

# River Voices



## Strategic Planning for our Rivers' Sake

*How planning can make your work more effective*

by Katie Burdick

**S**trategic planning is the “process of determining what an organization intends to be in the future and how it intends to get there.” Strategic planning as a process has the real ability to achieve important and sustainable outcomes for any group, whatever its size or stage of development. From the ‘start-up’ group just beginning to coalesce to the mega-budget group with so many employees that no one knows everyone ... all can directly benefit from the discipline and invigoration of a strategic planning process. I say this based on more than 20 years of consulting with environmental groups around the country.

For groups that focus their efforts on preserving and restoring rivers and watersheds, the act of strategic planning is particularly important. As the competition for scarce funding dollars accelerates, the ability to both attract, and efficiently spend, is increasingly attached to programs and organizations that are both effective and outcome oriented. Many foundations and large donors are

beginning to require the presence of a dynamic and functional strategic plan before they will consider funding. In addition, in this time of scarce resources we are morally obligated to act as we talk—yet, if we treated the environment the same way we treat our

Wilder Foundation, the positive outcomes of strategic planning can include:

- Improved performance
- Stimulated forward thinking and clarity on future direction
- Organizational problems solved
- Survival with less resources
- Increased teamwork and expertise
- Influence rather than be influenced
- Improved ability to meet other requirements

*“Would you tell me please, which way I ought to go from here?” asked Alice in Lewis Carroll’s Alice In Wonderland. “That depends a good deal on where you want to get to,” the Cheshire Cat answered.*

organizations, we would have clearcutting and sedimentation at record levels. If we are to preach sustainability, then we must model it; and planning strategically for our programs and our organizations is definitely in line with sustainable thinking and action.

As identified by the bible of strategic planning, the *Strategic Planning Workbook for Nonprofit Organizations* by the Amherst H.

Make no mistake about it. We are in this to accomplish goals and achieve visions, but if we cannot convince people of the value of our vision we will not be able to achieve the momentum to accomplish our goals. Groups build momentum by getting other people and groups of people to join their efforts by giving time, energy, money, and support. Attaining clarity on the program you offer and the ways you will structure yourselves to achieve your vision is a form of marketing. So—like it or not—you are in business, and a

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*Editors:* Rita Haberman, Kathleen Krushas

*Editorial Assistance:* Doug Ricker

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River Network  
P.O. Box 8787  
Portland, Oregon 97207  
(503) 241-3506  
Fax: (503) 241-9256  
rivernet@igc.apc.org  
<http://www.rivernetwork.org/~rivernet>

Eastern Office  
4000 Albemarle St. NW, Suite 303  
Washington, D.C. 20016  
(202) 364-2550  
Fax: (202) 364-2520  
rivernet2@aol.com

**River Network is a national nonprofit organization whose mission is to help people organize to protect and restore rivers and watersheds.**

**W**e support river and watershed advocates at the local, state and regional levels, help them build effective organizations, and promote our working together to build a nationwide movement for rivers and watersheds. River Network also acquires and conserves riverlands that are critical to the services that rivers perform for human communities: drinking water supply, floodplain management, fish and wildlife habitat, recreation and open space.

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# From the President

You've probably heard the story about the fellow who was strolling along the sidewalk one evening when he encountered another fellow on his hands and knees under a streetlamp, searching for something. "What are you looking for?" "My keys." After half an hour of intensive search, Fellow 1 asks Fellow 2, "Are you sure you lost them here?" Says Fellow 2, "No, I lost them down there, in the middle of the block." "Then why are you looking here?" "Because the light is better here."

Strategic planning is a way of being sure that we're not just looking under the streetlamp — that we're taking appropriate steps to accomplish what we really want to accomplish. It's also a way to build a team, to get your partners invested in your program.

At River Network, we feel that strategic planning has been a real source of strength. It gave us our long-range plan, *Watershed 2000*, which has been a "north star" for our day-to-day operations. It has also been a tremendous help in fundraising, board recruitment and other areas.

