

Soaring

to New Heights

*A Guide to Creating a Sustainable
Friends/Refuge Collaboration*



*“I can’t imagine
managing a
refuge without a
Friends group.
It’s the best thing
we’ve ever done.”*

Dave Hilley, Manager, Quivira NWR, Kansas



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Friends & National Wildlife Refuges

*The Value of
Collaboration*



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Prairie dogs at
Wichita NWR, Kansas



In every state, caring people have formed nonprofit Friends organizations that are dedicated to supporting the mission and work of National Wildlife Refuges. Wildlife refuges are an asset to the communities that surround them. The hard work of Friends allows refuges to thrive and continue to provide resources, information and events to the public. The ideas and inspiration in this handbook will take your organization to new heights of success.

The National Friends Partnership

In 1996 the U.S. Fish and Wildlife Service (FWS), National Wildlife Refuge Association (NWRA), National Fish and Wildlife Foundation (NFWF) and National Audubon Society (NAS) initiated an ambitious national partnership designed to facilitate the growth and effectiveness of Friends organizations with National Wildlife Refuges across the country (Friends/Refuge collaborations). Together the national partners developed an array of programs that have included national conferences and regional workshops, training, publications, grants, internet support and a mentoring program. On the local level, Friends organizations and Refuge staff have also been supporting each other and sharing vital information for creating sustainable collaborations.

These efforts, supported by the enactment of the National Wildlife Refuge System Improvement Act of 1997, led to a tremendous growth in the number of Friends organizations across the country. In 1996 there were about 50 organizations. Today more than 230 organizations exist—a more than 350 percent increase.

The average membership per organization is approximately 260 members, totaling about 65,000 citizens who are dedicated to supporting the mission of our National Wildlife Refuge System. To fully appreciate the significance of this support, you must look beyond the quantifiable results, such as funds raised and volunteer time donated, and appreciate the less tangible outcomes, such as changes in local culture and attitudes toward our National Wildlife Refuges. Indeed, successful Friends/Refuge collaborations have resulted in a wide range of benefits:

- Positive relationships with local communities
- Increased awareness of Refuges at the local level
- A better informed public
- Increased visibility, support and understanding of Refuges as part of a national system
- Increased funds and volunteers to help achieve Refuge management goals
- Positive relationships with legislators
- Ability to plan for and seek out new opportunities that weren't possible before the collaboration



Assisting Collaborators to Solidify Their Partnerships

You can see the benefits are tremendous, thus a widespread incentive to establish Friends/Refuge collaborations at as many National Wildlife Refuges as possible. Yet creating a solid, sustainable collaboration is a complex process that takes time, commitment, skill, patience, flexibility and enthusiasm from everyone involved. Although Friends/Refuge partners report many achievements, there can be many potential stumbling blocks. Partners may still have questions about how to manage the difficulties inherent in collaboration and still accomplish their objectives.

This handbook offers guidance on creating a successful and sustainable Friends/Refuge collaboration. It is based on the collective experience of successful Friends/Refuge partners across the nation and on the wide range of literature available about nonprofit organizations and collaborations. It recognizes that it may be challenging to enter into such a partnership. Indeed, as recognized collaboration expert Karen Ray (2002) writes, “[F]or many of us, the collaboration process is a pain in the neck. Collaboration can mean frequent, irritating meetings, arduous task completion and snail-paced decisions.”

The goal of this handbook is to help partners solidify their partnerships and manage the bumps along the way. Experts in Refuge Friends and Refuge partnerships agree that focusing on a handful of areas can ensure the success of the collaboration. The following chapters detail these keys to success.

“Even when it’s not perfect, the benefits are so incredible, it’s amazing!”

Kathy Woodward, NWRS Friends Mentor, Friends of Great Swamp NWR

The Friends Organization Mentoring Program

In 1997 the Service established a National Wildlife Refuge System Friends Organization Mentoring Program. This program is staffed by Friends members and Refuge Managers who voluntarily share their expertise with people involved with Friends/Refuge collaborations at refuges around the country. Through this program, mentors offer guidance and assistance as Friends/Refuge partners form collaborations or deal with transitions or challenges.

These experts have visited close to 100 refuges and communities around the country. The areas visited have been diverse (rural, suburban and metropolitan, poor, affluent and retirement communities), as have been the needs presented by the local Friends/Refuge partners.

NWRS Friends Mentors have recognized that there is *no* model Friends organization and the definition of success at any one refuge will depend on local needs. Trying to make a Friends organization and a Friends/Refuge collaboration fit a perceived model is a mistake that can lead to unrealistic expectations



and disappointment. Every situation is different, and effective partnerships need to reflect local needs and interests. Success must be measured against local visions and plans, not in comparison with the outcomes of other Friends/Refuge collaborations around the country.

Mentors report there *is* a model for crafting a sustainable Friends/Refuge collaboration, one that weathers the storms, adapts with changing needs and sustains itself over time. This model includes five key elements that are common to all successful Friends/Refuge collaborations.

Key Elements to a Successful Collaboration

1 A Solid Collaboration

Hallmark features of a solid Friends/Refuge collaboration include:

- Communicate, communicate, communication, with communications systems in place.
- The manager provides leadership and takes a personal interest in the Friends organization and its members. While day-to-day activities may be delegated to staff, the manager attends most Friends meetings and events, and is readily available to the Friends leaders.
- The Friends leaders, Refuge Manager and Refuge staff create a culture that provides an opportunity for everyone to get to know each other on a personal level.
- The Friends/Refuge partners trust each other. Everyone feels honored, valued and respected. Partners recognize this type of relationship doesn't happen overnight, and they work hard to build trust and respect.
- Expectations created together are clear and realistic.
- Everyone in the relationship (manager, all the staff, the Board and committee members) takes responsibility for making the collaboration succeed.
- Roles and responsibilities of the partners are clear and respected.

THE MENTORING PROGRAM

Sponsors The U. S. Fish and Wildlife Service, National Wildlife Refuge System, Division of Visitor Services and Communications through the National Friends Coordinator.

Established 1997

Purpose To help Friends Organizations flourish

Program Model The Mentoring Program is a form of advanced education and information sharing between the Mentoring Team, the Refuge Staff, and the respective citizen members of a forming Friends organization or Friends organization needing assistance. Mentoring visits are designed to help form new Friends collaborations, and nurture and advise the groups beyond their earliest stage of forming.

Visits Completed 96

Mentors

- Experts in Friends/Refuge collaborations
- Friends leaders and Refuge Managers
- Receive regular training



② Strategic Thinking

The partners have jointly defined a vision for what they want to achieve. For meeting that vision, they are guided by a plan that is regularly evaluated and updated as needs change. In addition, partners regularly consider the future: they position themselves to seize opportunities as they arise and plan for the inevitable transitions that occur over time.

③ A Well-Managed Organization

Well managed Friends organizations use good business practices, nurture leadership skills, hold efficient meetings and use a committee structure. An effective Friends organization is critical to the long-term success of the collaboration. Funds, volunteers and members come to organizations that demonstrate they are a good investment. Sound business and non-profit management practices ensure a solid organizational future.

④ Understand FWS Systems & Nonprofit Management

To effectively collaborate, Friends and Refuge partners must be knowledgeable about each other. Friends must learn about Refuge systems, and the Refuge Manager and Refuge staff must understand nonprofit governance. Partners do not need to become experts in each other's realm of work, but they should educate each other in order to build mutual respect and understanding.

⑤ Celebrate and Evaluate

The importance of celebrating cannot be underestimated. Celebrations provide opportunities to build personal relationships while recognizing personal and professional achievements. Successful collaborators consciously integrate celebrations into their strategic plans. The partners discuss anticipated accomplishments, allowing them to be well defined *before* they happen. Acknowledgements readily flow between partners, with each recognizing the contributions of the other. Rewards are given that are personally meaningful. And partners celebrate the collaboration itself, as well as its achievements.

The following chapters discuss each of these five keys to a successful Friends/Refuge collaboration in detail. □



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Key Element **1**

*A Solid
Collaboration*



Flickr / JSLATER318

Quivira NWR, Kansas



There are many reasons for Refuge Friends organizations and the Refuge to enter into a collaboration or partnership. Often, a primary reason is to build a strong, positive bond between the Refuge and community. Collaboration is required because relationship building cannot be accomplished alone. Other reasons for partnering include raising the visibility of and advocating for Refuges, establishing and expanding broad education and outreach and programs, fundraising and resource development.

Regardless of the reasons for entering into a partnership, building a solid collaboration takes time and requires a mutual effort by the Friends members, Refuge Manager(s) and Refuge staff. According to mentors, success may elude partners because they fail to identify and take the important steps required to build a solid collaboration. On this subject Friends Mentor Molly Krival, “Ding” Darling Wildlife Society, writes:

Once the initial enthusiasm of formation dissipates, board members and refuge staff have only a vague idea of how to work together. Frequently, Friends do not know how to collaborate for each project. Or staff do not realize they have to collaborate on Friends projects in order to ensure they fall within refuge and Service parameters. Managers may not understand the kind of collaboration they and their staff need to provide...

The reasons for collaboration are to achieve some result your organization cannot achieve alone, and to achieve that result in a complex environment.

Karen Ray (2002), from: *The Nimble Collaboration: Fine-Tuning Your Collaboration for Lasting Success*

In this section we’ll examine four key elements Friends/Refuge must work on to ensure a solid collaboration:

- A positive, well-defined *relationship*
- *Trust* between the partners
- A mutually defined *vision*
- *Shared power*



Creating a Positive, Well-Defined Relationship

According to collaboration expert Karen Ray, much of the frustration people endure at the start of a collaboration involves defining relationships among members. The more each entity knows about this relationship at the outset, the easier it is to nurture a collaboration that rewards all the members.

Over the past decade, the Fish and Wildlife Service and Refuge System, National Wildlife Refuge Association, and National Fish and Wildlife Foundation have sponsored a wide array of programs and materials to assist Friends organizations and Refuge Managers and staff in establishing collaborations. They have produced books, created networking tools, offered workshops, conferences and training, provided grants and managed the Mentor Program in what has become a national model for Friends organization development. Each of these tools has proven critical to the growth and success of Friends/Refuge collaboration on refuges across the country.

Among these tools is the *Guiding Principles for the Friends/FWS Relationship* created by a group of Friends experts at a pivotal 1997 meeting held in Virginia Beach, Virginia (see Appendix A). The Guiding Principles form the basis for establishing the relationship — providing a foundation upon which Friends and Refuge partners can build their collaboration.

In *Collaboration: What Makes it Work, 2nd Ed*, authors Paul W. Mattessich, Marta Murray-Close, and Barbara R. Monsey (2004) describe 20 factors that influence the success of a collaboration. The Guiding Principles document closely matches many of the twenty factors identified by Mattessich, Close and Monsey (see table, p. 17).

Build a positive, trusting, respectful relationship at the outset to put your collaboration on solid footing. Relationship building takes time. A good relationship provides the solid foundation necessary for working well together, especially when difficult issues arise. To reach the goals of the Guiding Principles, Friends/Refuge partners should allow time to get to know each other well before venturing too far into collaborative efforts. Spend meeting time learning about each other, plan social time outside of regular meetings, schedule fun activities — all of these efforts will lay a foundation upon which trust and respect can develop, making it possible to create a shared vision and to share power in reaching toward the vision.

The value of personal relationships cannot be stressed enough. In a world of e-mail, portable communication devices and increasing technological advances, we must remain diligent and committed to face-to-face meetings. Without it, even the most worthy and successful collaborations are prone to challenges and even failure.

Working Together to Increase the Visibility of the Refuge

The Manager's Story

In 1997 the Friends of Quivira NWR was established. The group got its start during a mentoring session when manager David (“Dave”) Hilley asked the community to join him in creating a collaborative partnership. He saw a need to increase the visibility and community awareness of the Refuge and believed a Friends partnership was the best way to accomplish this.

Nine years later, Dave reports three key accomplishments that place this Refuge/Friends collaboration in the big leagues:

- The Friends have increased awareness of the Refuge. Indeed, the Friends have not only improved the image of the Refuge within the community, they have succeeded in building awareness statewide.
- Visitation has increased from about 50–60,000 a year a few years ago to nearly 100,000 today.
- The Friends have made a strong connection with the community. They sponsor an annual calendar of events that draws people from all over the area. They have been the proud winners of the community’s annual Octoberfest chili cook-off three years in a row. These and many other activities have built community relations, making the Friends and the Refuge valued neighbors.

Why has this partnership been so successful? Dave Hilley lists a number of factors.

The Manager's Role is Pivotal

When he visits other refuges under the mentoring program, Dave advises that the Friends partnership is the Manager’s job. Managers may delegate day-to-day coordination of partnership activities to a staff member, but it remains their responsibility to maintain the relationship by providing support, guidance and leadership. One way Hilley does this is by attending all meetings and events. He acknowledges that it’s not always possible for Managers to participate in every Friends function. However, by being present, a Manager sends a powerful message to the Friends that s/he is committed to the collaboration.

QUIVIRA AT A GLANCE

The Refuge

- Established in 1955 to provide wintering and migration stopover habitat for migratory birds along the Central Flyway of North America.
- 7,000 acres of wetlands with slight to moderate saline water.
- Thousands of Canada geese, ducks, and other migratory birds, such as sandhill cranes and shorebirds, use these wetlands as they pass through the Refuge on their annual migrations.
- Visit <www.fws.gov/quivira>

Community

Stafford County is located in south central Kansas and has a population of about 5,000 that reside in a 788 square mile area.

The Friends

Established: 1997
 Membership: 132
 Annual budget/expenses: \$5,000–10,000
 Visit <www.friendsofquivira.org>

Mission

To promote the refuge, support its mission, education and wide use by visitors.

Recent Accomplishments

- Annual events, especially monarch mania, and the October celebration
- Hosting two statewide eco-meets
- Supporting the Ramsar designation
- Fishing clinic and derby

A Clear, Shared Vision

A clear vision for the partnership is necessary, one that is realistic and responsive to the interests and needs of all the partners. Dave Hilley understood what he wanted from the Friends collaboration before he asked for help. He reports that he wasn't interested in having the group talk with public officials, raise money or be involved in a lot of Refuge projects. His personal vision was to increase awareness of the Refuge.

He understood that he could share his vision with the group, but that they had to agree, on their own that this was also their vision. He notes, "We discussed things for a long time." As a result, the partners agreed to take on the task of building Refuge awareness and decided to reach their vision by focusing on events.

Good Communication a Must

Good communication is critical in order to build trust, set expectations and establish boundaries. When asked how the partners have built trust and established boundaries, Hilley says, "The big thing is communication; it reduces the problems. There are no secrets with the Friends. The Friends President knows she can call us and we'll be perfectly straightforward with her." Communication goes both ways, with partners checking in with each other on rumors they hear in the community and discussing how everyone should respond. There have been times when Hilley needed to talk with the Friends President two or three times a day. Right now they chat at least weekly. He says that he's seen situations where managers never talk to the Friends group and it has proven to be a big mistake.

Because the partners regularly communicate, they can assure that everyone is on track—they learn about each other, reaffirm values, set expectations and build relationships. New board members know what's expected of them, and they are not accepted onto the board if they have a different agenda. Hilley reports that there was one instance where a board member had some trouble, but the group was strong enough to say, "your agenda isn't our agenda," and the board member withdrew. This would not have been so easy to do if communication was poor or expectations were unclear.

Fostering Relationships

Building personal relationships has big payoffs. The partners have invested great energy in building personal relationships—with each other and the community at large. They see relationship building as an important tool for achieving their vision. Hilley notes that while staff was initially worried at first about what the Friends were going to do, they supported the collaborative vision and spend lots of time working with the Friends on events. He says the staff sees the value of wildlife education and making the public aware of the Refuge's habitat and wildlife. "Without this awareness, we don't have support. If the Refuge were threatened, more people would support us now that we have the Friends than would have prior to their existence. And that's a secure statement from a manager."

Hilley almost jokingly shares that one of the most important tools they use to build relationships at Quivira NWR is food. "We always have food. People might not like to come to meetings, but if we have food, we have a great turn-out." Indeed, while the Refuge was being considered for designation as a Ramsar site (a wetland of international importance), the Friends financed and served 1,100 meals for meeting attendees.

Motivating the Team

Personal rewards and appreciation are important to sustaining the relationship. While tokens of appreciation are used, Dave Hilley thinks these are less important than a personal approach. He says, "We make a big effort to say thank you. I never send an e-mail to the Friends without saying 'Thank you for your effort.'" Every year, the staff takes the Friends on a spotlight tour, visiting places at night that most people don't get to see.

Appreciation goes both ways. The Friends make a big thing about recognizing staff when they put together their staff appreciation dinner. This mutual gratitude means there is an atmosphere of harmony in working together. Staff members go out of their way to work with the Friends because they appreciate them. >>

The Friends Story

If you heard about the successes and visibility of the Friends of Quivira NWR, you might think that this was a sizeable group with a long history in a large community. Up close, the story is quite different.

Stafford County is a small farming community in Kansas, with a population approaching 5,000 people spread across a 788 square mile area. In the 2006 Friends Organization Survey conducted by the FWS, the Friends reported a membership of 80 people and an annual budget of \$5,000 to \$10,000. They do not operate a sales outlet, although they are considering this option.

This is a small Friends organization located in a small farming community, yet the Friends of Quivira NWR reports big results since the organization was established in 1997:

- Increased awareness of the Refuge *statewide*.
- Purchased a tram to carry visitors around the Refuge.
- Increased annual Refuge visitation by 50,000.
- Developed a strong connection with the community.
- Held many highly successful events each year that draw people from around the state.

One reason the Friends of Quivira can report such success is that their primary objectives are simple and clear:

- Get people—primarily families—to the Refuge.
- Increase awareness of the Refuge in the state.

Friends of Quivira report successes that are appropriate to the Refuge and community, successes that fulfill a vision developed as a collaborative effort between the Friends and the Refuge. This partnership has found a formula that works well. The Friends report these keys to their success:

- Focusing on children and their families as a target audience.

- Deciding what they want to accomplish and finding a way to do it.
- Focusing on fun.
- Having a hard working board that puts the needs of Quivira NWR first.

