used east coast oysters to replenish the system. It is believed that spartina came in the packing materials used to transport the oysters. Over the last 20 years, small clumps of spartina began turning into meadows; this changed the pH of Willapa Bay and destroyed the salt marsh habitat on which wildlife depended. The oyster industry was also seriously affected since spartina destroys oyster-growing habitat.

For a number of years, the refuge tried unsuccessfully to eradicate spartina using a variety of techniques, such as mowing and roto-tilling. The tide figuratively turned in 2002, when the Friends applied for and received a \$60,000 grant from the National Fish and Wildlife Foundation to treat an experimental test plot with herbicides. The grant paid for purchasing herbicide to spray 600 acres of wetland that had become a spartina meadow. The FWS selected a GPS-controlled, computer-assisted precision sprayer on an amphibious tractor to selectively spray the spartina, a method that proved to be more successful than any other.

This success led to a six-year collaborative project (through 2008), envisioned by Manager Charlie Stenvall, to eradicate spartina on the refuge. Major partners include the oyster growers and state agencies that contribute funds and support to the project. Congress has appropriated about \$1.5 million for the project every year since 2003. Friends visited their senators' and congressmen's offices in Washington, DC and met with members of the Appropriations Committee and Office of Management and Budget (OMB) in 2003, 2004, and 2005 to explain the benefits and success of the spartina project to date. Through the support of the Friends and 15 other organizations, the collective efforts have been instrumental in ensuring the funds were appropriated.

The spartina project has been important to the FWS/Friends collaborators on a number of levels—they have built goodwill in the community, particularly with oyster growers. They have gained national visibility, and established ties with private and public organizations at local and state levels.

Especially in this small community, partnerships have been the key to sustaining the Friends organization. For example, the oyster growers have been affiliated with the Friends since its inception and many are long-term members of the organization. These people volunteer to assist with educational programs and will continue to contribute valuable resources to the organization in the future. The efforts of the Friends have made the refuge a “good neighbor.”

Partnerships have brought strength to the Willapa NWR Friends/FWS collaboration. The community has directly benefited from its success and will work to ensure that its future continues to be a bright one.

The Friends have a wonderful website. For more on this story and the Friends see: <www.friendsofwillaparefuge.org> □



Strategic Thinkers Plan for the Future

Plans provide a map to the future. They keep everyone on track and prevent “management by the bright idea.” Time spent planning is time well spent and actually makes it possible to accomplish objectives more quickly. A well thought out plan will consider necessary resources and specify actions, timelines and responsibilities that clarify where the partnership is headed as well as the responsibilities of each partner. Without a plan, partners could get stuck in a crisis mode—responding to emergencies and deadlines. They might be doing more but not necessarily doing better.

Plans do not need to be complicated, but they do need to reflect the needs and abilities of the Friends/Refuge collaborators. Initially new Friends/Refuge partners may begin with a six month or one year plan. As the collaboration develops, plans will become more strategic and longer term. Plans should be realistic, but they also need to be forward thinking—strategic thinking collaborators will want to be prepared to seize new opportunities as they arise.

Create a Plan

Some Friends/Refuge partners set aside a day to work on their plans. Others set aside a few meetings that focus strictly on plan development. NWRS Friends Mentors recommend a whole day retreat instead of trying to plan during regular meeting times. Whole-day planning retreats can be difficult to arrange, but this highly effective approach provides an excellent tool for building cooperation and camaraderie between participants.

The *Decision-Making Process Steps* (Appendix C) describe one of many methods or tools partners can use. Although facilitators aren’t necessary, they can help the process tremendously by encouraging everyone in the group to participate fully.

Regardless of the approach that is selected, effective planning for a sustainable and strategic Friends/Refuge collaboration requires the following:

Plan together

Creating a plan is a collaborative process that includes Refuge managers and staff as well as the Friends Board.

Reach toward the collaboration’s vision

The vision and each partner’s mission provide the foundation for the plan.

Take refuge strategic plans into consideration

Many Refuges have completed their Comprehensive Conservation Plans (CCP) which can be used to identify a clear role for the Friends organization and guide the collaboration’s efforts.



Be realistic

It's tempting to create a wish list of things the Friends/Refuge collaboration would like to do and hope to accomplish "someday." When it comes to acting, be sure to choose only concrete ideas that you know you can accomplish. As you build a strong foundation in a systematic way, you will find it easier to realize some of your bigger, more complex dreams.

Plan for the Friends organization

Many Friends/Refuge collaborators forget to create a development plan for sustaining the Friends organization itself. If resources are exhausted on refuge projects, things like membership and leadership development, fundraising and other organizational development activities will be left unattended. This can unintentionally set up the Friends organization and the collaboration for failure.