Seven years ago, River Network put out the first issue of *River Voices*, edited by our new intern, Rita Haberman, fresh from the University of Michigan. Besides producing *River Voices*, Rita has been the voice on River Network's 1-800 "hot line" for grassroots activists. Any of you who have called for assistance know Rita as a helpful, imaginative "friend in need" who is dedicated to giving whatever assistance is needed. For most of our grassroots Partners, Rita is River Network.

Next month, Rita will be leaving River Network to work with the Willamette Riverkeeper, an Oregon group that she has assisted on behalf of River Network. Rita felt the need to practice what River Network preaches, and to take on the restoration of the great river in her own backyard.

As much as we will miss Rita, we believe in what she is doing. Grassroots work on behalf of rivers truly is the highest calling to which we can aspire. Our promise to Rita is that whenever she and the Riverkeeper need assistance, all she needs to do is call River Network.

Sincerely,



Phillip Wallin  
President



© photo by Linda Kilewer

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*Front row (left to right, seated):* Sue Doroff, Rita Haberman, Wendy Wilson, Pat Munoz, Tim Palmer, Phil Wallin, Michael Fife, and Ken Margolis.

*Second row (standing):* Don Elder, Nancy Harris-Campbell, Maureen O'Neill, Liz Raisbeck, Eben Hobbins, Lindy Walsh, Kathy Luscher, Jean Hamilla, David Wilkins, Mason Browne, and Jim Compton.

*Not pictured:* Gilbert Butler, Richard Donahue, Peter Kirsch, Dan Valens, and Rebecca Wodder.

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At River  
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### Strategic Planning for our Rivers' Sake

*continued from page 1*

business must plan for its future or it will not have one.

Notwithstanding the previous list, I am not blind to other outcomes that such a process can generate. In consultations with countless groups I have seen strategic planning enable groups to blossom by resolving difficult organizational dilemmas, reinventing fundraising or programmatic strategies, building strong relationships, and even rising from the ashes of near-dissolution as a result of a strategic planning process. On the other hand, I have also witnessed the process approached as a panacea; a last ditch effort to avert catastrophe; a backdoor method to oust board or staff members; an avoidance technique, an unconscious method to breakup a group; and a variety of other less positive things. So what is it about this process that leads to such different outcomes?

One theory is strategic planning is much like the progression of therapy—denial, anger, grief, acceptance, transformation—with the potential to become 'stuck' at any of the steps. The risk of sabotage is magnified in proportion to the number of people participating in the process. Another theory says that the issue of "who has the power" is the cause for the various outcomes of the process. Some perceive strategic planning as an art form and believe that some folks got it and some do not. Others feel that the ability to make reasonable assumptions and sustain good group dynamics varies widely from group to group.

In some respects my six-year-old niece said it best when she told me this little joke "Auntie, how many psychiatrists does it take to change a light bulb?" I don't know Emily, how many? "Only one, but the light bulb really has to WANT to change." That is the heart of strategic planning. If the leaders have no real intent of implementing the

results, or if the group is entering into the process with cynicism, or if the group is avoiding 'life threatening' issues by beginning to plan, then the outcomes may disappoint and discourage. On the other hand, if the group genuinely wants to know where to go and how to get there, strategic planning may be very worthwhile.

*In order to really be alive a plan must be flexible. Without creativity, insight and imagination a plan is dreary, uninspired and ultimately a failure.*

#### Planning Myths

There are several myths that accompany strategic planning efforts:

- Strategic planning is synonymous with corporate or military planning.
- Long-range planning results in rigidity, such as blind adherence to a blueprint.
- Planning is all logic without intuition or creativity.
- Planning is too complicated and a waste of time.
- Being accountable will only cause problems and assumes we do not know what we are doing.
- Planning means having to give something up (planning means setting priorities, and the priorities set by the group may leave out MY issue).