The emphasis of this organization has not been fundraising, but education. Members have focused their attention on activities that draw people to the Refuge. Since its inception, the organization has sought to create enjoyable events that interest the community while educating them about the Refuge. Here's a recent sampling from their website:

Peeps & Pastry Morning Tour

Sign up for a Peeps & Pastry Morning Tour. See the Refuge in spring all abloom as only a Friends of Quivira member can!

Father's Day Out

Give Fathers some quality time with children in preparing for Mother's Day (and give Mom a morning off!).

Fishing Clinic

Work with Quivira staff to teach kids a love of fishing and how to do it safely.

Monarch Mania

Learn about flora and fauna of the plains while helping the Quivira staff tag monarch butterflies.

The Friends report that staying with “the tried and true” has been important to the group's success. However, as the organization matures, members are beginning to think more strategically about the future. They are concerned about programs and activities getting stale and worry about inevitable transitions in leadership, both within the group and on the Refuge. They recognize the need to nurture new leaders and are considering ways to engage more of their membership in the workings of the organization. A rural location and small population base have not been handicaps for this hard-working, ambitious group. □



Factors Influencing the Success of a Collaboration

A Selection From Mattessich, Murray-Close and Monsey (2004)

- Communication is open and frequent
- Unique purpose
- Mutual understanding, respect, trust
- Members share a stake in outcomes and process
- Collaboration is in the self-interest of members
- Established informal relationships
- Shared vision
- Members are flexible, adaptable, able to compromise
- Clear roles and policy guidelines
- Skilled leadership, adequate funds, materials, time

Guiding Principles for the Friends/FWS Relationship

Abbreviated version—see Appendix A for full text

Friends Role	FWS Role
<ul style="list-style-type: none"> ■ Use consistent, regular, honest communication. ■ To be independent advocates, work to protect the natural resource, assist in accomplishing refuge projects. ■ Respect and trust USFWS employees and have reasonable expectations. ■ Agree to always discuss differences of opinion. ■ Become educated and know the refuge mission ■ Fully commit to keeping up the partnership. To not undercut agency and refuge management. ■ To buy into a shared vision that both sides work to create. ■ To help the Service personnel to be and feel productive. ■ To understand and respect the operational pressures and boundaries that affect the Service. ■ To provide a positive community influence. Be the doorway to the public. 	<ul style="list-style-type: none"> ■ Use consistent, regular, honest communication. ■ Have a true sense of partnership with a “no surprises” philosophy and a full sharing of information. ■ Work to protect the natural resource and fulfill FWS mission as mandated by Congress. ■ To trust and respect the Friends. ■ Agree always to discuss differences of opinion. ■ To understand what it takes to have a Friends group. ■ View the Friends groups as a long-term, personal friendship. ■ Work to infuse support for Friends throughout the agency. ■ Help the Friends to be and feel productive. ■ Teach Friends about the government systems to make the job easier. ■ Provide consistent follow-through and active support (training, mentoring and providing the resources) of Friends groups from the Washington office, the regional offices, and the field.



Building Trust Between Partners

The Guiding Principles provide a conceptual template to apply to the realities of the Friends and Refuge cultures. By nature these cultures are very different: the FWS is a federal agency in the Executive Branch, subject to numerous laws and regulations, as well as Congressional oversight. Friends organizations, conversely, represent the grassroots approach and are governed by mission statements and bylaws developed by their members. Friends are not held to the same regulatory framework as Refuge staff. It takes time to build trust between these very different entities, but this a critical step in establishing a successful collaboration.

In a 2000 FWS survey, Friends members and Refuge Managers identified their fears about entering into a partnership:

About Friends, Managers wonder:

- Will they expect special privileges?
- Will they help us or add to our burden?

- Will they be patient with the system and what may appear to be bureaucratic hurdles?
- Will they work with us?
- Will they speak out against us?
- Will they represent the Refuge well in public?

About FWS, Friends members wondered:

- Do they understand our limitations?
- Will they work *with* us?
- Will they respect us?
- Will they keep us informed?
- Do they understand our rights as independent organizations?
- Do they understand our need to be productive and useful?

These fears are all related to issues of trust. One way to build trust is for members of the collaboration to reveal their self interests, which Karen Ray defines as “a code word for *passion*. Once a person’s passion is hooked, that person’s commitment is hooked.” Ray also notes that when self-interests are not revealed, people get secretive and look for hidden agendas:

When you talk about your organization’s self-interest, you are exposing what used to be its hidden agenda. You legitimize concerns and create an atmosphere that invites discussion about important issues. One of the first dramatic changes that people observe in healthy collaborations is, “We have no secrets.”

“Trust the Friends and Turn Them Loose’ This is hard to do. We try to hold things close to our chests, particularly those of us with law enforcement backgrounds. But, it is important to do. Once you educate them, trust them and turn them loose.”

Kelby Ouchley, Manager, Black Bayou Lake, NWR



It is frequently helpful to place a discussion about self-interests on the meeting agenda, and then to revisit the topic every six months or so as ideas and interests change. Interests also need to be discussed anytime new members join the board or subcommittees, and as Refuge managers and staff change.

Creating a Mutually Defined Vision

Most experts on collaboration and partnerships agree that vision plays an important role not only in the start-up phase of an organization but throughout the organization's entire life cycle. Vision is what points the way for all who need to understand what the organization is and where it intends to go. Inevitably, a time will come when an organization needs to refocus that vision to address changing needs and realities.

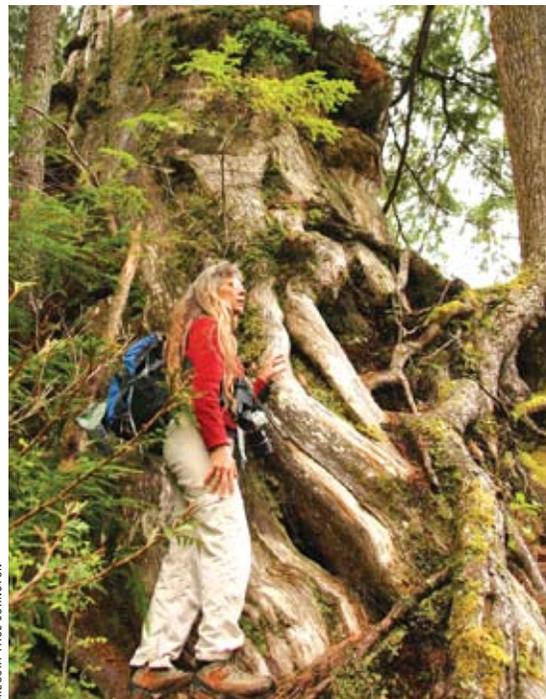
The Friends/Refuge collaboration needs a mutually defined vision. It is through an understanding of this shared vision that reasonable goals and plans can be developed.

Defining the vision takes time. It is an outgrowth of a mutual understanding of the needs of the refuge, the Friends and the interests and abilities of the collaboration's leaders. The vision helps define boundaries for the relationship, and may help motivate the collaborating partners to resolve conflicts and strive toward common goals.

“The refuge manager who interacts with the Friends has to be a leader. There is a big difference between being a manager and being a leader and it has to do with vision. Charlie has a vision; the Friends have that vision; and the vision is in alignment with the purposes of the refuge.”

Beverly Arnoldy, President, Friends of Willapa NWR

Successful collaborations have a clearly stated vision, one that is written into the partners' governance agreements or bylaws. This ensures that everyone understands and agrees to the *same* vision. Or, stated another way, without a vision statement, separate self-interests can defeat collaborative interests.



GREGORY PAUL JOHNSTON

Teal Slough at Willapa Bay NWR in Washington



Sharing Power

Power in a successful Friends/Refuge collaboration is *shared*, but this does not imply that it is *equal*. In their book *Collaboration Handbook: Creating, Sustaining, and Enjoying the Journey*, Michael Winer and Karen Ray (1994) write: “Power is always present and is never equal. However, in a collaboration we do not seek *equality*. Instead, we search for *equity*; we acknowledge and value the different types of power each person and organization bring to our joint effort.”

Shared power for the collaboration does *not* mean that Friends manage Refuges or that the Refuge manages the Friends. Indeed, when it comes to refuge management, the buck stops with the Refuge Manager, who holds the legal authority for ensuring refuge mandates set by the U.S. Congress are met. Likewise, the Friends board holds a legal responsibility for managing the organization according to nonprofit laws and regulations. The imbalance of power needs to be discussed openly—and not allowed to stop the group from developing a truly shared vision.

Shared power means that *everyone*—Friends members and Refuge management and staff alike—holds the responsibility for creating the vision and ensuring the success of the collaboration. There must be a commitment to shared goals, a jointly developed structure and shared responsibility.

The ability to share power stems from a trusting relationship, an understanding that each of the collaboration’s members is committed to the Guiding Principles for the Friends/Refuge Relationship (Appendix A). As many have noted from past experience: “Empowerment means not simply that you have freedom to act; it also means you are accountable for results.” The stories at Black Bayou Lake and Willapa NWRs illustrate how building trust, having a vision, and sharing power can lead to amazing achievements. See these stories within this handbook and the advice offered by Mentors for more details on building a solid collaboration.

Nurturing a Solid Collaboration: Mentor Advice

NWRS Friends Mentors have identified the following key ingredients to nurture a successful and sustainable Friends/Refuge collaboration:

Refuge Manager Is Directly Involved in the Partnership

The manager serves as a leader and visionary—and sets the stage for the collaboration. The manager helps create a cooperative environment, engages the staff and shows Friends that they are valued partners. While a manager may sometimes necessarily delegate day-to-day projects to a staff member who acts as Friends liaison, the manager cannot delegate his or her leadership role. When the manager is not directly involved, it sends a message to the Friends and staff that the collaboration is not important. Charlie Blair, FWS Mentor and Manager of Maine Coastal Islands



FUCKER / JSLATER18

Trial signs at Quivira NWR



NWR Complex, advises: “Managers need to be involved—intensely. A bad start is worse than no start. It takes much more energy to recover from a bad start than to put the time in to make everything work well from the beginning.”

Mark Musaus, Manager of the Arthur R. Marshall Loxahatchee NWR and FWS Mentor, agrees that a manager cannot delegate vision and leadership, but notes that once the relationship is well established, delegating certain responsibilities to staff (e.g., monthly meetings) can be a healthy step. He writes:

“I agree this is critical (for managers to attend every meeting and function) when a manager first comes on board and when starting up a Friends group. I believe this was a critical step in helping the Friends of A.R.M. Loxahatchee NWR move from a Cooperating Association to a Friends group and to be successful. When they saw my belief in them and my support they responded accordingly. However, over the last couple of years I have handed over the monthly meeting participation to my deputy, for two reasons. One, I travel a good bit due to the complexity of the job and off site meetings. Secondly, it gives my deputy a chance to interact with the Board and for him to appreciate and know what the Board is doing. He fully speaks for me and makes decisions, so the board is not waiting to get back with me.

That said, I attend several board meetings a year, have contact throughout the month with the Friends President and make myself available for any discussions the board wants, or for critical decision making. I guess what I am saying is that I am still committed to the Friends and they know it. I just don’t attend every meeting.”

A key role of refuge managers is to provide vision and leadership to the Friends/Refuge collaboration.

From an interview with Charlie Stenvall, Manager, Willapa NWR

Refuge Staff Is Engaged in Collaboration

In order for the Friends/Refuge collaboration to succeed, the relationship must be nurtured at all levels of each organization. Refuge staff spend a lot of time working with the Friends—on events, work projects, educational programs—everything that they do. Staff play key roles in making volunteers feel welcome and valued. By interacting with staff, Friends members learn about the refuge and begin to see resource management through their eyes. As staff members experience the direct benefits Friends bring to the refuge, they learn to value these contributions. This two-sided process builds mutual respect.

Dave Hilley, FWS Mentor and Manager at Quivira NWR, notes that when their Friends/Refuge collaboration began, the staff was worried: “what are they (the Friends) going to do?” Dave says he “never required staff to attend Friends activities, but asked if they would. They did, and everyone was professional. Staff saw how great it was and bought into it. Today staff spends a lot of time working with the Friends and see the value of it.”



Be Educated About Each Other

Many partnership experts advise that, right from the start, the group needs to devote energy and time to developing mutual respect, understanding and trust. It all begins, they tell us, with simple, common courtesy: take time to learn about the others around the table—both the individuals and the organizations they represent.

From the outset, members of the Friends of Tennessee NWR recognized they needed to be better educated if they were to be effective “ambassadors” for the refuge. As a result one goal for their first year was as follows:

Friends will have a clear understanding of the National Wildlife Refuge System and Tennessee NWR and how the Friends fit with the refuge. As a result, well-trained Friends Board members will be able to develop and deliver a clear and consistent message.

To accomplish this goal, meeting agendas included staff member presentations. Board members have also attended national and regional Friends conferences. These efforts have helped build trust and strengthen the bonds between these partners. They are also preparing the Friends to become effective advocates and educators.

This type of education is critical to the Friends/Refuge collaboration, as NWRS Friends Mentor Molly Krival notes: “Lack of knowledge severely hampers the effectiveness of Friends and often leads to loss of goodwill.” She offers the following list of areas where Friends need to become educated.

Friends need to learn about or upgrade their understanding of:

- The entire Refuge System.
- The FWS, including Regional Offices and general offices of the Department of the Interior.
- Regulations governing how FWS staff work
- The ecosystems and wildlife locally and regionally
- How to intervene on behalf of refuge funding and regulations with decisionmakers
- How to become acquainted with their congressional representatives and be effective advocates.
- How local and state governments (Planning and Zoning in particular) can affect refuges.

It is equally important for Refuge managers and staff to learn about what it takes to develop and sustain a Friends organization. Gaining an understanding of such topics as volunteerism, membership development, nonprofit regulations, advocacy and Board development, will help the Refuge partner better support the growth of the Friends group.

Clarify Goals, Roles and Expectations

In successful collaborations the partners clearly understand what is expected of them and what they can expect from the group. These things have to be addressed and discussed directly, and not simply assumed. A letter of agreement can be valuable tool, spelling out the roles, rights and responsibility of each partner. This letter could also state the basic values and philosophy of the group.



It's important for Friends and Refuge partners to consider what they expect of each other in the relationship, what they want to achieve together, and what each partner's roles are. These discussions take time and need to be revisited regularly (i.e., as part of the annual planning process) and revised as appropriate.

It is also important to recognize, however, that sometimes members of the collaboration can become swept up in the excitement of doing—and to forget to take the time to have these discussions. The danger, in the long run, is increasing confusion about roles and expectations. This confusion could lead to mistrust and lost of respect, and it could ultimately damage the relationship.

Mentors highlight the importance of creating a written agreement to guide the collaboration. Many Friends organizations have agreements with the FWS that allow them to manage sales outlets on the refuge. This agreement should clearly define roles as they relate to the store, but might not define the relationship overall. To create a sustainable relationship, it is important to define the mission, vision and goals of the *overall* collaboration.

Curt Buchholtz, FWS Mentor and Executive Director of Rocky Mountain Nature Association, recommends creating a “best practices” document that sets the operation standards and establishes a basis for expectations. For an example, see the Rocky Mountain Nature Association's best practices document in Appendix B. These practices were designed for an institution that is larger than most Friends organizations; however, the document provides useful tips for assessing how the partnership is going.

“I don't have any secrets from my Friends. We have frank discussions and I don't hold anything back.”

Charlie Stenvall, Manager, at Willapa NWR

Clarify Communication System

Good communication is the basis for building trust and understanding between Friends and Refuge partners. A “no secrets” policy is a critical element in creating trust and is part of the formula for good communication. Everyone needs to take responsibility for establishing a good system for communication and ensuring that the process is working well. Without a good system in place, the rumor mill will prevail and the relationship will deteriorate.

To facilitate good communications, NWRs Friends Mentors recommend locating Friends' offices in the Refuge Headquarters office. They also recommend having Friends members and Refuge managers and staff attend each other's meetings, whenever appropriate. The Friends/Refuge partners at Tennessee NWR have followed this advice and report very positive outcomes. In places where travel distances can create barriers to communications, tools such as e-mail and conference calls can effectively bridge the gap. In an extreme example, since Friends members live all around the country and the Refuge is so remote, the collaboration between Friends and FWS for Midway NWR and Friends of Alaska NWRs are managed almost exclusively through the telephone and e-mail.



Additional Resources

The Fieldstone Alliance at www.fieldstonealliance.org offers a wide array of tools and publications (for purchase and online viewing), including these excellent books:

Mattessich, Paul W., Murray-Close, Marta, Monsey, Barbara R. (2004). *Collaboration: What Makes it Work, 2nd Ed.* St. Paul: Amherst H. Wilder Foundation.

Ray, Karen (2002). *The Nimble Collaboration: Fine-Tuning Your Collaboration for Lasting Success.* St. Paul: Amherst H. Wilder Foundation.

Winner, Michael, Ray, Karen. (1994). *Collaboration Handbook: Creating, Sustaining, and Enjoying the Journey.* St. Paul: Amherst H. Wilder Foundation.

Collaboration assessment tool

Assessing Your Collaboration: A Self Evaluation Tool by Lynne M. Borden at www.joe.org/joe/1999april/tt1.html

THE MODEL PARTNERSHIP



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 NWRFS 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." □



FLICKR / 2THEGALAPAGOS

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. □



Key Element **3**

A Well-Managed Organization



FLOCKR / JCP/PICS

Heron at Squaw Creek
NWR, Missouri



Creating a successful Friends/Refuge collaboration is directly related to how well the Friends organization is managed, regardless of its size. Poor management predisposes the organization and the collaboration to failure. While Board members are responsible for managing the organization according to nonprofit principles, everyone in the partnership plays a role in assessing the effectiveness of management.

This section highlights topics that mentors have identified as being the most common stumbling blocks for Friends/Refuge partnerships:

- Organizational Life Cycles
- Board Management and Structure
- Committees
- Meetings
- Communications Systems
- Membership Development
- Managing Finances
- Weathering the Storms

Each of these topics will be discussed in the following sections. The information provided should be viewed as a starting point. Readers are encouraged to become better informed on these and other topics by reviewing and discussing the resources listed in greater detail at the end of each section.