Plan for transitions and opportunities

Change is inevitable. Managers and staff retire or move away, Board terms expire, people age and life priorities change. Communities, FWS and government priorities change. Consequently members of the collaboration must consider the inevitability of change in their plans (e.g., How will new leaders be identified and cultured? What happens when a new manager comes on board?). Strategic thinkers also develop plans that position themselves to seize opportunities that will arise (e.g., How will we purchase that house or that land when it comes up for sale?).

Review and update your plans annually

An annual review provides an opportunity to reflect, celebrate and plan adjustments for the next year.

Tips for a good action plan include:

- Sets goals and benchmarks
- Identifies partner roles
- Decides how to approach the issue or opportunity
- Establishes time lines
- Determines resources needed — not just what is in place
- Decides what type of evaluation is needed
- Documents agreement with partners (from Hogue, 2006)

Use the Plan

As Terrie Temkin noted (2003), plans are not "expensive dust catchers." She added that what really destroys the effectiveness of strategic plans is when boards fail to use the plans as the guides they are meant to be. Thus, it is recommended that partners should be referencing their plans at every meeting, using them to frame programmatic, human resource and financial decisions

Others have observed that the outcome of the planning retreat might be an annual agenda that can be posted at each meeting (e.g., on large poster board). The annual agenda can provide a valuable reference to evaluate progress and accomplishments during the year. It also helps everyone stay on track. It also makes it easier to say "no" to the distracting ideas that inevitably will surface along the way.



Regardless of the system used, Friends/Refuge collaborators must use their plans as living guides for their activities. Plans direct the collaboration's action. They must be reviewed and evaluated at each meeting. They instruct committees and become part of committee reports. They define responsibilities and hold everyone accountable. Well thought out and well implemented plans provide a basis for nurturing the relationship: *trust and respect grow as each accomplishment is celebrated.*

Strategic Thinkers Ask Questions and Evaluate Progress

Always questioning is an element of strategic leadership. Where have we been? Where are we going? Have we accomplished what we said we would? Terrie Temkin (2003) writes:

“Organizations search out the best and the brightest to sit on their boards. However, all too many of the organizations then ask these talented individuals to do little more than listen to a series of reports. Questions—the underpinnings of strategic thinking—are often discouraged either because they lengthen the meeting or challenge the leadership. This type of behavior must change. We need to encourage not discourage questions.”

What kind of questions do strategic Friends/Refuge partners ask? Here are some ideas:

- Are we going where we planned?
- Are we meeting our expectations?
- Do we need to make any changes or additions?
- Is this helping us accomplish our mission and goals, and reach our vision?
- Are we ready to do this given the stage of our collaboration and resources available?
- How well are we working together?
- Are there changes or opportunities ahead for which we need to prepare?

Strategic thinkers focus on these kinds of questions at every meeting. This helps to create a culture whereby partners continually measure progress against plans, make course corrections and look to the future for new opportunities. This environment of questioning and evaluating helps to nurture the relationship because progress and accomplishments are more immediately apparent to everyone and create opportunities for regular celebration. □



Managing Transitions and Life Cycles Strategically

The Friends/Refuge collaboration at Tualatin River NWR is experiencing a new beginning. After 14 years of acquiring and restoring land, on June 3, 2006, the refuge opened to the public for the first time. In one month, they had already recorded 7,000 visitors.

Ralph Webber, Refuge Manager, and Norm Penner, Friends President, are excited about the future. While opening the refuge brings new challenges (such as how to balance the Refuge System's "Wildlife First" mandate with visitor needs), it also brings new opportunities. When the refuge was closed to the public, the Friends struggled to remain visible and engage the public. With the refuge open, the range of possibilities has broadened tremendously.

This Friends/Refuge partnership had been readying for this transition for a long time and was prepared to meet the new challenges. For years these partners had used a strategic process to manage their future—the Friends wrote their first strategic plan in 1998, which was closely tied to Refuge management plans.

Using a strategic process gave them stability and a sense of direction during periods of growth and change. The plan is an essential element in making the partnership work. According to Friends President Norm Penner and Manager Ralph Webber, along the way, the partners learned some valuable lessons.

It is not enough to have a strategic plan—an implementation strategy is also essential

Once the strategic plan was developed, the Friends board realized they also needed to *think strategically* about realizing the elements of the plan. They identified two big issues to address: *who* would be responsible for various parts of the plan and *where* would the resources come from to support these activities? The partners then prioritized—deciding which aspects of the plan could be achieved first, determining what was needed for resources and who would do the work. To keep on track, they review the strategic plan periodically, check off what's been done and decide what they want to do next. Penner says, "We don't leave it alone, we keep checking in." Finally, the plans need to be updated—the Friends first plan was written in 1998; a new three-year plan was developed in 2005.