These myths serve to feed our resistance to planning. Yet, planning is a

tool with no intrinsic moral value. In order to really be alive a plan must be flexible. Without creativity, insight and imagination a plan is dreary, uninspired and ultimately a failure. Planning calls for preparation but is not beyond the intellectual capabilities of our groups. If planning takes "too much time" it is because we have come to value activity over reflection, no matter how frenzied or ineffective. We can take the short-term response to a long-term problem when we refuse to plan, but this is much like clearcutting and leaves us with no shade, soil or moisture to grow in. And when we refuse to become accountable we doom ourselves to a cycle of failure, excuses—and worse— isolation.

By believing the myths about planning we only enable ourselves to avoid the discipline, not the consequences. By not planning for the future we will get somewhere, but it may bear no relationship to where we meant to go.

#### Process and Contents

So, with this all in mind, the basic process and contents of a strategic plan are the next point of consideration.

#### Process

For those of you who have never prepared a plan—and to refresh those of you who have—strategic planning includes five basic steps, as identified by the Amherst Foundation workbook:

1. Get Organized
2. Take Stock (Situational Analysis)
3. Develop a Strategy
4. Draft and Refine the Plan
5. Implement the Plan

The sidebar on page 5 presents additional information on these basic steps, again taken directly from the Workbook. The Workbook is such an

excellent source of knowledge on this topic that I refer you to it directly—I could write all day and all I would be doing is paraphrasing the contents. It is short, to the point, easy to read, and full of specific worksheets to get you through all stages of the process.

The most important elements of the process are developing a clear and honest assessment of the opportunities and threats that face your group, and orienting your program to the actual situation.

The situational analysis should be a honest and informed look at your actual situation—do not limit your input to the same old group. This is an opportunity to reach out to people outside your group and people who have been in the group before; to people who are stakeholders from other groups, and people who know the barriers from the inside. If you do nothing else, be sure to involve people from outside of your board and staff in this critical process. You need to challenge your thinking, not preach to the converted.

When it comes to thinking through your program, the value of this assessment of opportunities and constraints will become apparent. If your program is the way it is because it has always been *your* program; or because one or two dominant individuals have a vision they will not relinquish, or because you are not really sure what to do, then take the time to really assess what the basis for your program actually is. Be honest. All you have to lose is an ineffective program. The planning process should make you assess whether your program actually fits your goals. This discipline is healthy, if sometimes painful. I have never worked with a group that has not benefited from the exercise of challenging their thinking about program.

Another element of the process is the decision of whether to use a facilitator. One advantage of having a

facilitator is that it enables all of the board, staff, and assembled thinkers to participate fully. Another advantage is that a facilitator can frequently unlock and steer through the barriers that the individuals or group dynamics may create.

Facilitators can be found through a myriad of sources (see page 13). The key here is that by designing a creative but purposeful agenda an objective third party can frequently assist a group in reaching the end in a quick and coherent way. The major disadvantage of a facilitator is usually the cost. Although there are groups, such as foundations, that will fund such folks, they often will not fund all of the cost. This is often the time to go to that special donor and ask for their help in funding the support person.

### Contents

The goal is to plan a journey for your organization. A journey implies a starting and ending point. We know where we are—it is this fact that motivates us to be elsewhere. Most of us have a vision for where we want things to be. Yet, we all know that in many ways there will be no end to the work that we do, as the resources we seek to protect will be threatened for the rest of time. And perhaps this is the most important reason to have a strategic plan. Without a plan, the daunting challenge of winning a perpetual war can wear us down, especially if we have no sense of the battles won along the way. A strategic plan is used to keep your eyes on the road while maintaining your vision of the ultimate destination. You don't go out into the Sierra Nevada mountains in the Spring without survival gear for that unexpected yet probable late season snow storm. Why go out into the world of fighting causes without your survival gear for the

*continued on page 6*

## THE BASIC STEPS TOWARD DEVELOPING A STRATEGIC PLAN

### 1. Get Organized

- Decide whether to develop a strategic plan
- Get commitment from board and staff
- Determine if outside help is needed
- Outline a planning process that fits
- Form a planning team

### 2. Take Stock (Situational Analysis)

- History and present situation
- Mission
- Opportunities and threats
- Strengths and weaknesses
- Critical issues for the future