Organization Life Cycles

All organizations go through well defined life cycles. Bruce Tuckman published a popular model in 1965, where he describes a cycle of stages that involve “forming, storming, norming, and performing” and notes that leadership styles change as teams mature. In 1975, Tuckman added a fifth stage, “adjourning,” as an adjunct to the stages. The first four stages relate to managing and developing a team, while this fifth stage is more relevant to the people and their relationships as a result of participating in the team. Characteristics of each stage are as follows (From Tuckman, 1965 and Chapman, 1995):

Forming

- Team depends on leader for guidance and direction
- Little agreement on team aims, other than received from the leader
- Individual roles and responsibilities unclear
- Processes often ignored



Storming

- Leader coaches
- Group decisions don't come easily
- Team members vie for positions and may challenge each other as they establish themselves in the team
- Clarity of purpose increases but uncertainties persist
- Cliques and factions form, and may become power struggles
- Team needs to focus on goals to avoid being distracted by relationships and emotional issues
- Compromise may be required to enable progress

Norming

- Leader facilitates and enables; team shares some leadership
- Team forms agreement and consensus
- Big decisions made by the group; smaller decisions may be delegated to individuals or small teams within the group
- Commitment and unity is strong
- Team engages in fun and social activities
- Team discusses and develops its processes and working style

Performing

- Leader delegates and oversees; team has high degree of autonomy
- Team has a shared vision, is clear about what it is doing and why, and is more strategically aware
- Team focuses on goals and uses agreed upon criteria to make decisions
- Disagreements occur but are resolved positively, team processes and structure are changed as needed

- Team members look after each other, and attend to relationships, style and process issues

Adjourning

- Team task is completed and the group breaks-up.
- Team members feel good about what is achieved and move on to new things.
- Closely bonded team members may sense insecurity from the change

Other team development models have been described. Regardless of the model, it is clear that teams move through cycles of development; and most authors agree that there's no skipping of the steps—teams must work through each stage before moving onto the next. The stages are cyclical, meaning teams will revisit stages at various points along the way (e.g., when a major leadership change has occurred, or when a vision has been met or a strategic plan is completed). A performing group may go back to storming for a while as it revisits its direction.

It's helpful for Friends/Refuge partners to understand where the organization and partnership are in terms of life cycle. For example, some folks worry when the group feels stuck, but if everyone recognizes that the group is in a storming stage, they can set aside personal frustrations and work more readily through the issues at hand. If a performing team strategically plans for transitions (e.g., completion of major goals) and understands that growth means revisiting the storming period for a while, the team members may be able to more quickly move through the stage.



Different stages require different styles of leadership. Forming/storming groups will need a leader that provides more direction, while a performing group would be stifled by that style of leadership. A storming group that has a leader who delegates may struggle to move out of that stage because the group needs the guidance of a coach. Ann Smith, President of Friends of Black Bayou Lake NWR, reports that changing the style of leadership as the group's life cycle changed has been important to the success of her organization. Sustaining the collaboration means Friends/Refuge partners take the life cycle into consideration when they seek new leaders for the organization.

While we expect to sustain Friends/Refuge collaborations for the long run, the adjourning stage is still relevant and must be addressed as appropriate. Significant projects come to an end; people retire, move or step away; a vision can be accomplished—these are all endings of a sort, requiring a group to reevaluate and reconfigure. Sometimes changes are so significant they require partners to begin anew. Closure may create emotional turmoil for some individuals in the collaboration. The feelings must be acknowledged—sometimes with celebration, sometimes with honest discussion, sometimes with both. Recognizing adjournment as another stage in the life cycle of an organization can help members manage the change and move on.

Sustainable Friends/Refuge partners understand that life cycles affect leadership needs and organization performance capabilities. They use strategic thinking and planning to manage the organization and partnership. To learn more about organizational life cycles and evaluate the stage your organization is in, see the resources listed below.

Additional Resources

Burns, Michael (1997). *The Juvenile Stage of Governance: What to do about Junior?* At Brody-Weiser-Burns <www.brodyweiser.com/pdf/whattodoaboutjr.pdf>

Burns, Michael (1997). *The Organizational Life Cycle and How it Affects Your Board.* At Brody-Weiser-Burns <www.brodyweiser.com/pdf/actyourage.pdf>.

Heinze-Lacey, Beverly, Mehaffey, Maggie. (1997). *Taking Flight: An Introduction to Building Refuge Friends Organizations.* Washington, DC: NWRRA, p. 48.

On the Road to Performing

The Friends/FWS Partnership in 2005

In July 2005, the Friends of Tennessee National Wildlife Refuge was a newly formed organization. The initial steps for establishing the organization had been completed and the group's next question was "What's next?" Mentors were invited to help the Friends/FWS partners formulate a plan of action for the future.

Mentors began the process with a period of exploration in order to learn about the refuge, the community and the partnership. The refuge encompasses more than 50,000 acres in northwest Tennessee that stretch for 65 miles along the Tennessee River. The Refuge headquarters is in Paris, TN, a farming community of approximately 10,000 residents (the 567 square-mile county has 30,000 residents). The refuge was not well known by residents in the surrounding communities. The key goal and challenge for the Friends/FWS partners was to engage and educate the community and build support for the refuge.

Mentors found the partners had a number of assets that would help solidify their collaboration and meet the challenges they faced:

- Friends and FWS members had established a positive, friendly personal relationship with each other.
- Friends board members had important connections in the community (local newspaper and key nonprofit and educational organizations).
- FWS staff and Friends members alike recognized they were responsible for helping the Friends to succeed.

Most notable was the willingness of the Friends and FWS members to enter the collaboration with an open mind and a desire to learn about each other and the possibilities for the partnership. >>

TENNESSEE AT A GLANCE

The Refuge

- Established in 1945 to provide food and protection for wintering migratory waterfowl and other migratory birds.
- Located in Paris, Tennessee (Pop.~10,000), the refuge's three units, Big Sandy, Duck River, and Busseltown, stretch for 65 miles along the Tennessee River.
- Diverse habitats include open reservoir waters, bottomland hardwoods, high quality oak/hickory forests, freshwater marsh, agricultural lands and moist soil managed impoundments. The refuge provides ample feeding, nesting and resting areas for many bird species, mammals, reptiles and amphibians, and fish.
- Visit <www.fws.gov/tennesseerefuge>

The Friends

Established: 2005
 Membership: 119
 Annual Budget/Expenses: \$10–20,000
 Visit <www.tnwrfriends.org>

Mission

To promote the natural and historical resources of the refuge, foster its use and enjoyment by the public consistent with the protection and preservation of its environment and engage in such educational, scientific and civic activities that will assist the management in carrying out its mandates.

Accomplishments

- Received a \$5,000 grant
- Contributed more than \$6,500 to refuge projects
- Shoreline cleaning project
- Sponsored four major Friends events

The focus of the mentors' visit was to set the stage for the future of the collaboration—to help the partners begin moving out of the forming stage and toward accomplishing their goals (norming and performing). During the meeting partners identified what they wanted the future to look like, what strategies they would use to create that future and what barriers might impact their goals. A number of goals and related strategies emerged from the session (see sidebar). The mentors left the partners with the challenge of prioritizing these goals and strategies and selecting the first projects to tackle.

As the mentors departed, the Friends/FWS partners at Tennessee NWR knew they had successfully moved out of the forming stage and into the storming stage.

The Friends/FWS Partnership — One Year Later

In the year after the mentoring session, the Friends/FWS partners at Tennessee NWR experienced tremendous success and growth. First year membership goals were nearly met. Together they completed a major shoreline-cleaning project. The partners developed an effective relationship with their elected officials (US Congressman John Tanner and State Senator Roy Herron) who officiated at a new trail opening.

The Friends/FWS partners spent time learning about each other. Those efforts served to continually improve their working relationship and ability to effectively manage the Friends organization. The Friends also developed a newsletter, and established their website.

In a group interview with Dan Dziekonski (Friends President) and Anne Williams (Vice President), John Taylor (Manager) and Joan Stevens (Refuge Ranger), these collaborators discussed their first year's journey.

Q: What have been the key elements to the collaboration's success?

Dziekonski: Several board members had prior personal ties to the refuge staff and manager, which made building the relationship easier. Mentors had suggested that the Friends' mailing address and all business be conducted in the refuge office. Sharing office space makes it very easy to have contact with each other—this has been really important.

Williams: Board meetings have included members of the staff who have come in and told us about their jobs on the refuge. This has been really helpful—it has given Friends members an understanding of staff concerns and ideas and made us better aware of where the Friends organization could be most helpful.

“What a great year we have had! Starting its second year the Friends of Tennessee Refuge already has over 60 members, thousands of dollars in the bank, has been awarded a \$5,000 grant, and Joyce (a Friends board member) is putting the final touches on a huge grant to restore the Chickasaw Trail. The Friends Group has already contributed more than \$6,500 to refuge projects and law enforcement support, and we have had two great Friends get-togethers. What can I say but ‘wow...you guys are awesome!’”

John Taylor, Manager, Tennessee NWR, Friends Newsletter, January 2006

Taylor: Engaging the staff in the mentoring session helped them accept the Friends. Before that, the staff wasn't really sure what to think about the Friends. Having staff attend Friends meetings gives them an opportunity to "toot their horn" and also gives them ownership in the success of the partnership. Also, in meeting with the board, I discuss things others may want to keep close to their chest. This brings trust into the relationship. Our Friends group is doing great things and it gives me lots of pride. I enjoy bragging about our Friends and staff to my superiors!

Q: What have been the most difficult challenges?

Stevens: The collaboration is evolving. We're still trying to figure out roles and how the Friends mesh with the Refuge. We're still going from project to project, but we're looking at exactly where we want to be in the future.

Dziekonski: One issue with start-up is trying to find expertise in different areas. We've had some frustrations with pulling together the newsletter and website. Things will get easier, and we know it takes time to see results.

Taylor: Developing a clear vision and becoming more noticed in the community. Membership development is, in itself, helping with this. We just have to work harder at making it such a fun group that everyone wants to join.

Q: What are the two or three best things they've done over the last year?

Williams: Getting the word out. When I talk about the organization, people have heard of us. We're getting the word out better than we thought.

Dziekonski: I'll second Anne. People who weren't at the trail dedication asked how it went—and these were people who aren't members.

Stevens: Attending the national and regional workshops. Board members that have attended have gained a much better and broader perspective for the Friends.

Taylor: As managers we're apprehensive about new things—we worry about time, the burden on staff—but the effort with the Friends has been value added. Opportunities have been presented and avenues have opened that up I wouldn't have expected before. We've let go of our fears!

“‘Don't fear.’ As managers we're apprehensive about new things—we worry about time, the burden on staff—but the effort with the Friends has been value added.”

John Taylor, Manager, Tennessee NWR

Q: What's next?

Dziekonski: We want to do more with environmental education. Joan's specialty is education and she is getting into the school system. We want to look for grants to bus kids out to the refuge for field trips. That's an immediate and attainable goal for the next six months.

Stevens: Our challenge is to broaden our scope, to expand the board or build more committees. We have a small pocket of people doing all the work and we need more to help.

Q: What advice would you give others?

Dziekonski: Don't be afraid to fail. Don't be afraid to try something new. If you do fail, chalk it up to learning. Writing down what went well and what could be done better will help with planning and improving things for the future. I was in the military and we had a motto: "Lead, follow or get out of the way." I think that's a good message for Friends—don't just sit still.

Taylor: Be very open and the Friends will do good things. Keep new and exciting things happening and build diversity. >>

The Friends/FWS Partnership — Stepping into the Future

The Tennessee NWR Friends/FWS partners clearly have much to celebrate. They are well on the way to creating a vibrant, sustainable collaboration. They have begun norming and performing at many levels, but the partnership is still very much in the storming stage of development.

Friends President Dziekonski believes the next step is to prepare members to transition into a strategic thinking Board and partnership. He states, “Right now when we get to the point that we have checked all the boxes on our list, there isn’t a good method for adding new items and ensuring that they are consistent with the direction that we want to travel.” He worries about being too focused on the things that are finite and quantifiable. He states, “We could lay out goals based solely on [actions]...such as recruit 100 new members or develop 1.5 miles of new trails per year. We might accomplish every single one on the list, and yet be totally ineffective and dysfunctional as a group.” Dziekonski acknowledges the importance at this point in the organization’s history to develop *capabilities*: “I want a set of guiding principles or tenets that focus the efforts of the group. From that we can develop the specifics.... As the list gets completed, we have our principles to guide us as we explore new projects and goals.”

Doing the “process work” to become strategic is an important step in the evolution of a sustainable collaboration, one that may challenge members who feel more comfortable with tangible projects. The transition for these partners (and many other new Friends/FWS collaborators) will require a blend of continued work on concrete actions with regular discussion about the future. The transition into a fully performing collaboration may take a number of years, and will require persistent attention to vision, goals, relationship building and organizational development. □

Tennessee NWR Friends Collaboration First Year Goals and Accomplishments

During the mentoring session, Friends members and FWS staff and managers developed goals and strategies to focus on during their first year. The prioritized goals are listed below, along with action items accomplished or nearly completed during the partnership’s first year.

1. Work on a variety of projects to develop or improve trails, photo blinds and habitat.

- Completed Britton Ford Trail
- Renovated Chickasaw trail
- Publicized the two trails
- Developed and printed refuge maps for sale
- Completed an outdoor classroom for environmental education programs
- Developed frequent “refuge helping” projects for members and community to become involved in

2. Develop a big roster of members and volunteers.

- Raise local awareness of refuge issues
- Hold Friends special events four times a year
- Develop strong attendance for annual membership meeting
- Involve local college students to help with activities

Other anticipated accomplishments:

- People in the community participating in some refuge activity and reporting a pleasant experience that they look forward to repeating
- 100 members — 20 corporate sponsors; 5 benefactors: increased membership, steady fund building and continued growth as an organization

3. Friends will have a clear understanding of NWRS and TN-NWR and how Friends fit with the refuge. As a result, well-trained Friends board members will be able to develop and deliver a clear and consistent message.

- Educate the Friends board: include training in the board meetings; offer field trips to the refuge; provide information about staff positions and refuge issues; have board members attend Regional workshops and Friends Conferences and training at NCTC for continuing education.
- Educate the Public:
 - Invite the public in for interesting and educational activities (3-4 times a year)
 - Increase involvement with local school/civic groups to promote the refuge and environmental education

Other anticipated accomplishments:

- Develop educational activities on the refuge for Boy and Girl Scouts, 4H and Explorer Club groups

4. Advocacy.

- Help the refuge gain better Congressional visibility and community support
- Congressman Tanner and State Senator Roy Herron officiated at Britton Ford Trail Dedication

5. Transmit Refuge/Friends information to a wide audience. Establish communication between staff/Friends/public to promote membership, outreach, education, and projects.

- Print quarterly newsletter by Friends group members
- Create membership mailing database
- Establish full service website
- Establish weekly communications between Friends group leaders and refuge staff
- Get weekly columns about refuge events and animals printed in local newspaper
- Develop outreach materials for the public (newsletters, leaflets, etc.)

6. Raise funds.

- Secured startup grant and applied for additional project grants
- Developed and printed refuge maps for sale

7. Build and maintain a collaborative relationship between the Friends group and staff with common goals.

- Become a sounding board for refuge ideas
- Have ownership in the refuge and its management
- Participate in planning quality “Big Six” activities to make citizens more aware of refuge mission
- Facilitate a joint Friends/refuge event/festival
- Provide activities for members that are fun, but allow them to appreciate the refuge and its operations.
- Work with Refuge and Friends towards common goals

Other anticipated accomplishments:

- The community of Paris loves Friends of TN-NWR
- Friends shows signs of stability and growth: more than 100 members; financially stable with funds allocated to finish projects begun; work on projects under way, and planning projects to come. All board members will know all refuge staff and all refuge staff will know all board members.

7. Develop partnerships that will help the Friends and the Refuge.

Although no specific action item has yet been accomplished in this area, relationships are being nurtured and partnership opportunities are being explored with local schools and a variety of environmental nonprofits and state agencies in the area. □



Board and Structure

A well-functioning, well-organized, dynamic board is important for creating and sustaining a successful organization. Board development is an ongoing process that must be high on everyone's priority list.

What Does the Board Do?

While overall success of the Friends organization is a partnership effort, the Board of Directors holds “the principal responsibility for fulfillment of the organization's mission and the legal accountability for its operations.” (O'Connell, 1993, p. 20).

Each board member is personally responsible for managing and leading the organization, according to O'Connell. He observes that:

“On the most basic level, a board member should understand the mission of the organization, attend board meetings, serve actively on at least one committee, be certain that [he/she] and the board as a whole are in control of planning and evaluation, contribute to a sense of camaraderie and teamwork, and ask questions. It is fair to ask all board members, within their means and spheres of contacts, to contribute as much as they can and to help raise money.”

Nurturing and Transitioning Leaders

Finding good leaders for the board is cited as a common challenge facing Friends organizations. Rather than think strategically about how to attract and nurture appropriate leaders, many groups make the mistake of accepting whoever is willing to serve.

Attracting good leaders takes time, patience and planning. First, the Friends/Refuge partners must understand what qualities they need from their leaders. Depending on the organization's life cycle, different styles of leadership will be necessary: younger organizations generally need a President who can take charge, while older organizations will want a President who delegates and acts as a coach, with board members who hold themselves accountable.

Another step is to decide what jobs need to be completed and the specific skills required to complete them. Having a vision, goals and a plan in place will help determine the type of people needed for the board. O'Connell (1993) has suggested charting what skills are needed and then to seek people with the required skills. He writes:

“Effective people turn down appointments [to boards or committees] not because they are uninterested, but because the assignments are put to them in such a vague way that saying yes could lead into a bottomless pit of responsibility. Often we ask a person to come aboard without making clear exactly why we want him to her and without breaking the task into reasonable proportions... The greatest temptation in recruiting volunteers is to



make the job sound easy...It is better to give the individual a clear picture of the assignment, so that when you get a yes, you will know you've got someone who is committed to getting the job done. It's better to get a few no's than to end up with someone who isn't likely to produce or who can't be held accountable because there is no mutual understanding of what is to be done."

Friends/Refuge partners must have a system in place to nurture new leaders. The approach taken by the Friends of Willapa NWR has been to build three tiers of membership—The Board, Active Members, and General Members. This Friends organization nurtures leaders by providing many opportunities to engage and build relationships with its regular volunteers or Active Members. Active Members show they are committed to the organization's principles and the collaboration's vision—they become future board members.