TUALATIN RIVER AT A GLANCE

The Refuge

- Established in 1992 after a local citizen donated 12 acres of land to the FWS. Its purpose is to protect, manage, and restore floodplain habitats of the Tualatin River watershed for the benefit of migratory birds and other wildlife, and for the enjoyment of people.
- Located near Sherwood, Oregon (population ~15,000) about 17 miles southwest of Portland within the floodplain of the Tualatin River basin. 1,358 acres (acquired as of October 2005); 3,060 acres (approved boundary)
- When flooded Tualatin River floodplain wetlands support thousands of ducks, arctic nesting Canada geese, tundra swans, and a variety of other water birds. The Refuge is an important breeding area for neo-tropical migratory birds as well.
- Visit <www.fws.gov/tualatinriver>

The Friends

Established: 1992
 Membership: 338
 Annual Budget/Expenses: \$30,000–40,000
 Visit <www.friendsoftualatinrefuge.org>

Mission

Protection and restoration of the refuge for the benefit of fish and wildlife and for public education and recreation.

Accomplishments

- Restoration of over 850 acres of farmed floodplain, including seasonal and forested wetlands, wet meadow prairie, riparian forest, and oak savanna habitats.
- Convincing our Congressional delegation that their constituents wanted a visitor's center, opened in 2008.
- Created public awareness of and appreciation for the Refuge.

The Friends strategic plans must tie to the Refuge's plans

Because local citizens started the refuge, they have a strong sense of ownership. This proprietary sense could easily have interfered with the partnership if the goals of the Refuge and Friends didn't agree. To prevent that from happening, the Friends and Refuge at Tualatin River NWR agreed on a vision for the collaboration that is reflected in their strategic plans. This vision and the plans set boundaries for the relationship, making it possible to build mutual trust and respect between the Friends group and the Refuge.

Improving Board management and structure can transform the organization

The board recently moved to a committee structure, which has transformed the way they manage the organization. Before they had committees, the board would debate everything for hours. Once they implemented a committee structure, they realized they could refer much of the work to the committees. Change sometimes occurs slowly and it was hard for board members to let go of debating everything. To facilitate the meeting process, Penner developed an agenda that included time frames for discussion. He added a half-hour pre-meeting social time and instituted a definite meeting start and end time within which they would stick to business. This change has made a difference in meeting efficiency. As President, he sees his role as a facilitator to help people move on once a decision is made. Penner reports that this simple change greatly improved the group's decision-making and organizational management and says as a result, "The Friends are really taking off."



JANE PELLICCIOTTO

Tualatin River NWR Visitor Center and information kiosks

“Don't ever give up. Most times you can work through the problems. It takes time to build. You start out strong and then reach a plateau and it can take several years before taking off again.”

Ralph Webber, Refuge Manager, Tualatin NWR

Giving up control isn't easy, but is necessary to keep people engaged

Until recently, board members would try to do everything, then burn out and quit. They could attract people to the organization, but found it difficult to keep people involved. They realized part of the problem was that board members were reluctant to give up power and delegate to others. They also didn't like asking for help and felt like they were "begging." Friends President Penner states that they are changing their thinking and their habits. Asking people to become involved is not begging; rather, it gives people an opportunity to contribute. Board members have learned to relinquish some of their work, which has given them time to lead committees and engage members in the business of the Friends.

Webber and Penner report that transitions are a positive thing. Bringing in new people (staff and board members) with a variety of ideas has helped move the collaboration forward a great deal. When asked what messages he would like to send to other Friends/Refuge collaborators, Manager Webber's advice was:

"It is important to build a bridge as a liaison with the Friends and attend every meeting. Before we attend a Board meeting and as we develop refuge work plans, we get input from the staff and then bring this information to the Friends. We have staff engaged in committee work—you've got to engage staff with the Friends. I've seen situations where staff aren't supportive and don't want to work with the Friends—that's a death to both the Friends and the Refuge. Friends are an extension of the staff. We're happy to see changes in the Friends membership because we can only do so much with six permanent employees. With volunteers, we're essentially getting the equivalent of another one and one half full time employees and we'll be seeing more as a result of the Friends growth."

Webber also advises, "Don't ever give up. Most times you can work through the problems. It takes time to build. You start out strong and then reach a plateau and it can take several years before taking off again."

From the Friends' perspective, Penner advises that it's extremely important for Friends to focus on membership—especially in a place like Portland, where there is considerable competition for volunteers. He says, "The Friends of Tualatin River NWR had an identity problem—folks didn't know about us. We embarked on a publicity campaign and it took about a year to get our name in the press on a regular basis. But by the time we opened the refuge, we had the support of twelve major businesses, five local city governments and numerous small businesses and service organizations to support the opening event. We couldn't have done this without the publicity." Focusing on membership has brought big returns for the Friends—they signed 193 new members (more than doubling their numbers) at the opening event!

The Friends/Refuge collaboration at Tualatin River NWR nicely illustrates how strategic thinking can propel the relationship ahead, even while living through the inevitable life cycles that affect all organizations and partnerships. □