### 3. Develop a Strategy

- Select a planning approach
  - Scenario approach
  - Critical issues approach
  - Goal approach
- Identify and evaluate alternatives
- Develop strategy

### 4. Draft and Refine the Plan

- Agree on the format
- Develop a first draft
- Refine the plan
- Adopt the plan

### 5. Implement the Plan

- Implement the plan
- Monitor performance
- Take corrective action
- Update the plan

Source: *Strategic Planning Workbook for Nonprofit Organizations*, Amherst H. Wilder Foundation (see page 13 for order information)

# Strategic Planning for our Rivers' Sake

*continued from page 5*

unwelcome but predictable storms of competition for the hearts, values, minds, and dollars of the American populace?

In order to assist you in your organizational journey, the following articles must be in your backpack: your vision, your mission, your program, your fundraising (marketing) plan, your organizational structure, your human resources, your financials, your timeliness and your evaluation criteria.

## SCHEDULING FOR PLANNING

Get the topic on a upcoming board agenda

Hold preliminary discussions about goals and expectations of the process

Designate a planning committee to make it happen (not to debate it endlessly)

Identify participants, locate a facilitator, plan a scope for the effort, identify and 'assign' homework

Make the effort commensurate with the level of planning

Consider the format of the planning process, but keep in mind that a 'digestion' period between sessions is very important

Consider breaking the process into segments: defining the mission, assessing the starting point (situational analysis), identifying goals and strategies, final decisions and next steps, review the plan

"EEEEK!" you say. Well, look at it this way:

If you don't know where you want to go you will not get there. If you don't know how you are going to get there you may not get there at all. If you don't know how to pay for your journey or who is calling the shots you can end up where you started. If you don't know who has the talents to assist you in the journey and use them appropriately you could end up wasting time and human capital. And if you don't know how to tell when you are there you may just go right on by.

Let's take a brief, but closer look at the survival tools that a strategic plan brings together.

### Executive Summary

One to two pages, summarizes the highlights of the plan, for use in briefing people, serves to articulate the plan in a brief and coherent form.

### Vision and Values Statement

Where you want to be, brings clarity to your actions and program choices, establishes the motivation of the group, clears up contradictory visions that members may unknowingly have, tells who you are and what you stand for, your ideal.

### Mission Statement

Establishes which elements of your vision you are organized to pursue, may not be attainable but is what you work towards, this is your destination

Describes in general terms actions the organization undertakes to attain the vision.

### Program Plan

The program plan is the road map of how you are going to pursue your mission. It includes: the specific methods (tactics) that you are going to implement and their relationship to the mission, and the elements that you will spend the rest of the plan explaining how to fund and staff. The program plan acts as a reality check requiring the discipline of correlating your program directly to your mission (not to the personal preferences of a few).

### Fundraising (marketing) Plan

Bread, dough, argent, coin, sovereigns... how are you going to fund it? Requires specific targets with defensible assumptions and a clear connection between the program and the fundraising strategy. If you cannot market it effectively, it will not sell. Includes: a consideration of the 'sound bites' that will motivate giving; diverse sources; and yearly projections for each funding source with specific assumptions about why you think you will actually get the money.

### Organization and Management

How you will be structured to achieve your goals; who makes decisions and how are those decisions communicated; do you have committees; do you have staff; what is the relationship of the program to the organizational structure?

### Human Resources/ Volunteer staffing

What staff will you need; what is the relationship of the staff to the board; how are disputes handled; how do you reward accomplishment and avoid problem behaviors; are you staffing based on the people you have or the capabilities that you need?

### Financials

Where are you now; what type of

reporting system do you use and does everyone know how to interpret the output?

### Time Line

The who, what, where, when, how—should be in a table or bar chart format and include the specifics of implementation.

### Evaluation Criteria

Evaluation criteria must be specific, quantifiable, clear, and realistic. They ensure that the successes and barriers can be identified and monitored so that adjustments can be made.