The board needs to institutionalize regeneration of its members by restricting board terms in the organization's by-laws. A three-year term with a year off in between terms is a fairly common practice. Staggering terms is important to maintaining institutional memory. FWS Mentor Molly Krival writes, "Friends that do not restrict terms become overworked and seriously restricted in how they will choose and develop projects."

Thus board development should be high on every current board's agenda. Too often Friends/Refuge partners leave this to chance, and that may lead to an array of preventable problems. A stumbling block seems to be that partners have trouble

deciding where to begin. Members may say "but we don't know where to find anyone!" Molly Krival has defined a process (using an "Acquaintance Map," p. 105), based on work done by Terrie Temkin, Nonprofit Management Solutions, that will help identify potential candidates (Appendix D). For the longer term, partners need to establish ways to build the middle tier—active members who will become the source of new board members for the future.

Current board members should be encouraged to regard almost everyone with whom they come in contact as possible recruits. They can, start the cultivation process by sending these individuals newsletters and invitations to events. Thus, when it's time to nominate future board members, they should have a wide range of individuals from which to choose, based on the responses to their cultivation efforts.

One of the most important committees Friends Boards should establish is the nominating committee—a first step toward creating a culture of ongoing leadership development and transition.

A Well-Functioning Board

The sustainability and success of a board is closely tied to the culture it creates. First, let's take a look at some board cultures that are *not* sustainable:

- The President (and maybe one or two others) does all the work. Board members rarely offer suggestions or agree to lead initiatives. Long-term outcome—The leader burns out and steps down, and no one is willing or able to lead the organization.

A Guide for Defining Board and Committee Member Roles

- Does everyone have a job?
- Does every job have a title?
- What is the purpose of the position?
- What are the key responsibilities?
- What are the qualifications required?
- How much time must be committed?
- What does the organization commit to the individual?
- Is there an agreement form?

From Molly Krival, FWS Mentor, "Ding" Darling Wildlife Society adapted from NonProfit Management Solutions, Inc. 1999



- Meetings drone on for hours, few decisions are made, no one is held accountable for following through on actions, and little is accomplished. Long-term outcome—board members drift away, no prospects can be found to fill their places, enthusiasm is lost and the organization crumbles.
- One or two board members are demanding and outspoken while others rarely voice their opinion. Decisions are driven by the most outspoken. Diversity is lost. Long term outcome—the organization is viewed as an elitist club, Board members drop out, the remaining board loses sight of its mission and vision, and the collaboration suffers or collapses.
- Meetings are spent criticizing plans and programs that never meet the particular standards of various board members. Members feel attacked and unappreciated. Long-term outcome—new initiatives disappear, board members quit and a negative culture prevails that prevents realization of goals.

It's easy to fall into one of these (or other similarly destructive) board cultures. Each person brings different talents, personalities, communication styles, values, and interests to the organization. The challenge is to create a setting that support each person's talents and brings out his or her best while setting limits on unproductive or damaging individual behaviors.

Here are some key areas partners can work on to move toward a well-functioning board:

Give everyone a job

The executive team (President, Vice President, Treasurer and Secretary) have specific roles regarding the leadership of the organization (for more information, see resources below). The other board members also need well-defined jobs. These should be described in writing and provided to prospective members before they join the board. Board members should be expected to lead a committee, which includes identifying committee members and finding a replacement for themselves if they need to step down. Giving board members specific jobs and holding them accountable helps sustain the organization. Clearly defined jobs will also help attract and identify new leaders and ultimately should help increase job productivity.

Nurture relationships

Nurturing relationships is as important to board functioning as it is for the collaboration overall. Board members who don't know each other will have difficulty working together. Set aside some meeting time for board members

“Emphasis needs to be placed on respect for everyone’s accomplishments and ideas. Personal attacks should not be tolerated. We accept that people have differences but discussions...should seek diversity rather than punishing it so that decisions will be made with the widest available options. Many boards and committees seek quick decisions by an ‘in group’, ostracize those with different ideas, and end in serious conflict and less effective decisions.”

Molly Krival, NWRS Friends Mentor



to learn about each other. This should be done when new members come on board and at regular intervals throughout the year. Understanding each other's personal interests ("What's in it for me?"), personalities, talents and working styles helps everyone work better together. Celebrating is an especially helpful tool for building camaraderie and should be integrated into the board culture as a regular activity. Plan enjoyable outings together (e.g., hiking the refuge, birding) to learn more about the refuge and each other.

Leading an organization demands a lot of board members. Successful partners create a culture where everyone agrees that nurturing board relationships is a priority.

Expect accountability

Everyone must agree to hold him/herself accountable to the organization and to each other. This is not solely the job of the board President but extends to all board members and Refuge partners, as well. Board members should sign a written agreement that outlines their responsibilities. These agreements clarify what's expected and formalizes the process by having the member sign a written commitment.

Another tool to hold members accountable is to structure board meetings around the vision and action plans, where each board member is expected to report on progress made toward accomplishing his or her assigned projects. Board members who cannot or will not fulfill their responsibilities should be asked to step down. This meeting format creates a culture where members are held accountable and makes measuring progress and performance relatively easy.

Honor diversity

A diversity of talents, skills and personalities enriches a board but it may also lead to conflict. Personalities can clash, working styles may differ and values may vary. To avoid or minimize conflict, boards sometimes resort to squashing divergent ideas, ignoring the more quiet members over the assertive ones or skirting difficult issues. These avoidance actions cause distrust, and they can result in dissatisfied members and lackluster performance. These pitfalls can be prevented by nurturing stronger relationships and using techniques that encourage participation (see sections that follow for further discussion).

Become well educated

Board members must learn about their refuge and the FWS—and become well educated about nonprofit management. Temkin (October 23, 2003) identifies five actions required of board members to fulfill their responsibilities to the organization:

- Read and understand financial statements.
- Be familiar with indicators that report the status of the organization. These indicators are set by the board, (e.g., membership data, expense and revenue projections) and should be presented at each meeting to help members make strategic decisions.
- Be knowledgeable about the mission, vision, values and goals of the organization and understand what criteria will be used to screen decisions.
- Come to meetings prepared (e.g., read materials and clarified questions in advance of the meeting).



Refuge staff is integral to the effective work of Friends. There should be multiple opportunities for staff to share their professional goals and methods with the Friends and they should be recognized and applauded as well as Friends. Failure to do this often leads to misunderstanding, loss of effective support and loss of goodwill from both groups.

~Molly Krival, NWRS Friends Mentor

- Ask questions (e.g., Why do we want to do this? How will this decision affect our members, the refuge? What are the downsides?).

Ongoing education must become part of the board culture. Board meetings can include an educational component, or certain meetings (e.g., every third meeting) can be set aside specifically for training purposes.

The FWS and the National Wildlife Refuge Association offer national and regional workshops that provide education on a wide variety of topics important to Friends Board members. Some Friends groups have joined forces and organized meetings to discuss mutual topics of interest. Universities and private corporations and nonprofit groups offer an abundance of websites, books and workshops, as well. To create a sustainable organization, board members must use these resources and become well educated about what it takes to manage their nonprofit organizations.

Additional Resources

Brody-Weiser-Burns (5/10/02). *The Board Chair* at <www.brodyweiser.com/pdf/boardchair.pdf>

Heinze-Lacey, Beverly, Mehaffey, Maggie. (1997). *Taking Flight: An Introduction to Building Refuge Friends Organizations*. Washington, DC: NWRA.

O'Connell, Brian. (1993). *The Board Member's Book, 2nd Ed.* New York: The Foundation Center

For a wealth of board management resources see NonProfit Management Solutions at: <www.nonprofitmgttsolutions.com> □

Managing Transitions

The Friends/Refuge collaboration at Squaw Creek NWR in Missouri was an outgrowth of a relationship with two different Audubon societies that had adopted the Refuge in the late 1980s. In 2000, members of the newly forming Friends organization sat with Manager Ron Bell to chart the future of their partnership.

Squaw Creek NWR is a well-visited Refuge (120–130,000 visitors per year); but in 2000, it had few facilities or programs for reaching the public. The partners recognized that the Friends could play a significant role in improving facilities and making connections with the public.

The Friends quickly set their attention to raising funds and building their volunteer base. The Friends first President, George Scheil, was well connected in the community and was instrumental in raising significant funds from a variety of sources, including the FWS Regional Office. In the following years, they have achieved many significant accomplishments (at right). They now have a membership of about 145 people and an annual budget of approximately \$45,000.

Through their fundraising efforts, the Friends organization has raised the visibility of the Refuge in the surrounding communities, and this support continues to grow. The Friends/Refuge collaboration has helped Manager Ron Bell make connections and improve the Refuge's working relationship with the community. "In the past there were lots of local rumors, but now people in the community get information directly. Everyone is better educated about the Refuge."

Bell and Friends President, Tommie Rogers, agree that communication is a key element to their successful partnership. They worked together to identify board members and educate them about their roles and expectations of the Friends/Refuge partnership. All board members have specific jobs, such as managing membership, overseeing finances or coordinating projects.

Friends President Rogers says she's involved because she loves nature: "I enjoy observing wildlife and especially wild birds so much. I want others to know what the refuge has to offer. If people don't come out here, they are missing something so special and unique in the state of Missouri. We have thousands of birds, butterflies, dragonflies and such a variety of snakes. Squaw Creek is an important stopover for migratory shorebirds, waterfowl >>

SQUAW CREEK AT A GLANCE

The Refuge

- Located in Mound City, Missouri (population ~1,100), a rural area.
- Established in 1935 as a resting, feeding and breeding ground for migratory birds and other wildlife.
- 7,350-acres located along the Mississippi Flyway in northwestern Missouri within the historic Missouri River floodplain.
- Best known for its large concentrations of snow geese, other waterfowl and bald eagles. The refuge is a major stop-over for waterfowl, with more than one-half million birds in the fall and lesser, but still spectacular, numbers in the spring.
- Visit <www.fws.gov/midwest/squawcreek>

The Friends

Established: 2001
 Membership: 145
 Annual Budget/Expenses: \$40–50,000
 Visit <www.squawcreek.org>

Mission

To promote the preservation of the natural and historical resources of the Refuge

Accomplishments

- Constructed Auditorium: \$277,919
- Constructed Outdoor Classroom: \$10,017
- Constructed Callow Trail: \$20,600
- Funded printing of Refuge brochures
- Trumpeter Display: \$600
- Propane pump: \$7,400
- Provide office staff on weekends.

and songbirds in spring and fall. And the refuge rivals some of the birding “hotspots” in the United States. There is always something for people to see when they visit.”

The Friends/Refuge partners focus their energy to make volunteering a positive social experience. Volunteers have many opportunities to interact with the public and each other. Rogers believes that volunteers keep coming back because the experience is so enjoyable and rewarding.

The Friends and Refuge at Squaw Creek have established a trusting, respectful and productive collaboration. Nonetheless they share wholesome concerns about the future. Rogers anticipates a move out of the area and George Schell, their first President, is currently unable to return to his former leadership role. Thus, the Friends board faces its second major leadership transition.

This highly functional collaboration experiences its growing pains as the partners consider how to sustain momentum through a leadership change. The partners recognize that everyone has a responsibility for ensuring the success of the Friends organization. Board President Rogers and Manager Ron Bell set the pace by striving to meet new members of the community, learning about their interests and considering their potential skill sets with the needs of the partnership. Such outreach efforts often lead to new members and volunteers and may ultimately generate new leaders on the board.

Bell has noted, “We’re still growing. There have always been speed bumps along the way, but it’s a growing venture.”

The growing pains and “speed bumps” at Squaw Creek are common experiences for Friends/Refuge collaborations around the country, especially in rural areas where volunteers can be hard to find. The Squaw Creek example shows how important it is for partners to work together to consciously manage their future. Over the years this collaboration has developed a number of attributes that will help sustain them through the transition. Among their collective strengths are strong personal relationships with each other and the community, a broad volunteer base, a shared vision for the future and the rewards everyone has experienced from participating in the collaboration. By thinking strategically and focusing on their strengths, the Friends/Refuge at Squaw Creek will ensure their relationship continues long into the future. □



An egret fishing at Squaw Creek NWR

FLOCKER / BRENT FULTON



A Strategic Approach for Creating a Vibrant Board

Beverly Arnoldy was the second President of the Friends of Willapa NWR. After being President for over three years, she said it was time to pass the reins to a new President.

Arnoldy had thought about the task of finding a suitable successor since she agreed to take the job three years prior. An experienced nonprofit manager, she knew that organizations need dynamic leadership. She also knew that the board members had to build leadership development into day-to-day management if they wanted the organization to survive and thrive.

Arnoldy had no refuge experience when she first encountered the Friends of Willapa NWR at a booth during a local festival. She was new to the community and could see the refuge from her house. She wanted to make a connection and understood the potential value of her background in nonprofit management. She joined the Friends and quickly received an invitation to serve on the board. And soon thereafter, she was elevated to Friends president. “It’ll be easy’ the other board members told me! Well, it *wasn’t* easy,” Arnoldy recalls, “but at least I was familiar with the challenge before I accepted the job.”

Arnoldy identified two problems that required immediate solutions before the group could move ahead. First, she noted, “The board was burnt to a crisp.” And second, there were just two board members doing all the work—with the expectation was that Arnoldy would also be a worker.

Healthy organizations have three tiers

- The Board
- Active Members
- General Membership

The middle tier is made up of active members who volunteer, but aren’t on the board—these are the people who will become board members of the future.

Beverly Arnoldy, President, Friends of Willapa NWR

This second problem resulted from the lack of a process for cultivating leadership. It was a “two-tiered organization” made up of board members and the general membership. Arnoldy reports that healthy organizations have a third, middle tier: the active members who volunteer regularly but are not on the board. This corps of active members are the people who will become board members of the future. “You must have a good middle tier to grow and stay vibrant,” observes Arnoldy. “We didn’t have those active members.” Her primary goal for the organization was to create this middle tier.

In her first year as president, Arnoldy instituted two changes: monthly board meetings and a requirement that board members attend every meeting, “Some board members,” she notes “resigned as a result.”

In Arnoldy’s second year as President, the board agreed to reduce their number from nine to seven. They found four new people who were committed to working to replace departing board members. Two of these people remain on the board. Arnoldy notes, “It takes a while to find the right people for the board. I didn’t know the community at first and it took a while to get to know people and find appropriate matches.” >>

In her fourth year, Arnoldy observed, “We have a great board. We have the same goals and same vision and everyone is committed to working.” She instituted jobs for each of the Board members, matching skills with organizational needs. For example, the Vice President, a high school science teacher, is in charge of the Environmental Education program. Other directors take charge of membership, publicity, refuge projects and volunteer coordination. For the first time, they have a nominating committee tasked to identify and recommend new candidates for the board. It took three years to get to this point. The old system — “take anyone willing to join the board” — simply was not meeting the collaboration’s long-term needs.

Arnoldy believes board members must always address how to develop the middle tier and nurture the leaders of the future. Her formula also includes a healthy quotient of enjoyable activities for members and board alike: “If people have fun they will come. If you offer regular venues for education and enjoyment, they’ll come back again and again. Volunteerism is a choice. If you provide enjoyable experiences, and this happens repeatedly, these people will become your active members.”

Being “burnt to the crisp” is no longer part of the culture of the Friends of Willapa NWR’s board. With a handful of patient, strategic choices, they made important strides toward becoming a dynamic and sustainable board. □



Committees

Decision making becomes faster and more effective, Karen Ray has noted, as power to make decisions is delegated to appropriate subgroups. She also added that decision-making structures and processes are closely tied to trust. The more partners trust one another, the easier it is to delegate decision making.

A working board will most commonly manage young Friends organizations. This means that the board members discuss and work on all of their projects. But as the vision, mission, goals and action plans of the organization become more defined, it will become harder to address all issues during a regular board meeting. The board will eventually need more people to accomplish the necessary work and will want to move into a committee structure. Spreading the work to committees is an important step in creating a sustainable organization. Indeed, Ron Tillier, an FWS mentor and former President of Friends Blackwater NWR (1999–2005), reports that moving into a committee structure transformed the way this Board functioned and laid the foundation for the organization’s current level of success (See Profile, Blackwater NWR, p. 88).

Committee development is a tool to begin creating the “middle tier of membership” described by Beverly Arnoldy of Friends of Willapa NWR (See Profile, Willapa NWR, p. 57). Members must be careful to form committees for useful purposes; Ad hoc committees that form around a specific project and then disperse when the project is completed are better than long-standing committees that wind up with little to do. There may be some committees that should endure: the nominating committee, for example, is very important because it is responsible for sustaining and regenerating the board.

As Friends/Refuge partners establish committees, they should consider the following:

- *A committee should be established with a particular purpose in mind, not just for the sake of having one.* This purpose and expected outcomes should be clearly defined and communicated. Committees, ad hoc committees, subcommittees and even task forces should have a written charge. Members sometimes mistakenly assume that everyone on the board has a common understanding of the task to be accomplished. Committees, and their subsets, should review their charge on a

“I firmly believe that the way the Board is structured is critical to how the group works. We used to have meetings that were three to three-and-a-half hours long — everyone got into everyone else’s business and chewed up ideas.

Ron Tillier, FWS Mentor, Friends of Blackwater NWR



regular basis. It is important to keep in mind that not every Friends organization is ready for a committee structure. Young organizations cannot delegate leadership roles to committees (e.g., mission, goals, expectations, etc.). It is time to establish one or more committees only when specific projects or programs (such as membership or a fundraiser) can be defined (“written charge”) and delegated—and there is an active membership from which to pull volunteers.

■ *The board should be ready to empower the committees with decision-making authority.* No one wants to lead a team and have every decision questioned or criticized by the board. The purpose and expectations of a committee must be clearly defined—and appropriate authority granted—in order for it to make good decisions within the framework of its charter. While committee members are empowered by the board, they are still responsible for meeting board expectations, including providing detailed reports and regularly evaluating progress towards goals.

■ *Committee leaders and members need to be assigned.* Many Friends groups require board members to lead one committee and sit on another. They also expect committee leaders to find their own volunteers to work on the committee, as well as recommend their own replacement if they need to step down. And because this is a collaborative effort, committees must include members from both the Friends and the Refuge as appropriate.

■ *Communications systems must be established between the committee and the board.* Written reports should be provided to board members prior to meetings. This keeps everyone abreast of committee activities and allows for discussion and redirection, as needed. Systematic reporting also holds committee members accountable.

Terrie Temkin offers twenty-six steps regarding how committees function (see <www.nonprofitmgtolutions.com/boardgov.html> for the complete article). Some of the suggestions she makes include:

- Be clear about what is expected of committee members (time, skills, contacts, money).
- Limit committee discussions to topics that fit the organization’s mission, vision, values and priorities.
- Meet only when there is something substantial with which to deal.
- Assign tasks as evenly as possible.
- Solicit then listen to everyone’s input.
- Don’t fight over ownership of an idea.
- Bring conflict into the open.
- Don’t assume that silence means agreement.
- Stay focused on the goals and tasks of the committee.



Meetings

As experts on partnerships have observed many times: good meetings improve the quality of decisions, and promote follow-through. Bad meetings don't.

FWS Mentor Molly Krival has observed: "Friends boards and committees have to learn how to be efficient and productive." Although, she adds, initial enthusiasm will carry meetings to early achievements, sooner or later boards have to organize so that meeting times are closely scheduled for decisions and planning, as well as to ensure everyone can contribute ideas. It is simply not defensible for groups to wander from one thought to another. The agenda, minutes and reports should reach everyone involved before meetings with ample time for adjustments.

Building a sustainable organization depends on well-run, productive meetings. Board members will quickly become frustrated with "wanderlust" meetings that yield few, if any, results. Remember WIIFM ("What's in it for me?")—If volunteers don't feel productive and useful, if they feel they are wasting their time, they will take their energies elsewhere. It's worth investing time as a group to examine meeting culture. While the Board President or Chairperson is responsible for leading meetings, everyone on the board helps set the tone and atmosphere. It is worthwhile to evaluate what is working well and what needs to change.

Following are some considerations for improving meeting productivity and outcomes.

Culture and Expectations

Board members develop a culture that sets the tone and expectations for meetings:

Does the board expect preparation, participation and follow-through by its members? Or does the board set low expectations where late arrivals are acceptable, where discussions may wander and where one or two people are expected to do all the work?

Open a discussion about what expectations are for each meeting. The board should address what it would like to get out of its meetings and ways to improve meeting structure. Outcomes of this discussion might include: beginning and ending each meeting on time; setting and adhering to an agreed upon agenda; and arriving at meetings fully prepared to address agenda items. It is also important to establish a discussion process that ensures everyone has an opportunity to express opinions. Keep in mind, too, that socializing is important, so set aside every third meeting for an enjoyable activity on the refuge (this will help educate and build relationships too). To keep things on track, plan to revisit this discussion from time to time, especially as new members join the board.

Meeting Preparation

Meetings need to begin with good preparation by everyone on the board (not just the President or Chairperson). Prepared members are ready to discuss agenda topics prior to the start of the meeting, making it possible to have an efficient and productive meeting. Following are some steps to help everyone be prepared.



Minutes

Minutes are an important tool to guide a board. Minutes provide history, document decisions and describe actions, timelines and responsibilities. They are references that support the agenda and hold people accountable. Minutes should be succinct for readability; they should clearly document meeting history, including who was present when the meeting took place, and the formal agenda. Minutes should also address the business undertaken, and decisions made, including details of action plans. Ideally, minutes should be prepared and distributed shortly after a meeting (within a week, if possible) so everyone has a record in hand. Minutes should be amended, if needed, and accepted into the record at the next meeting.

Agenda and meeting materials

Prepare and distribute agendas, financial statements and committee reports well in advance of a meeting (at least a week ahead). Early distribution allows time for comment and additions by board members. It also helps board members prepare for a meeting. Board members will have time to read materials, consider their positions and get questions answered in advance of the meeting. This makes it possible to focus meeting time on higher-level discussions, instead of reading or listening to reports.

Agendas should highlight decisions that the board must make and set a time frame for each point of discussion. Agendas should also be linked directly to the group's annual plan. To encourage strategic thinking, experts recommend that most of the agenda focus on the most substantive issues that truly need the input of a group of strategic thinkers. These issues should be closely tied to the organization's goals for the year.

To allow for enough discussion time, place more complicated issues at the top of the list, rather than at the end. Agendas should be followed, under the guidance of the President or Chairperson, but can be adjusted as long as there is a clear process in place for making changes.

Meeting Structure

Focus meetings on leadership issues, such as the mission, vision, goals, planning, actions and evaluation. It is advisable to structure meetings to maximize strategic thinking. This is done by encouraging questions—including rotating an assignment of “devil’s advocate” to a different board member at each meeting. This person’s job is to challenge each idea that is presented by raising questions about risk, or how an idea helps accomplish objectives. Rotating the assignment provides everyone with an opportunity to raise questions without the risk of being labeled as a naysayer. This approach also helps create an atmosphere that embraces critical thinking and fosters a diversity of ideas.

Once committees are established, the board can focus discussions on their accomplishments, rewards and delegation of new projects—and not committee busy work (remember committees are empowered to make decisions) or listening to reports (these should be distributed and read ahead of time). Board members who are concerned about the details can join the committee of interest rather than spend board-meeting time evaluating committee work.



Many specialists in nonprofit partnerships suggest breaking meetings into bite-sized pieces, otherwise participants will feel overwhelmed and possibly lose sense of accomplishing anything. At least part of each agenda should be devoted to giving the group a feeling of being in the know, of having a chance to learn some of the exciting things that are happening in the field—or knowing more about what the organization as a whole is doing.

Here are some additional suggestions for successful meetings (from O’Connell):

- Pay attention to the niceties. Take time to figure out how to make your meetings pleasant.
- Occasionally hold your meeting in a special setting.
- Provide a regular mechanism for board acknowledgement of committee progress. This kind of thoughtfulness makes a big difference to committee members, who inevitably wonder if their efforts are really noticed and really do achieve results.
- Don’t be afraid of healthy controversy in meetings of committees, the board, or voting membership. If the cause is important, people will feel strongly about it but not always the same way. Let people debate and even argue, but keep it within the bounds and context of an organization’s meeting. If the going gets too hot, fall back on Robert’s Rules of Order to help organize the discussion and decision, but don’t let that process take control of healthy exchange.

Robert’s Rules

When an organization is new, members commonly work toward building consensus. Consensus building is useful for creating a mission and vision; but, over time, groups need to use parliamentary procedures for decision making. Always working toward consensus can discourage discussion (especially when individuals disagree and are trying to keep peace) and can stop a board in its tracks when the issue is complex and opinions are divided. An all too common error for nonprofit organizations, specialists note, is that leaders may strive for compromise and for unanimous votes when it might be far healthier to have a split vote—provided all issues are on the table, the debate is fair and there has been sufficient time for consideration.

Robert’s Rules provides the forum for healthy discussion and democratic decision-making necessary for building a sustainable organization. All board members must learn how to use Robert’s Rules effectively and efficiently. The Rules shouldn’t encumber healthy discussion, but must be employed for making clear decisions.

Taking Flight (Heinze-Lacey, Mehaffey, 1997) provides a simple explanation of Roberts Rules. Another tool recommended by Brian O’Connell is *Parliamentary Procedure at a Glance, New Ed.* O. Garfield Jones, Penguin Books, 1990. This book provides an easy to follow outline of the Rules.



The Role of the Refuge Manager and Staff

While Refuge Managers and Liaisons cannot vote or officially advise on Friends business, they play a key role in Friends meetings. They interpret Refuge regulations, identify Refuge needs, communicate about ongoing projects and issues and offer guidance to the Friends about how they can best support the Refuge. Managers provide leadership during meetings and use this time to build relationships, develop rapport and show their commitment to the Friends and the collaboration. Managers also provide direction to Friends, guiding members towards appropriate activities and steering them away from unsuitable projects. Some Managers feel it is important to attend every Friends meeting, others attend many meetings, but delegate a staff liaison to be the key Refuge representative. Either way, this commitment by the Refuge makes for a strong collaborative relationship with the Friends.

Additional Resources

See <www.businessballs.com/meetings.htm> for an excellent article on running meetings by Alan Chapman (1995–2005).

See <www.refugeassociation.org> the NWRA website, for a downloadable PDF version of *Taking Flight*.

Communications Systems

In their 1994 *Collaboration Handbook*, Winer and Ray noted that: “The more people involved, the greater the number of communication bonds; the greater the intensity; and the greater the difficulty of learning about each other, balancing power, having time to speak, scheduling meetings, sending out meeting summaries, creating ownership, being productive, and so on.”

Being able to communicate plans, the status of activities, new opportunities and potential problems is critical to a well-functioning board and a strong partnership. Following are some points to consider for creating effective communications systems.

Timely Communications

It is difficult for board members to be effective if they must wait until the next meeting to review and discuss meeting minutes, new opportunities or problems. Meeting minutes should be distributed shortly after a meeting. This record holds everyone accountable—it is a reminder of action plans and expectations. Telephone and/or e-mail systems need to be established to communicate important new information in between meetings. Waiting until a meeting to provide a long litany of events wastes meeting time and denies board members the opportunity to gather information and consider positions before the meeting occurs.



Share with the Whole Team

Good systems need to be in place to ensure information flows well between all members of the partnership. This doesn't mean everyone must be included in everything, only that each person receives information appropriate to his/her needs. For example, the Board President may have a weekly meeting with the Refuge Manager to check in on the status of plans. Everyone on the board doesn't need an e-mail or phone call to detail these meetings. If new issues are raised, however, these should be communicated to everyone. For other types of communications, such as meeting minutes, newsletters and action plans, everyone in the collaboration must be included. Friends/Refuge partners should discuss communications systems and consider who will be included for what type of information, as well as who is responsible for distributing the materials.

Put it in Writing

All decisions, action plans, activities, meetings and committee reports need to be documented in writing. Documentation should be succinct, noting key points, not a wordy description of everything said in a meeting. If e-mail is used extensively, the Board Secretary needs to keep a paper trail and topics can be archived for future reference.

Use Technology Well

Some Refuges are spread over great distances making it difficult to institute effective communications between partners. In addition, board members may live an hour or more from each other and,

particularly at Refuge Complexes, Refuge managers and staff may be headquartered hours away. In these cases, technology supports immediate communication and should be utilized to its fullest capacity.

The Right Tool for the Task

E-mail and phone conferencing are excellent methods of communication, but to be effective, they need to be well managed. Defining a protocol for use may be helpful and can prevent abuse of these tools. For example e-mail can be used to post factual information on progress toward the meeting the annual plan (financial reports, committee reports, agendas, minutes and updates), but not to post personal issues or concerns. Phone conferences can be used to discuss issues that are inappropriate for e-mail, but conferences must follow a posted agenda to which everyone has provided feedback. Remember that technology supports communication. Technology should not completely replace face-to-face meetings because meetings are so important to relationship development and effective problem solving.

A Group Effort

An important role of the Friends President or Chairperson is to facilitate communication, but it's everyone's job to ensure systems work well. For example, if a board member doesn't receive the minutes, s/he should ask for them in advance to avoid arriving at the meeting unprepared. If minutes aren't being prepared in time, everyone needs to work together to solve the problem (perhaps a new Secretary is in order). To effectively function, board communications must be timely and complete.



Membership Development

Attracting and keeping members is critical to the long-term success of the Friends/Refuge collaboration. Members are the lifeblood of the Friends organization, bringing volunteers, connections, funds and new leaders to the group. Here are some considerations regarding membership development.

Work Together

It cannot be effectively done by the Friends board alone. Because the Refuge is a draw to potential new members, the Refuge Manager and staff are in a unique position to support Friends membership and leadership development. Public interactions with Refuge employees “flavor” their impression. Constituents who have a positive experience will positively view the Refuge and Friends and will want to join partnership efforts.

Take Time to Do it Right

It’s best to start slow and offer a handful of well-run programs and volunteer opportunities than it is to overreach and be ineffective. For each activity, there should be a plan in place that states what is to be accomplished, who is going to do the work, what resources will be needed (and their source) and how outcomes will be assessed.

Have a Recruitment Strategy

Sustainable Friends/Refuge partnerships take an organized, strategic approach to membership. They carefully consider: where to look for new members, what will attract them and what will keep them interested. Most important, perhaps, is this consideration: what benefits will help members decide to move from simply paying dues to becoming active volunteers—and then leaders of the organization. These partners take seriously the principles of “WIIFM” (What’s in it for me?). It is vitally important to offer opportunities and programs that have personal value to members. Successful partnerships incorporate membership development into every aspect of what they do, recognizing that new members bring fresh energy and ideas to both the Friends organization and the partnership.

Develop Sound Systems

Members expect regular communications, such as newsletters, reminders about renewing membership and notices about events. Annual budget planning requires knowledge regarding how many people are members and what to expect for dues each year. An up-to-date database is essential for recruiting volunteers. All of these things require a well-organized, computerized system. To be effective in membership development, plans must include creating and maintaining a solid computerized membership tracking system.



Make it Fun

Many Friends/Refuge partners struggle with membership development. In some remote and rural areas, it can be challenging to find people as potential members because many in the available pool may already be engaged in other activities. In more populated areas, competition can be quite intense, with many other nonprofits vying for members and volunteers. In either case participation in the Friends/Refuge partnership must be demonstrated to be a highly valuable experience. If people enjoy themselves, they'll keep coming back and bring their friends along, too. It's important to realize that membership development is closely tied to everything a partnership does. A well-run, visible partnership that celebrates success and honors its constituents will draw new members regardless of how big or small the community.

Additional Resources

For a thorough discussion on membership development, see: Heinze-Lacey, Beverly. (2000). *Building Your Nest Egg: An Introduction to Raising Funds for National Wildlife Refuge Support Groups*. Washington, DC: NWRA.

Finances

Financial planning and management is a critical function and legal responsibility of the Friends Board. Everyone on the board, not just the Treasurer, must learn to read and interpret financial statements and everyone must participate in planning for the financial stability of the organization. Even young, small organizations that run on a shoestring budget need to follow acceptable accounting practices. It is important to get into the habit of producing a monthly income and expense statement, balance sheet and budget status report. These should go to the board of directors and executive committee in advance of their meetings.

Develop a Strategy

Friends/Refuge partners must work together to set realistic expectations for setting budgets and raising funds. Partners consider what they want to happen for the future, what resources will be needed, where these will be found and then closely tie their budgets to action plans.

“Too much emphasis is being placed by the FWS and Friends on ‘We’ve got to have a visitor center; we’ve got to raise \$1 million.’ Blackwater has been in business since 1987. We didn’t take on a multi-million dollar project in 1989. The visitor center has been the last thing Blackwater has done. It’s important to be realistic—identify what can be accomplished, make it happen and build on the accomplishments.”

Glenn Carowan, Manager, Blackwater NWR



Create a Realistic Plan

It's a myth that volunteer organizations can manage with little money and equally false that a Friends group must raise large sums of money in order to succeed. Among other things, the ability to raise funds is tied to the maturity of a Friends organization (see table below) and setting expectations too high will discourage the partners and lead to board burnout.

Friends organizations with generous budgets tend to be mature organizations (median age 15 years). These groups have a long-established relationship in the community and a track record that makes it possible to raise large amounts of money from a wide variety of sources. The capacity for younger organizations to raise funds is more modest, which must be considered in the planning process. In most of these cases, expensive projects (e.g., capital improvements) are unrealistic in the short run, but with strategic thinking and financial planning, more ambitious goals will become possible in time.

Raising Funds

While FWS employees are not allowed to raise funds by law, Friends fundraising is a partnership effort. The partners must work together to create a compelling case for making donations, as well as to nurture those relationships that lead to donations. Donors need to hear a unified message from the partners and see that the Friends have the support needed by the Refuge's administration to make a project succeed. Donors need to believe they are giving to a worthy cause and that their funds will be well spent. Donors need to feel connected to the cause to which they are making a contribution. The strength of the Friends/Refuge partnership brings credibility to the Friends organization and gives donors a sense of security about making a contribution.

Here is a checklist that offers suggestions on managing funds (from O'Connell):

- Create realistic budgets. It's too easy to get carried away with unduly optimistic income projections and unrealistic expectations.
- Create regular monthly reports and ensure they are accurate.
- Understand the financial picture and the reports. It's better to look silly than not to pursue a part of the financial picture or report that you don't quite understand... the board members are ultimately responsible, and you have to understand it.

Report on Annual Budget/Expenses

FWS Refuge Friends Organization Survey (2006)

Annual Budget/ Expenses	Median Age in Years (Range)	No. of Friends Groups	% of Total Friends Group Respondents
< \$500–5,000	6 (0–28)	48	41%
\$5,001–10,000	8.5 (3–36)	15	13%
\$10,001–50,000	9 (1–38)	32	28%
> \$50,000	15 (1–69)	21	18%
<i>Grand Total</i>		<i>116</i>	<i>100%</i>



- Involve all key leaders in developing the budget.
- Recognize how easily the budget can thwart or contradict the board's decision on priorities. Despite good planning, you may not have enough money for something important.
- Provide a cushion and basic reserves in the budget. Nonprofit agencies should have reserves equal to at least one-half of one year's operating expenses.

Additional Resources

Building Your Nest Egg (Heinze-Lacey, 2000) is a National Wildlife Refuge Association and US Fish and Wildlife Service guide dedicated to Refuge Friends Organization fundraising.

Weathering the Storms—The Resilient Organization

Manage Transitions Well

Change is a constant factor for Friends/Refuge partnerships. Refuge managers and staff retire or move, Board terms end, and life changes can draw people away from the organization. One danger is to depend on one or two dynamic leaders to drive the partnership. When these leaders move on, the Friends/Refuge collaboration suffers and may have difficulty recovering. In sustainable collaborations, members shift the focus from individuals to the organization and build a culture where everyone is responsible for managing and cultivating the partnership.

Each of the partnership stories and profiles featured within this handbook exemplifies embracing change as a tool for growth. Without change, the partnership will stagnate. Without managing change, the partners risk becoming stuck in a state of continual storming. The organizational missions and the collaboration's vision, goals and plans provide the foundation for managing transitions. These guideposts clearly set the expectations, making it possible for new leaders to readily pick up where former leaders left off.