### Keys to A Good Process

The keys to a good process are: appropriate schedule, proper preparation, clear understanding of the current situation, and accountability. These elements require that you, as a group, actually devote yourselves to the process with intellectual vigor and discipline...in order to enable the creative to flourish.

Of this list of key components for a successful plan, two deserve special mention: schedule and accountability.

A schedule, both the 'pre' and 'post' process schedule, is of paramount importance. The sidebar (see page 6) defines a set of issues to consider as you lay out the schedule. You need to be sure that the level of planning is consistent with the amount of time allocated. Do not plan two weeks to rethink your entire structure and program, or four months to think through a simple program focus review. Time your process so that the key elements are not during the holidays or August. Review the sequence of tasks to be sure that they will produce a product. And, above all, do not use the excuse of "we do not have enough time." If you do not have enough time

to plan, then you imply that you have time to waste. Actions taken without thought of their strategic importance or implications can be costly—much more costly than a planning process.

Accountability. Ah, the fear factor. "If we do not set measurable goals, then no one can get mad if they are not met," says our unconscious self. In order to overcome the perpetual avoidance of establishing accountability, it is best to put reinforcing mechanisms into place (who, what, when). It is also important to schedule periodic review where you can celebrate success, adjust to unforeseen problems and assess general progress. If the plan is to stay alive, then you must be able to review it and update it without making a federal case out of the process. The plan becomes a filter by which you evaluate, not a declaration that you blindly follow. In establishing performance criteria, measurable outcomes, and regular scrutiny of your performance, you will (and can) integrate the spirit and the letter of the plan into your daily decisions.

### Conclusion

We can continue to do a little bit of everything, or we can do a few things well. Engaging in long-range planning can mean freedom from feelings of perpetual confusion about the goals and objectives; from the sense that we are responding inadequately to crisis or living only IN crisis; from the feeling that we can never get our work done, that we are always behind; from the frantic quality of our days that leads to burn out and a loss to the cause of our best thinkers. We need and deserve to know where we are going and how we intend to get there. We cannot afford to indulge in self-serving cycles of avoiding the challenging choices that planning brings us. We must be what we want to see. I see us as thoughtful and tactically

## MAKING THE PLAN WORK

### Create Work Plans

#### Design a system of accountability

- Create a strategic planning committee
- Plan periodic review sessions
- Add regular review of the strategic time line and outcomes to board meetings

Make sure all board and staff have copies of the plan

Use the plan as a reference point for new activities or budget items

Integrate the measurable outcomes into the annual reviews of staff

Do not avoid uncomfortable issues during the drafting of the plan or they will serve as barriers to plan implementation

shrewd groups with right on our side, add a slice of organized thinking and our work could have an incredible impact. ☛

*Katie Burdick has 25 years of experience as a land use planner, facilitator, trainer and mediator. She has worked with river groups around the country to assist in the progressive refinement of their approach to running the Class V rapids of organizational growth.*

*Friends of the Chicago River*

# A Journey Through Strategic Planning

by Rita Haberman

In 1979, *Chicago Magazine* ran an article about the Chicago River called “Our Friendless River.” In response, a group of Chicago-area river lovers organized the Friends of the Chicago River (FOCR). Like any grassroots organization that has been around for 20 years, FOCR has taken on the gamut of profiles: from an all-volunteer organization, to a project under the wing of another nonprofit, to one of the leading urban river advocacy organizations in the country.

In the 1980s, FOCR’s work focused on public access to the section of the river in downtown Chicago. Today, with Laurene von Klan as executive director, FOCR has six staff people, dozens of volunteers, a crew of interns, 1,000

members, a budget of around \$500,000, and a much broader program. FOCR’s successful programs—based on cooperative planning, hands-on volunteer activities and community outreach—address urban flooding, habitat restoration, river access and recreation, and economic development along the entire 156-mile river and throughout the watershed. How FOCR has used organizational planning to arrive at this point is an interesting story, with numerous lessons and insights for other river groups.