Managing change means using strategic thinking to plan for the future. Sustainable Friends/Refuge collaborations find stability by focusing on the vision of the partnership, consciously nurturing new



leaders and continually improving their systems for developing the organization. As the collaboration's needs and community change, partners must also be ready to "adjust even its fundamental mission, vision and goals to match new conditions or new learning." Mattessich (2003).

Prevent Stagnation

It's not uncommon for a new Friends/Refuge collaboration to experience a period of high enthusiasm and activity and then to hit a point where excitement and participation wane. A period of stagnation may ensue and as long as there is some level of funding and support, this period can last for some time.

Here is a list of some of the characteristics and warning signs of a stagnant organization (from Connolly and Klein):

- Programs are obsolete; demand for programs declines; few new programs are developed
- Focus is on operations; objectives are unmet
- Board members are entrenched, unenthusiastic, minimally involved
- Morale is poor; communications are poor; turf battles crop up
- Focus turns to individual program goals and "fiefdoms" rather than overall mission
- There are few or no new revenue sources
- Systems and procedures are outdated
- Planning is inadequate

Strategic planning, experts advise, is an important tool to prevent stagnation from occurring. Norm Penner, President, Friends of Tualatin River NWR, suggests that his group has learned that having a strategic plan isn't enough—the plan must be evaluated regularly and updated. As partners consider the list above—they should ask themselves if more than four of the above characteristics describe their group. If so, it is possible to correct the situation by going back to the drawing board and applying some of the items listed below.

Here is a list of suggested techniques to deal with the symptoms of stagnation (from Connolly and Klein):

Seek new leadership

The Board should create a profile of qualities needed in new leaders before searching for potential candidates.

Assess and develop programs

Consider the needs of constituents and outcomes desired during the assessment, which will help in designing new programs.

Increase the organization's visibility

Keep constituents informed as goals and programs are revised. Evaluate and improve how information about activities and accomplishments are conveyed.

Evaluate the organization's systems and structure

Consider what skills are needed, what procedures need to change.



Raise funds

Maintain funds for a lack of funds makes it difficult to manage the organization. “The aim of a fund-raising plan when an organization is in trouble should be to capitalize on plans for changes and improvements...”

Improve financial management

Drop non-essential services and develop financial plans to support new programs.

Board Development

Discuss commitment with each Board member and revise the Board structure and processes to reflect needs. Some Board members may resign and others with new skills may need to be recruited. “In times of trouble, governance might not seem an urgent issue. But formal board development can be of immeasurable benefit in the long run.”

Friends/Refuge partners in a stagnating collaboration may find themselves disappointed in and increasingly critical of each other. An important tool for fighting stagnation is to examine the collaboration’s history—to honor and celebrate the successes while acknowledging the need to make changes. Evaluating—and celebrating—history can help nurture the relationship and be a stimulus to move out of a declining stage of development.

Manage Conflict

Many, and perhaps most, people strive to avoid conflict. They perceive it to be a negative in all instances. But there is another perspective about conflict that must be examined: prevention of conflict at all costs limits the ability to change. Thus, instead of avoiding it at all costs, its possibility should be acknowledged and built into the life of the group. Conflict should be expected from time to time; and when it occurs, it should not be avoided but managed.

Being able to effectively manage problems and solve conflicts is a critical step toward building a sustainable collaboration. When board members and Refuge partners build a foundation of trust and respect it helps to create a culture that encourages healthy debate and effective problem solving. As Patrick Lencioni noted in his 2002 book, *The Five Dysfunctions of a Team*: “By building trust, a team makes conflict possible because team members do not hesitate to engage in passionate and sometimes emotional debate, knowing that they will not be punished for saying something that might otherwise be interpreted as destructive or critical.”

The The Guiding Principles for the Friends/FWS relationship (Appendix A) provide a foundation for building trust and respect. Friends/Refuge partners that subscribe to these Principles find they are better able to manage difficult situations without falling into destructive conflicts. When disagreements occur, members are able to trust that choices will be made in



the best interest of the partnership, not based on personal agendas. Below are a few of the typical sources of conflict in a collaboration (from Weiner and Ray):

- Power struggles
- The wrong people
- Low trust
- Vague vision and focus
- Incomplete desired results and strategies
- Lack of clear authority

Another source of conflict in a Friends/Refuge collaboration is that some Friends members don't initially understand how the National Wildlife Refuge System is managed and some Refuge staff do not understand how an independent 501(c)3 nonprofit is managed. It's up to the Refuge manager and staff to guide and educate new Friends members about refuge management issues and it's up to the Friends to educate Refuge staff about how a nonprofit entity is managed. Kelby Ouchley, Manager at Black Bayou Lake NWR, reports spending significant time on education from the time that the Friends of Black Bayou Lake NWR began. Today, Ouchley notes, the Friends have become the educators and "head off incompatible ideas before anyone has a chance to seriously consider them."

A first step to deal with conflict is to acknowledge that a problem exists. The conflict may be masked and difficult to perceive at first. Some people evince disagreement by being quiet. Others simply stop coming to meetings. While it is admittedly difficult to do, someone—the initiator, the convener, a member of the group—must find the courage to ask, "What's going on here?" That simple but essential question is often enough for people to start talking and dealing with conflict.

Once a problem is identified, the group needs a process to come to resolution. A good place to start is to revisit the mission and vision of the Friends/Refuge collaboration—and framing the problem within this reference is a good place to start.

On a final note, O'Connell (1993) offers the following: "Obviously, peacemaking should be the order of the day, but once in a while it's not the best course to follow. Occasionally, it's better that people lose and move out of the mainstream... There are times—not often, to be sure, but there are times—when it's better to let some people fall away or go away mad. This may not seem fair—a contradiction to the kind of spirit that voluntary organizations try to generate, but some people and some controversies are better moved out, so the organization can concentrate on what the clear majority wants to do. Remember that an organization can sustain only so much controversy."



Avoid Personal Agendas

Turf issues and hidden agendas can cause collaborations to fail. Partners have to focus on the results they want, and take active steps to create productive relationships. In such relationships, turf issues and hidden agendas fade away. Instead, everyone's self-interests are out in the open and legitimized. Conflicts can then become the source of honest dialogue among partners in relationship with one another.

One of a Refuge Manager's greatest fears is that one or more leaders of a Friends organization will "use" the organization to push their personal agendas. Personal agendas are incredibly destructive to a collaborative relationship; they cannot and should not be allowed to drive the Friends organization or the partnership.

To prevent personal agendas from entering the Friends/Refuge collaboration, *everyone* must commit to the Guiding Principles (Appendix A) and agree to focus on the collaboration's vision and purpose that set the boundaries for the relationship. Everyone must take responsibility for managing those boundaries, and that includes speaking out when a member is "out of bounds." And it could even mean asking members who cannot honor the relationship and its boundaries to step

down from the board. Ultimately, creating a culture that focuses on the collaboration, not on personal agendas, requires that Friends/Refuge partners take all the steps previously described. They must define the relationship, educate new members, cultivate leaders and set directions. These steps will help build the trust and respect required for a successful collaboration; conversely, neglecting the steps sets the stage for conflict and personal agendas to take hold.

Additional Resources

For an excellent resource on managing conflict see:

Angelica, Marion Peter. (1999). *Resolving Conflict in Nonprofit Organizations*. Saint Paul: Amherst H. Wilder Foundation.

For a variety of excellent web-based articles on organizational development, see: Nonprofit Management Solutions, Inc at <www.nonprofitmgtolutions.com>. □



BLACK BAYOU LAKE NWR

Vision, Trust and Education Spells Success

When Black Bayou Lake NWR was established in 1997, Refuge Manager Kelby Ouchley realized he had a tremendous opportunity to do something new. Unlike the other refuges in the North Louisiana Wildlife Refuge Complex, where traditional public uses focused primarily on hunting and fishing, Black Bayou Lake NWR was close to Monroe, Louisiana, and an ideal place for providing environmental education and interpretation. Kelby saw the potential for a Friends organization to flourish and decided it was time to start a partnership.

Manager Ouchley placed an advertisement in the newspaper inviting the community to attend a meeting to start a Friends organization. The meeting was well attended. Ouchley knew what he wanted and his vision resonated with people in the room. Indeed, Friends President Ann Smith states, “Kelby had vision all over the place!” and this vision has been key to the partners’ success.

In less than a decade, the Friends of Black Bayou Lake NWR evolved from a start-up organization (established 1997) to being named the 2005 Friends Group of the Year by the National Wildlife Refuge Association and the National Fish and Wildlife Foundation. Today there is a strong collaboration between the Friends and the Refuge. Yet, as Manager Ouchley notes, it was a learning process for him as well as the Friends: “It took time for me to understand that the Friends were not a ‘sudden thing.’” Ouchley and Smith offer their advice for creating a sustainable and successful collaboration:

Seek Diversity

Ouchley was at first reluctant to ask “non-traditional constituents” to join a Friends/Refuge collaboration because he feared their goals and interests might be inconsistent with those of the Refuge. However, he recognized that his vision required reaching beyond the traditional supporters and visitors. Ouchley relates: “We hit every single civic club, garden club and organization in town. This recruiting effort gave us a high profile and brought in a lot of people.” As a result, the Friends immediately attracted a wide range of talents that have contributed greatly to their success. Indeed, some of the biggest supporters and leaders are people he never thought of as constituents. Ouchley adds, “many had almost no outdoor experience!”

BLACK BAYOU LAKE AT A GLANCE

The Refuge

- Located in Monroe, Louisiana (Pop. ~150,000)
- Established in 1997 to protect and enhance habitat for endangered species, waterfowl, neo-tropical migrants and resident wildlife.
- 4,500 acres of wetlands associated with a 1,600-acre shallow, cypress-studded lake, riparian areas and reforested farm fields within the watershed.
- Provides excellent habitat for wetland-dependent fish and wildlife, such as waterfowl, wading birds, neo-tropical migrant song birds, reptiles and game fish, including several endangered red cockaded woodpecker clusters.
- Visit <www.fws.gov/northlouisiana/blackbayoulake>

The Friends

Established: 1997
 Membership: 500
 Annual budget/expenses: \$20–30,000
 Visit <www.friendsofblackbayou.org>

Mission

Committed to community stewardship through preservation and restoration of the natural environment as well as increased public awareness, appreciation, education and responsible recreational use.

Accomplishments

- Renovated 1880s planter’s home to be refuge visitor center
- Built and donated Conservation Learning Center to FWS
- Built 400 foot pier, one mile nature trail/boardwalk, photo/bird blind, wetlands art project with trail
- Establish educational programs on and off refuge.

Education and Communication Leads to Trust and Empowerment

Manager Ouchley believes one of his most important jobs in the relationship is to educate. “Most people simply don’t have a good grasp about what refuges are or their specific management goals and objectives. It is important to start the education process early—and then recognize it’s a continuing process.” Ouchley initially focused on the “Wildlife First” mission of refuges and explained about compatibility, refuge objectives and purposes. He also immediately established ground rules: “There will be times I will say ‘no’ to an idea. I am legally responsible to abide by certain rules.” He notes there were initially many instances when the Friends decided something and he had to say, “That isn’t going to happen.” Wisely, Ouchley would not simply veto an idea. He would offer alternatives whenever possible.

Ann Smith reports that Ouchley attended all of their meetings and helped the group figure out how to work as a partner. She says that his involvement has been critical to the organization’s success. “Kelby has led—no, that’s not the best word—Kelby has *guided* us so well. I don’t know that we could do it without his help.”

President Smith notes that not only did Ouchley offer guidance, but Friends members also took responsibility for their own education. Some have attended every Friends conference and workshop and used the resources offered by the National Wildlife Refuge Association to learn about and the federal budget processes that affect refuges. She reports that this education has made it possible to build a trusting relationship. Both partners understand the boundaries within which they work. “Members respect and understand Kelby’s position because they have been taking the time to learn the FWS System.”

Have a Vision and Work on a Significant Project Early On

Smith reports that having a vision of what’s possible has been central to their success. She says that Ouchley was particularly helpful in this area. “His vision was *huge!*”

The Friends of Black Bayou Lake’s first project was to move and renovate a dilapidated 1880’s plantation house. The house was slated to become a visitor center. Smith notes: “The house was a dump. It was rotting, with huge holes in it. Our founding President, economist Bob Eisenstadt, thought it would be smarter, and certainly cheaper, to start from scratch.” But Ouchley saw things differently: “This was something the group could look forward to, show folks in the community—it gave them a purpose, something better than picking up litter.” It was this vision that gave the group its focus for the first four years of its existence. This singular focus helped to build cohesiveness and a great sense of participation and involvement.

Ouchley has seen other Friends groups suffer from a lack meaningful projects and activities. Ultimately, he observed, these collaborations are not satisfying to their Friends group and don’t succeed. At Black Bayou Lake NWR, reaching high has paid off. Ouchley notes. “I never come to work that I’m not surprised at what we’ve accomplished in this small and relatively resource-poor community.”

Realize that Organizations Go Through Stages

The Black Bayou Lakes group’s first “danger point” occurred at the completion of the house renovation project. Absent the focus for their enthusiasm and the community connections it created, the group could easily have felt directionless. Ann Smith emphasizes that it was important for them to realize that organizations go through stages. To avoid the predictable feeling of “let down” that can follow completion of a large project, it has been helpful to have another ongoing project to provide a renewed focus for their energy. “Don’t be afraid to take that next step,” Smith notes, “and change the identity of the group somewhat, to morph into the next incarnation.” > >

Leadership Style is Important

Smith has observed that when the group first started, it needed a leader who could provide direction and take charge. The organization was lucky that its first president, Bob Eisenstadt, had this type of personality and leadership style. As time has passed, the group has not required such specific direction. Instead, the organization now focuses on cultivating new members who will take charge of the organization's expanding roles. She believes her leadership style fits the bill for the group's current "incarnation." She likes to delegate and "gets a kick out of figuring out what people's talents are and giving them things to do, getting capable people involved and keeping them involved."

President Smith says that leaders of mature groups are best advised to let go of some of the control, to share power by delegating and avoiding micromanagement. She likens her leadership approach to her role as a mother and watching her children mature: "You want them to do things on their own and not be dependent on you." This approach has built tremendous strength and stability into the organization. No one person alone is responsible for the organization's survival. Members, even new members, show ownership in the organization, taking on projects with confidence and pride.

Balance Work with Fun

Accomplishing good works is usually not enough to sustain an organization over time. Every project must include sufficient enjoyment so that volunteers donating their talent and labor feel motivated to participate and come back. Smith says, "Tramp around on the refuge; keep reminding yourself and the group that this is a great thing. Don't get bogged down in the business. Having fun is critical...this is 'my' refuge and it makes me feel grounded. I am so lucky—I am so fortunate—to have this Refuge and the Refuge System in my life. It's because I flat love it. It enriches my life." □



Birdwatching at Black Bayou Lake NWR

MARTI SCHUTZ



Key Element 4

Understand FWS Systems & Nonprofit Management



Flicker / JO ANNA GHABBAN

Purple martins at
Parker River NWR,
Massachusetts



It is critical to understand each other's system in order to create a sustainable Friends/Refuge collaboration. Without this understanding, misconceptions and misunderstanding will easily develop. The preceding chapter provides useful information about nonprofit management—this chapter will focus on the National Wildlife Refuge System.

The U.S. Fish and Wildlife Service, a diverse federal agency with numerous programs and several layers of administration, manages the National Wildlife Refuge System. The Service operates under and administers more than 140 laws, as well as many regulations and Executive Orders. Explaining in detail how the FWS functions is beyond the scope of this guide. Friends members are encouraged to spend time discussing issues with their Refuge Managers. The Fish and Wildlife Service and National Wildlife Refuge Association also provide a variety of training courses, workshops and conferences that Friends members will find helpful in understanding the NWRS.

At the most basic level, Friends members must understand that Refuge Managers are the legal guardians of the refuge—they make the final management decisions. When Kelby Ouchley, Manager, Black Bayou Lake NWR, entered into the Friends/Refuge collaboration, he told the Friends board: “There will be times I will say ‘no’ to an idea. I am legally responsible to abide by certain rules.” And FWS Mentor and Refuge Manager, Glenn Carowan, speaks to a “51 percent Refuge/49 percent Friends relationship,” suggesting while there is equity in the relationship, the partners are not *equal*—the “buck” stops with the manager.

It's up to the Friends board to learn everything possible about their local refuge and the System overall. And it's up to the Refuge Manager and staff to provide the education Friends members need to become effective partners.

For a place to begin, FWS Mentor, Molly Krival, offers the following:

- Friends need to upgrade their understanding of the refuge system, FWS including Regional Offices, and the regulations governing how their local staff works.
- Friends need to upgrade their understanding of the ecosystem and wildlife locally and regionally. Master Naturalist training should be encouraged.
- Friends need to learn how to intervene on behalf of refuge funding and regulations, and to become acquainted with their congressional representatives and the federal budget processes that matter to the refuges.



To begin the learning process, Friends members can start with their manager by asking about her/his job and the challenges facing the refuge. For one example, see the profile included in this section: *A Day in the Life of a Refuge Manager*. Another step is to use the example of the Tennessee NWR collaboration where the Friends Board has made education a priority: the partners attend each other's meetings and part of every Friends board meeting is dedicated to learning something about the refuge (See Profile, p. 45).

The Refuge Manager's Job is a Balancing Act

Understanding what it takes to manage a refuge is an important educational step for members of a Friends Board. As nonprofit managers, leaders of Friends organizations are able to act quickly. When partnering with a federal agency, however, they have to recognize that different ground rules apply to agency staff. And as board members, they must be willing and able to temper enthusiasm with considerable patience.

The management challenges and issues affecting each refuge are unique, but one constant across all refuges is that the manager's job is a balancing act. To become better partners, it is vital for Friends organizations to learn as much as they can about their refuge manager, the staff and the job that each performs. Without this understanding Friends members may develop unrealistic expectations or question the decisions being made, which can erode the relationship.

The refuge manager bears overall responsibility for refuge operations and is usually the formal liaison with the Friends Board. As a result, mentors recommend that Friends members talk with their managers to gain insight about the issues affecting the refuge and develop a better understanding of the support role their organization can play.

Frank Drausewski, Acting Manager at Parker River NWR, shared a perspective that helps to illustrate what it's like to manage a very busy northeastern refuge.



Flickr / CHEMIST

Deer at Quivira NWR



Managing a Refuge

Parker River NWR consists of 4,662 acres of diverse upland and wetland habitats including sandy beach and dunes, shrub/thicket, bog, swamp, freshwater marsh, salt marsh and associated creek, river, mud flats and salt panne. These refuge habitats support varied and abundant populations of resident and migratory wildlife including more than 300 species of birds, and many species of mammals, reptiles, amphibians, insects and plants.

The refuge is adjacent to Newburyport (population 17,000), an historic seaport and active tourist destination in northeastern Massachusetts. It is within 40 miles of Boston, and serves a metropolitan population of nearly 2.5 million people

The Refuge records approximately 250,000 visits per year. Primary public uses include wildlife observation and photography, hunting, fishing, shell fishing, environmental education and interpretation. A newly constructed visitor center is helping to make environmental education the primary public use focus for the refuge.

Management Challenges at Parker River NWR

Parker River NWR is relatively small and has diverse habitats, high visitation and proximity to a densely populated area. Because of these factors, the staff and managers at Parker River NWR have a special challenge relative to the management mandates for compatible wildlife-dependent public uses. Management activities are intensely scrutinized by an involved and vocal citizenry—many of whom are only recently gaining an understanding of the purposes and goals of the refuge. There are several special interest groups locally, and many have a positive relationship with the refuge. Nonetheless, each group has publicly disagreed with management at one time or another on specific resource issues. Indeed, one of the pressing management challenges

is balancing the interests and defusing the conflicts that exist between various visitor groups.

Parker River NWR has been the center of a number of protests around management decisions:

- Beach closures—to protect nesting piping plovers
- Deer hunting—to protect habitat destruction by overpopulations of deer
- Spraying mosquitoes—Biological control product use to reduce populations of mosquitoes and their risk of transmitting potentially life-threatening diseases to humans (i.e., Eastern Equine Encephalitis, West Nile Virus)
- Herbicide use—to control invasive species
- Swan and predator controls—to control populations and protect threatened species

In addition, conflicts have occurred between various groups of people vying for access to limited resources: beach users conflicting with surf fishermen (an historic public use) who drive vehicles to access the beach, or bird watchers conflicting with hunters.

Management practices change as scientific data is collected and wildlife patterns and management philosophies change. This has led to disagreements with segments of the public who prefer current practices and with state wildlife agencies that have goals and perspectives that differ from those of the FWS.

The manager is at the center of all these issues, overseeing compatibility assessments and making decisions based on best practices and refuge mandates. The manager must continually maintain contact with visitor groups and the public at large, striving to educate, communicate, and work together to address potential problems. At Parker River this balancing act requires vigilant and ongoing effort.

At the same time, the manager is also responsible for overseeing refuge conservation and restoration activities. This is no small task when resources (staff and money) are limited and invasive species issues are on the rise. This translates to less discretionary funds for maintenance, biology, law enforcement and equipment.

Refuge managers often try to do it all— spreading resources thinly in an effort to meet these broad demands. Today, some managers are even being challenged to select just a *handful* of things that can be accomplished well on their refuges. Many find it difficult indeed to reconcile this challenge with the many pressing needs at their site.

A Week in the Life of a Parker River NWR's Manager

Acting Manager Frank Drausewski offered the following list of things in which he had been engaged in during the few days before the interview:

- Handle personnel issues: the bigger the staff, the more issues there are to deal with
- Provide a program to the elderly
- Visit six area high school guidance offices to provide information on the Youth Conservation Corps Program
- Attend/offer mandatory training
- Work with information technology person to correct some computer problems
- Continue to work off checklist of corrections needed for the new Visitor Center
- Get estimates for correcting electrical problems in the new Visitor Center

- Develop budget proposals for the Regional Office
- Phone conference to determine how to repair the Visitor Center's heating system
- Staff meetings, new employee orientation
- E-mails : these seem never ending. We're driven by e-mail, getting assignments that need immediate responses
- Prepare a report for the state
- Sign off on acquisitions requests; general budget management

Drausewski also oversees a variety of resource management activities on the refuge, including such things as piping plover conservation, invasive species eradication, wetlands reconstruction, deer population surveys, bird surveys, proscribed burns, mowing, water management and a variety of research activities. Managing and educating visitors is another major undertaking and includes law enforcement, outreach programs, environmental education, interpretation and maintenance of visitor facilities.

The interview with Drausewski illustrates well how a refuge manager's job is indeed a "balancing act." The challenges facing refuge managers and staff are often daunting and budget shortfalls make accomplishing goals a difficult task. Becoming well educated about refuge management issues will help Friends leaders become sympathetic to refuge challenges and learn ways to become better and more effective partners. □



Key Element **5**

*Celebrate &
Evaluate*



Near the Tennessee
River NWR, Tennessee

Flicker / COUNTRYBOY1549



This is a short chapter, but the topic of celebration and evaluation is another important aspect of creating a sustainable and successful Friends/Refuge collaboration.

Molly Krival, NWRS Friends Mentor, writes: “Another issue is more serious than it sounds: Friends and staff need to be recognized, achievements celebrated even when they are not directly involved with projects. Applause and various types of thanks/honors should be built-in.”

Healthy sustainable partnerships create a culture of ongoing evaluation, celebration and rewards where partners celebrate their relationship and the individuals as much as the successes themselves.

When evaluation is performed as part of every meeting (the small steps) and as part of a strategic process (every year), it brings energy to the organization because everyone recognizes the progress being made. Ongoing evaluation makes ongoing celebration possible—you don’t have to wait until a major goal is achieved, but can celebrate completing the small steps along the way. Celebration builds trust and tightens the bonds of the relationship. Celebration increases involvement and participation in the partnership because people feel satisfied that they are making a contribution that is noticed, welcomed and valued by others.

Evaluation

Evaluation is a positive and essential experience. Evaluating progress is the only way to know if the collaboration is meeting its goals. Regular evaluation helps partners make course changes, as needed. If something isn’t working as well as expected, ongoing evaluation will help identify the problems before it becomes too late to fix them or resources are wasted. Too often evaluation is left to the end of a project or is not performed at all, and that may lead to burnout and discouragement because partners haven’t recognized their accomplishments.

The following approaches are helpful in performing evaluations (from Winer and Ray):

- View evaluation as reflection. Avoid assuming that the chosen actions are the best or only way to achieve results. Be open to modifying and improving collaborative actions.
- Integrate evaluation into the work. Evaluation needs to be integral to the efforts of the partners.



- Tailor evaluation to the stage of collaboration. Remember that there is not one model or one outcome for a Friends/Refuge to be successful. The results must be measured based on local experience.
- Use quantitative and qualitative evaluation methods.
- Evaluate both the results and the processes being used.
- Appreciate failure. “Be up-front about aborted efforts or fiascoes...see the failure as a learning opportunity.”
- Expect multiple results. Many variables influence outcomes and experiences and members of the collaboration will view outcomes from a variety of different perspectives. These multiple responses to multiple results make it possible to realize success from a variety of different angles and makes for a richer evaluation process.

Molly Krival offers the following questions as practical queries your group could ask to evaluate progress on a project or a committee report:

- Is the predicted timeline working out?
- Have you found the people you need, the skills, the funding?
- Should the board be offering more help to a committee?
- How do you recommend changing the original plan?
- Has the whole project been superseded by an unexpected more important need?

Each partnership should decide how to incorporate evaluation. A one-page checklist could be developed and used to guide discussion as needed.

Perhaps the most important recommendation about evaluation is *don't forget to do it*. Remember that each refuge, each situation each collaboration is unique. An evaluation is a measure of *each* Friends/Refuge collaboration's success in accomplishing locally defined goals. Partners must resist the temptation to gauge outcomes against the successes reported by other Friends/Refuge collaborations.



Evaluating Friends/Refuge Accomplishments

Evaluation doesn't have to be complicated. As Brian O'Connell has observed (1993): "It can be as basic as deciding what you want to achieve by the end of the year and then figuring out later if you got there." Evaluation starts with an attainable goal to be accomplished at a realistic date, with a prior commitment "to stop what you're doing on that date to look back to see if your goal was actually reached."

As members of Friends/Refuge collaborations, NWRS Friends Mentors have experienced their own challenges and successes. NWRS Friends Mentors Tim Armstrong, Friends President, and Mike Blenden, Complex Manager, at San Luis Valley NWRC relay this story:

Armstrong recently found himself lamenting to Manager Blenden that he didn't feel the Friends had accomplished enough since they were formed seven years ago. As they talked, Blenden pointed out achievements Armstrong had forgotten. Together they decided that a simple "accomplishment presentation" was in order. They listed every project the Friends had accomplished and created a chronological Power Point presentation. They were astounded by how much the Friends had done, none of which would have happened had the collaboration not been formed. This realization was both sobering and motivating.

Armstrong and Blenden now show the Power Point presentation on the mentoring visits they make to show fledgling groups what a small, committed group of volunteers can do on rural refuges. They used the presentation to solicit support for a fall 2006 migratory bird festival from their local Chamber of Commerce. They also showed the presentation to members of the entire Friends organization, most of whom had forgotten many of the amazing things they had done.

They plan on updating the San Luis accomplishments presentation at least once a year and providing it to potential board members who are considering joining the organization. Armstrong and Blenden are confident they can recruit new members more easily when people can see they are joining an organization that has a successful track record. □

FRIENDS OF SAN LUIS VALLEY NWRC

Accomplishments

- Provided maps of the Complex for visitors
- Provide refreshments at refuge events
- Staff the Refuge office and Visitor's Center during festivals and the summer months
- Built an interpretive trail and studied the impact of visitor use of the trail on nesting birds
- Sponsor monthly workdays during the summer
- Publish a quarterly newsletter
- Sponsor prizes at the regional Science Fair for conservation-related projects
- Sponsor special field trips for members only
- Host an annual Friends and Neighbors picnic for neighboring landowners
- Maintain a website (www.slvrefuges.org)
- Provide Refuge outreach at local festivals to raise awareness of National Wildlife Refuges
- Sponsor a K-12 Feathered Friends art contest
- Write grants for refuge projects
- Fundraise
- Accept donations at the Refuge
- Lobbied for a \$324,000 Congressional appropriation for operations and maintenance funding for the Baca NWR
- Sponsored debate on a state ballot issue
- Partner with other local conservation groups
- Purchase educational supplies for the Refuge
- Help lead field trips for school groups on the Refuge
- Assist with an annual spring Crane Festival
- Sponsor an annual fall Kid's Crane Festival



Celebration and Rewards

Members of successful Friends/Refuge collaborations consistently put having fun at the top of the list of their keys to success. Having fun is what makes people want to keep coming back for more.

Feeling good about accomplishments gives everyone a sense of personal pride in the organization. Having fun prevents stagnation, smoothes conflicts and nurtures relationships. It's the glue that holds a collaboration together. Here are some tips:

- *Decide what types of rewards and celebrations are important.* As you begin the collaboration, and as new members join, it's worth having a discussion about what rewards are important to each individual, what would make them feel appreciated what would they enjoy doing. Consider how to celebrate not only accomplishments, but how to reward and recognize the individual members of the collaboration as well—the board, volunteers, Refuge staff, the manager. For many people, personal recognition—even a simple “thank you” for a job well done—is the most important token of appreciation one can offer.

- *Integrate celebration into the day-to-day culture of the collaboration.* Don't wait until the end of a project to celebrate. Use action plans and evaluation tools to identify small and large milestones. Each meeting can include time to acknowledge and celebrate the work done by individuals and completion of objectives. Special, more

formal celebrations should be scheduled at regular intervals during the year.

- *Celebrate the partnership not just the accomplishments.* Plan to set aside time on a regular basis to celebrate the relationship itself—a special refuge tour, specially scheduled social time before a meeting, a pot-luck dinner. This helps build trust as the relationships become more personal.

- *Celebration is a way to prevent burnout.* Celebrating maintains enthusiasm and keeps things positive. It makes people feel good. It keeps them interested and they feel valued, rewarded and satisfied with their affiliation with the organization. Having fun brings positive energy to the relationship—energy that will ensure a long-term life for the collaboration.

To conclude, creating a sustainable Friends/Refuge collaboration requires a serious commitment by everyone involved, but it also reaps tremendous rewards. FWS Mentor and Manager of Blackwater NWR, Glenn Carowan, sums up the vision Mentors have for the Friends/Refuge collaborations when he says: “We'd like to see Friends groups rise to their most important level of responsibility: Looking out for the System as a whole—raising the visibility of the System within the country, one community at a time.” □

Putting it all Together— The Sustainable Friends/Refuge Collaboration

Across the country there are a handful of Friends partnerships that exceed regular expectations. Because all refuges and affiliated Friends are unique, there really cannot be a single overall model for a Friends group. However, any Friends/Refuge partners eager to create a sustainable collaboration will benefit from studying the process and accomplishments of the Friends of Blackwater NWR—a highly successful Friends organization located in a rural area.

Ron Tiller, a former Blackwater Friends president and FWS Mentor, says, “It’s a myth that Friends can’t really *do* anything in a rural community. Blackwater NWR is in a rural area. You have to *want* to come to the refuge to find us. The closest ‘city,’ Cambridge (population 11,000), is about 18 miles away and the county has only about 31,000 people in a 558 square mile area.”

A rural location can make it complicated for Friends to build membership and find volunteers. There is a limited population from which to draw helpers, so the same people face multiple demands for their time. It may be challenging to find funds because the same sources sustain multiple requests. How have the Friends of Blackwater NWR overcome these challenges? The answer is that its members and the Refuge management and staff have dedicated themselves to the principles of building a sustainable collaboration.

A Solid Collaboration

The Friends and Refuge have worked hard over many years to build their collaboration. They have created a culture that nurtures and encourages personal, trusting and respectful relationships. Expectations are clear. Good communications systems are in place. And everyone takes responsibility for success of the collaboration.

Ron Tiller emphasizes Friends must feel welcome at the refuge and have a good relationship with the staff. He observes that Manager Glenn Carowan offers leadership by saying to staff: “We’ve got to work with the Friends—give them all the support you can.” The relationship is such that Tiller knew he could call Carowan at home at 9:00 or 10:00 in the evening if there was a need to discuss something—just as he might with any trusted friend.

BLACKWATER AT A GLANCE

The Refuge

- Established in 1933 as a refuge for migratory birds
- Located on the Eastern Shore of Maryland near Cambridge (Pop. ~11,000).
- Over 27,000 acres, mostly rich tidal marsh. Other habitat types include freshwater ponds, mixed evergreen and deciduous forests and small amounts of cropland and managed impoundments that are seasonally flooded for waterfowl use.
- Visit <www.fws.gov/blackwater>

The Friends

Established: 1987
640 memberships: (about 800+ members)
Annual Budget/Expenses: >\$100,000
Visit <www.friendsofblackwater.org>

Mission

To support the purposes of the Blackwater NWR by working for the protection, preservation and enhancement of these precious public lands through advocacy, environmental education and outreach programs.

Accomplishments

- NWRA/NFWF Friends Group of the Year 2003
- Expanded bookstore and gift shop profits
- Took over management of the hunt program
- Implemented a popular educational website
- Funded and installed video cameras on an osprey nest and eagle’s aerie shown in the visitor center and on the website
- Secured grants for: a 20 mile paddling trail through the Refuge; five miles of two new hiking trails; building a new observation floor and library.

Strategic Thinking

Glenn Carowan notes: “People are always amazed that anytime we do anything, we always bring in the Friends first and discuss how the Friends fit—what they can do and how to use Friends resources strategically.” For example, Friends participate along with the staff in Refuge planning retreats, which occur every one to two years. “We don’t look at the weeds...we look at the entire program and what we want to focus on, two or three ideas. We use the Friends for input on what they see—the community pulse. It helps us think about how the community views the Refuge.”

Manager Carowan reports many benefits from including the Friends in refuge planning, including:

- Helps the Refuge more effectively use all of its resources;
- Builds the relationship with the Friends;
- Generates new ideas from the community; and
- Builds consensus up front, rather than after the fact,

This has been critical to the Friends success. Tiller observes that “Glenn Carowan includes the Friends at strategic planning sessions as part of the ‘staff.’ He makes us feel *part* of the Refuge organization—a part of everything they do. We wouldn’t be anywhere near where we are today if we were treated as the ‘stepchildren.’”

A Well-Managed Organization

In its 20+ year history, the Friends of Blackwater have been through four developmental stages:

1. The first stage focused on getting board members—they spent time volunteering and becoming known in the community.
2. In the next stage, the Friends tackled their first project: they launched a small bookstore and hired its part-time staff. The Friends at first thought they were making money from the store. In reality it was losing money—sales grossed about \$3,000, but

all proceeds went to pay the bookstore manager. After assessing the situation, the board decided to keep the store, but make substantial changes. A board member volunteered to dedicate the countless hours it required to improve the store and make it profitable. Today, the store annually grosses over \$100,000.

3. In 1999, twelve years after the Friends inception, the board reorganized and moved to a committee structure. This revision was a key element in the advancement of the organization. Tiller notes: “I firmly believe that the way the board is structured is critical to how the group works. We used to have meetings that were 3 to 3 ½ hours long—everyone got into everyone else’s business and chewed up ideas. Now, if you want to be on the board, you have to donate \$1,000 in cash or in-kind, chair one committee and participate in another. When we made this change, we lost four board members, but the board members we have now are serious. We have good control over our meetings, which run about one hour and focus on committee reports. If someone says ‘I have a better idea’ they are asked to join the committee.”

In addition to improving board function, the committee structure has helped build in a system to generate new members and leaders. Committee chairs are responsible to recruit volunteers for their committees and find replacements for themselves when they are ready to step down. This system makes everyone responsible for ensuring the overall future of the board and organization.

4. The committee structure has now enabled the Friends to focus successfully on multiple projects. Education and outreach are high priorities. The Friends have built an educational building, ornithological library and observatory. They are reaching out more to the community and working with the school system. They have developed extensive resources available for educators.

As an aside, Manager Carowan comments that too much emphasis is being placed by the FWS and Friends on “We’ve got to have a visitor center. We’ve got to raise \$1 million.” >>

He reminds us “Blackwater has been in business since 1987. We didn’t take on a multi-million dollar project in 1989. The visitor center has been the last thing Blackwater has tackled. It’s important to be realistic—identify what can be accomplished, make it happen and build on the accomplishments.”