## Annual Work Plans

For many of the last 17 years, Friends of the Chicago River has used annual action plans to coordinate and plan their work. The annual plan process has been staff-driven. Staff took the lead in developing program action plans, and the board reviewed and approved the plans. According to von Klan, FOCR’s annual plans serve several valuable purposes:

- fundraising tool – to write proposals and track progress on funding obligations;
- budgeting tool – to develop and meet budgets;
- communications tool – to provide a forum for both board and staff to share information, to revisit and discuss the organization’s vision and major goals, and to build organizational buy-in on programs and projects.

Through the years, though, it became clear to the leaders of FOCR that

there was a growing gap between their annual action plans and the necessity for longer-term strategies to move toward FOCR’s vision for the river and the organization. They also recognized the need to reconnect the board with the organization, because the staff-driven planning process did not adequately combine the efforts of both staff and board.

## Preparing the Organization for Strategic Planning

Around 1992 the FOCR leaders acknowledged that the organization could benefit greatly from long-range planning, but the organization was not ready for it. Strategic planning takes energy, creativity and time. “At the time, our board was tired and the organization’s sense of purpose came into question,” von Klan recalls. The 11-person board was over-worked, only six were actively involved. In addition, the past director had recently left, and financial trouble was looming.

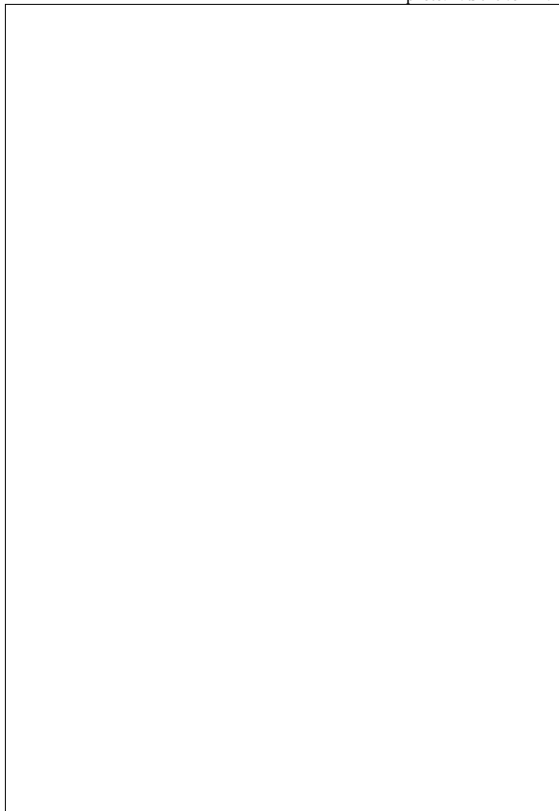
### 1. Rebuilding the board

As a first step, von Klan believed FOCR needed some new blood on the board to re-energize the organization. “You have a sense of how many people you need to play the game, and we thought it was about 18,” she says. Over the next two years, von Klan and FOCR’s board nominating committee set recruitment goals and increased the board to 18 members.

### 2. Taking on strategic planning in “bite-sized chunks”

After recruiting and orienting new board members, FOCR initiated their strategic planning process. In 1994 it organized a board and staff retreat. The bulk of the discussion was over FOCR’s mission, values, and partners. They

photo: Laurene von Klan



*During its planning process Friends reaffirmed its commitment to developing The Chicago River Trail.*



developed visions for the organization that helped set strategic goals. For example, volunteer program development was one need FOCR identified through organizational visioning, and they set some strategic goals to begin meeting that need. "There is a lot you can do in the absence of a full-blown strategic plan," von Klan adds.

## Help from the outside

In 1995, FOCR applied for and was selected to participate in the Institute for Conservation Leadership's (ICL) Sustainable Great Lakes Project (GLSO). The ICL/GLSO project was designed to help groups like FOCR develop strategic plans if desired. "ICL was a good catalyst for us," says von Klan, "they gave us technical assistance, structure and timelines to organize our planning around." Another major benefit of working with ICL was that, as objective "outsiders," they were not afraid to make the board and staff ask tough questions

*FOCR's mission: "To foster the vitality of the Chicago River for the human, plant and animal communities in its watershed."*

about FOCR's programs and whether they were on target to meet strategic objectives. Through this process, FOCR staff developed an excellent working relationship with ICL staff.