While the Blackwater experience offers invaluable insights about the evolution of collaboration, remember that each partnership is unique. The accomplishments of each collaboration must be measured against its set of vision and goals, not the successes of another group. Indeed, Tim Armstrong, FWS Mentor, Friends of San Luis Valley NWRs, says it well:

“We have to be careful about setting up expectations that every Friends group needs to be like the handful of big, highly successful groups in the country. The majority of Friends are relatively small and many will never be raising lots of money or members. They need to define success based on their own measures... While it’s important for Board members to understand and meet their roles and responsibilities, it’s also important, especially for small groups, to realize it’s okay to stay in the early stage of board development. That’s fine if you have enthusiasm and some change over—you don’t need to have a big institutional board.”

It is quite acceptable for a collaboration to remain rather small —provided it keeps moving forward. The Blackwater partnership enjoys a twenty-plus year history, and its greatest successes have occurred over the last seven or eight years. Most Refuge Friends groups are very young and have much to learn. Perhaps the most important lesson is what has remained true throughout the Blackwater collaboration’s life cycle: there must be strength in the relationship and everyone must subscribe to a clear vision. These are things that sustain any Friends/Refuge collaboration and lead to a future filled with success.

When Glenn Carowan was asked what he thought was the greatest success for the Friends/Refuge collaboration at Blackwater, he responded:

“The greatest contribution Friends of Blackwater NWR has made is how they have integrated the Refuge into the community and the community into the Refuge. We send the wrong message when we say ‘the Friends role is to raise money.’ This is not the most important role of Friends. Integrating the Refuge with the community is what it’s all about. If we’re not doing that, we as a System, fail.” □



Resources



FLOCKER / HEATHZIB

Lily pads at Ottawa NWR,
Ohio



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Appendices

*A: Guiding Principles for the Friends/
FWS Relationship*

B: Best Practices for an Accountable Organization

C: Decision-Making Process Steps

D: Finding People to Help



FLICKR / FRANK PETERS

**Butterfly at Noxubee
NWR, Mississippi**



Appendix A: Guiding Principles for the Friends/FWS Relationship

What follows is the list of expectations for the relationship between the U.S. Fish and Wildlife Service (FWS) and Friends groups developed at the culmination of the 1997 meeting in Virginia. It was signed by everyone present as a statement of principles.

We commit to abide by the following expectations that we hold for one another in the Friends-FWS relationship.

Expectations that the Friends hold for themselves in the relationship:

- That we will consistently and regularly communicate honestly and strongly.
- That we will work to protect the natural resource.
- That we will respect the concerns that the FWS has regarding the relationship, i.e., that we will have reasonable expectations of them and what they can do.
- That we will be committed to the refuge mission, which means that we must know what the mission is and so we will educate ourselves.
- That we will be fully committed to keeping up our end of the partnership.
- That we will not undercut agency and refuge management, that the “dirty linens” will not be aired in public.
- That we will agree to always discuss differences of opinion in a professional and respectful manner.

- That we will buy into a shared vision, that means a vision that both sides work to create.
- That we will help the Service personnel to be and feel productive.

Expectations that the Friends hold for the FWS relationship:

- “That they will put their money where their mouths are.” Commit to training, to mentoring and to providing the resources that are needed. That the FWS will commit to doing what needs to be done to help make the Friends group effort succeed: it is not just the money.
- That they are making a long-term commitment to this effort, that the non-profit organizations are here to stay. That the commitment is consistent among refuge managers (both serially over time and at each refuge and across all refuges) and throughout the FWS.
- That they will have a true sense of partnership, wherein there will be a “no surprises” philosophy and a full sharing of information in both directions.
- That the Friends efforts will have the support of the whole FWS, and especially including the managers. The managers are essential but it needs to permeate the whole agency.
- That they will trust and respect us.
- That they will work to protect the natural resource.

Expectations that the FWS holds for themselves in the relationship:

- View the Friends groups as a long-term, personal friendship. This implies dealing with them honestly, trusting and respecting them, appreciating them, being patient with them, not being negative about them, and using the full set of talents.
- We will work to sell it to our peers and to the troops. We will work to infuse support for Friends throughout the agency.
- Providing consistent follow-through and active support of Friends groups from the Washington office, the regional offices, and the field.
- We understand what it takes to have a Friends group and then make the commitment.
- That we will help you help us. We will teach you about the government systems to make your job easier. We will give Friends the information that needed to do their job and to give them the information before they read it in the media.
- That we will help the Friends to be and feel productive.

Expectations that the FWS holds for the Friends in the relationship:

- To protect the resource.
- To be independent advocates. That they will learn how to work effectively with and within governmental systems. That they will be advocates for the good of the system at the local and national level. That they might help to raise support to benefit the refugees.
- That they will respect and trust the Service employees.
- That we will agree to always discuss differences of opinion in a professional and respectful manner.
- That they will understand and respect the operational pressures and boundaries that affect the Service (Give the Service the room they need to make management decisions.)
- To provide a positive community influence. Be the FWS' doorway to the public.
- To assist in accomplishing refuge projects. The Service's resources are limited and sometimes need help to finish a project. □



Appendix B: Rocky Mountain Nature Assn.— Best Practices as an Accountable Organization

(Adapted from the Association of Fund Raising Professionals, 1995, and the Accountability and Nonprofit Organizations program at the Mandel Center for Nonprofit Organizations, 1995) The statement above and the accountability measures for positions that follow were compiled by C.W. Buchholtz, January 2006.

The Rocky Mountain Nature Association holds a public trust to improve the quality of parks, forests, and other public lands. As an accountable organization it clearly states its mission: The Rocky Mountain Nature Association promotes the understanding of Rocky Mountain National Park and similar public lands through interpretive or educational publications and programs; advances stewardship through philanthropy for Rocky Mountain National Park and similar public lands; protects, restores, maintains and preserves land and historic sites in Rocky Mountain National Park and elsewhere in the Rocky Mountain region; and may, in furtherance of such mission, conduct any lawful activity.

As an accountable organization it articulates the needs of public agencies as well as visitors, explains how parks and forests are of public benefit, and provides cost-effective programs.

The Nature Association freely and accurately shares information about its governance, finances and operations. It is open and inclusive in its procedures, processes and programs consistent with its mission and purpose.

The Nature Association is accountable to all those it expects to serve, to all those who support it, and to society.

As a nonprofit organization, it is responsible for mission fulfillment, leadership on behalf of the public interest in parks and forests, stewardship, and quality.

- Regarding mission fulfillment, the Nature Association 1) establishes a vision for the future and pursues its accomplishment; 2) is doing what it says it will do; and 3) maintains its relevance by meeting needs within an environment of change.
- Regarding leadership on behalf of the public interest in parks and forests, the Nature Association 1) enhances the well-being of public lands and public land users; 2) promotes inclusiveness and diversity; 3) educates the public, other nonprofit organizations, governmental agencies, and Congress, including appropriate advocacy and lobbying.
- Regarding stewardship, the Nature Association 1) maintains effective governance and management; 2) generates adequate financial resources; 3) manages time, talent, and funds effectively; 4) supports and recognizes volunteers; and 5) appropriately compensates staff.
- Regarding quality, the Nature Association 1) strives for and achieves excellence in all aspects of the organization; and 2) evaluates the total organization and its outcomes on an ongoing annual basis.



Ways to Measure Best Practices and Excellence

For a Board Member

- Is the organization solvent and experiencing controlled growth?
- Are relationships with partners positive and improving?
- Are the goals, projects and activities of the organization in line with its mission, policies and capacity?
- Is board meeting attendance and committee participation high (are board members contributing to the organization in time and funds)?
- Is discussion effective, positive and respectful of others?

For an Executive Director

- Is the organization financially solvent, experiencing growth or suffering a decline?
- Is the staff productive, supportive, cooperative and as happy as possible?
- Is the governance of the organization in good working order, including the Board of Directors? Are the organization's official documents available and in order?
- Are cooperative relationships with agencies and partners positive or negative?
- Is the organization as a whole productive and accountable, or declining or secretive?

For a General Manager

- Does the General Manager ensure adequate operating funds and bank account levels are maintained, while managing surplus funds in a responsible manner that results in the greatest earnings within an acceptable level of risk?
- Is there assistance in hiring the best individuals available for staff positions, while guiding and nurturing staff members to maximize productivity? Does the General Manager facilitate training, communication and mentoring to achieve employee enthusiasm and retention?
- Are management actions and policies communicated effectively?
- Are the financial records of the organization transparent and easily explained and available for public review, with all reports and audits completed by their required dates?
- Are thorough analyses of costs and benefits performed regarding organizational expenditures, and are the fundamentals of business planning used in developing long-term strategies?

For an Office Manager

- Are payments made promptly and properly to vendors, employees and governmental agencies?
- Are financial records in excellent order and available at all times, fully documented for audit purposes?
- Are supplies, equipment, and other resources procured in a timely and cost-effective manner?
- Is communication effective and timely with anyone requiring assistance or information?



For a Membership Manager

- Does the membership program complement the goals of the organization?
- Is there a business or strategic plan for the membership program? And is it being updated regularly?
- Are new members being sought with creative and changing methodology, with a goal of increasing membership annually?
- Are communications or correspondence provided for members in a timely and professional manner?
- Is the renewal rate of membership above the national average of 70%? Or is membership in the organization declining?

For a Seminar Coordinator

- Does the field seminar program offer the highest quality seminars and instructors, presenting topics intended to enhance the understanding of our public lands?
- Does each seminar provide people with accurate information on subjects relating to natural and cultural history?
- Are seminar participants pleased with their educational experiences? Do they advertise the program to others?
- Does the seminar program produce sufficient revenue to break even financially?
- Is marketing and promotion of the seminar program sufficient to ensure that seminars are filled to capacity and none are cancelled for lack of enrollment?

For an Inventory Specialist

- Is the warehouse neat and operated in a business-like manner, permitting the efficient receiving, storage, and processing of merchandise?
- Are incoming orders, phone calls, and e-mails handled efficiently and processed in a timely and professional manner?
- Are internet orders and inter-organizational transfers processed and shipped within 24 hours?
- Are the commerce pages of the organization's website accurate and up to date?
- Is communication with the public effective and is a spirit of team work and cooperation evident within this office?

For an Administration Assistant

- Are donor records held confidential and updated accurately and is the data base program used for analysis and philanthropic support to its full potential?
- Are financial records for donated funds and endowments accurate, efficiently managed and communicated to the Board of Directors?
- Are project payments made in a timely manner and expense accounts kept up to date, with organization and agency balances properly reported?
- Is communication open and frequent with the main accounting office in all financial matters relating to donated funds, aid, endowments, and investments?
- Are data base problems, special projects, and complex assignments accomplished efficiently and successfully?



For an Inventory Manager

- Are sales outlets as well as retail and wholesale customers receiving the highest level of customer service?
- Are inventory levels appropriately maintained throughout the organization while staying within the purchasing budget guidelines?
- Are vendor relationships positive, allowing for the negotiation of favorable deals for the organization?
- Is communication being conducted in a positive and effective manner with fellow employees and partners?
- Is the inventory management office adapting new techniques and technology, when appropriate, to be more productive and accountable?

For a Sales and Merchandising Manager

- Are sales outlets examined and reorganized as necessary on a regular basis (with outside outlets visited at least twice a year and local stores at least weekly) to ensure inventory is optimal and operations are running smoothly?
- Are 20% of all retail items newly-selected each year and well suited to the marketplace, serving both an educational mission and appealing to visitors?
- Are slow selling products identified and either transferred other retail outlets or discounted, working to minimize financial risk or loss to the organization?

- Are communications with agency liaisons and visitor center managers professional, cordial, and productive, specifically regarding product approval, merchandising strategies and sales procedures?
- Are sales personnel—including agency employees or nonprofit staff—kept well informed about merchandising initiatives or strategies, as well as new products and any retail changes?

For a Special Projects Manager

- Are special projects managed creatively, efficiently, and cost-effectively?
- Do in-house publishing and product development projects reflect well upon the organization and are such projects produced in a timely fashion?
- Is the organization's newsletter produced on schedule, with accuracy, within budget and is it appealing to donors and members?
- Are relationships with members, donors, Board, staff and volunteers positive as a result of special projects?
- Is the fellowship program marketed to attract the best applicants? Are the logistical requirements of the fellowship program properly facilitated each year?



For a Publications Manager

- Is the organization producing high-quality publications and products at a reasonable cost?
- Are the organization's publications or products addressing the needs within the marketplace of park and forest visitors and are they profitable?
- Do publications and products of the organization match and enhance its interpretative and educational mission?
- Is the organization's publications department establishing a positive cooperative relationship with agencies and partners?
- Have the publications and products of the organization earned a reputation for quality, accuracy, attractiveness and value? Have any merited awards?

For Sales Clerks

- Is there a thorough familiarity with the inventory at the sales site so that the best recommendations are made to visitors based on their interests and needs?
- Are the organization's activities and programs, as well as the public land partner, represented knowledgeably and positively? Are visitors encouraged to become involved with the organization; do they leave with a positive impression of the organization and affiliated public agency?
- Are visitors made to feel welcome and are questions answered as patiently, kindly and thoroughly as possible? Are visitors referred to agency staff when appropriate?
- Is the sales area kept neat and clean? Does it reflect pride in one's work, the organization, and the agency?
- Is communication open with fellow staff so that, if necessary, they willingly provide assistance regarding inventory, merchandising and related needs?

Appendix C: Decision-Making Process Steps

There are many approaches groups can take to make decisions. Friends mentors use the process below, using a full day to assist Friends/FWS collaborators to work through steps 1–7. The Friends/FWS partners then conduct a number of follow-up meetings to develop a strategy for #8 and revisit actions, progress and outcomes at each meeting thereafter.

1. Ask a concrete question

Examples: In three years, how do we want our community (the public) to be interacting with the Refuge (and vice versa)? In the next six months, what do we want to accomplish?

2. Write down ideas

Everyone works individually. Each person writes down *one* idea per page.

3. Post ideas on a wall

This allows everyone to view the ideas, but no evaluation of ideas is done at this time.

4. Review and clarify each idea

The goal is to make sure all ideas are understood as presented, but no evaluation is done at this time.

5. Categorize

Put like ideas together and topic headings as appropriate.

6. Prioritize by voting

Decide how many votes each person gets. Each person places a mark or sticks a dot on their favorite ideas.

7. Discuss the popular ideas

This is the point where evaluation begins. Consider how feasible each idea is (what are the resources available, what resources are needed) as well as how important each idea is to the collaboration and its success.

8. Select the best ideas

The best ideas are those that will further the organizations goals.

9. Decide on an action plan, implement it, and review and evaluate regularly

The decisions made should be recorded (retaining all ideas generated). An action plan should put in writing, assigning tasks and time-frame for completion. This action plan should become the focus of Board meetings. “Creative ideas” that arise during the year should be considered in reference to the action plan (i.e., Does this new idea help us accomplish our plan?).



Appendix D: Finding People to Help

It goes without saying that a successful, sustainable organization made up of volunteers means that bodies (and minds) are needed. But how do you find people to help? People of diverse interests, expertise and personality will round out a Friends group. Below is an exercise that uses an Acquaintance Map, a useful tool for zeroing in on potential volunteers.

by Molly Krival

1. Bring together all board members and as many staff as possible.
 2. Place the *Acquaintance Map* where everyone can see it (see map on next page).
 3. Provide everyone with 20 or more 3 x 5 index cards.
 4. Using the Acquaintance Map as a stimulus to memory, everyone writes on a card the name of someone they know and why that person might make a good board or committee member, like interests or expertise. Use a different card for each person to be considered.
 5. When everyone is done, collect the cards.
 6. One person reads aloud each card and asks everyone if they know this person and, if they do, what can they add—positive or negative—about them. Another person records what is said.
 7. When that process is complete, sort the names into groups: likely candidates, maybe or not likely.
 8. Invite the likely group, and perhaps the “maybes” to a guided tour of the refuge followed by food and drink.
 9. All board and staff should make a point of meeting them.
 10. A short program on the refuge and the activities of the Friends should be included.
 11. After this, hold a meeting of the board and any interested staff to discuss impressions.
 12. Board then decides who to ask to be nominated for the board or to become a committee member. (See “How to Ask,” p. 106)
- Boards often ask how to decide if someone is a good candidate. It varies so much. A staff member offered his right and left guards on a hockey team because they’d do anything for him. Sometimes it’s a volunteer who loves the refuge and is willing to help do other things. Sometimes it’s a highly charged person who is on other boards and is known for accomplishments. Sometimes it’s someone who wants a place to do something worthwhile. A person who likes you. A person who likes the refuge. One who loves kids, likes to help out, has just retired, took a Master’s Naturalist course. Someone who bakes or is good with a computer. Someone who’ll make your board/committee more diverse. A banker. An accountant. A parliamentarian. A member of other environmental organizations. Someone looking for a new interest. A good-hearted person.

Acquaintance Map

Many times, we go through the day compartmentalizing our roles. We have friends and acquaintances that are a part of our family lives, others that are a part of our work lives, yet others that are a part of our recreational lives, and so on. When it comes to involving people in our community it

is important to break down the walls by which we segregate these people. Only by working together with everyone can we build the optimum community.

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How to Ask a Nominee to Consider a Board Appointment

By Molly Krival

- The President and another director meet the candidate by appointment after the board has approved the selection.
- They have clear, detailed information on what role the candidate is being asked to take, including the typical time commitment.
- They say why the board is asking this person to become a director: skills, reputation, commitment to the refuge, etc.
- They double check that the person has all the qualifications: membership, skills, time, interest, and commitment to refuge.
- They are prepared to discuss what will be needed if qualifications are not complete:
 - Become a member,
 - Training, orientation, mentor-intern relationship
- If all is well, they provide the new director with a schedule of the year's meetings, explain when they will be expected to attend, and offer to take them to the first meeting. If appropriate, introduce the new director to a board member who will serve as their mentor until they are familiar with the board's routine.
- At the first meeting, introduce them to everyone and provide them with a list of directors, a handbook with by-laws, recent minutes, etc.
- On the way home, answer questions they may have. □

U.S. Fish and Wildlife Service
National Wildlife Refuge System
www.fws.gov/refuges

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