## The Benefits

Now FOCR's five-year strategic plan is nearly finished. It is not a "textbook" plan, nor was it a "textbook process," but it has certainly been worth the effort. The benefits:

- A more involved and invested board of directors. Many of the ideas and values the board contributed in the

*Helping people know and love their river emerged as a key theme in FOCR's strategic plan.*

planning process are reflected in the revised mission and programs.

- Very specific and measurable conservation and organizational development goals.
- A set of programs and projects that dovetail together.
- A reason to say "no" to river-related issues not in the plan that inevitably and frequently come up.
- A clear sense of organizational identity and responsibility. "Before strategic planning, a few of us had a sense of who FOCR was, now it is in the hearts of a lot of Friends," says von Klan. "Friends is now held up by a lot of people, not just a few. That was a key transition resulting from strategic planning."

In August 1995, 16 years after the Chicago River was declared friendless, the *Chicago Tribune* ran a four-part series about the Chicago River. The first part was titled, "The Chicago River: A River Reborn," and it opened with, "The transformation of the Chicago River; long dismissed as Lake Michigan's ugly cousin, is well on its way. Quietly, almost

## Voices from the Grassroots

### Key lessons:

- Recognize that grassroots organizations go through cycles. Make sure your organization is ready before embarking on major planning.
- Strategic planning can take many forms. It is a process, and it is a tool.
- Adopt FOCR's philosophy that river work, including planning, should be fun. If it isn't fun, you are doing something wrong. Make adjustments.

secretly, the river has made its comeback." According to FOCR's plans, this comeback is no fairy tale, but a permanent revival of the Chicago River. ➤

*Rita Haberman is a program manager at River Network and coeditor of River Voices.*

### *Product or Process?*

# The Education of a Watershed Association Facilitator

by George Constantz

**W**hen West Virginia entered the era of holistic watershed management in 1993, the first thing we did was develop a statewide strategic plan. During the year-long planning process, I facilitated 90 statewide stakeholder groups through a series of meetings and draft documents. This led to a plan with 84% consensus (DNR & DEP 1994).

### Best Laid Plans

With concurrence of the stakeholders, in 1994 state agencies began implementing two of the plan's strategies: (1) assess the ecological health of the state's watersheds and (2) develop a model watershed plan (Constantz 1994). The former, a technical exercise, is proceeding full speed ahead; the latter, a social experiment, continues to surprise and instruct.

Tasked with implementing the latter strategy, I began crisscrossing the state,

searching for a watershed that

(1) was not so big that folks had to drive more than 40 minutes to a central meeting place,

(2) had been degraded by a few, but not too many, environmental stressors, and

(3) was home to some folks that were ready to try it. When an exploratory meeting in December, 1994, tapped a strong interest, the Lower Paint Creek Association (LPCA) was born.

Following the path I used in the statewide strategic planning exercise, I began facilitating the LPCA's work through my "proven" steps: identify stakeholders, invite them to meetings, develop a consensus vision for the watershed, brainstorm and prioritize issues, brainstorm and prioritize strategies, break the top-priority strategy into bite-sized (=doable) projects, and prioritize bite-sized tasks. But then something interesting happened.

Rather than continue the planning process and come to closure on a comprehensive watershed plan, members rolled up their sleeves and got to work. They began implementing their first, highest priority bite-sized project. Unlike the statewide strategic planning process that produced a comprehensive plan, the local watershed association did only a piece of planning and then started making on-the-ground change. The planner in me was jolted, but the community organizer in me rejoiced.

### The West Virginia Experience

I have now facilitated the work of associations in 15 watersheds and can summarize what I have learned.

Watershed associations need help getting started. When I am invited (and I don't go where I'm not invited) to help organize an association in a particular watershed, I suggest that the inviter gather 6-10 people of diverse backgrounds. These nuclear stakeholders should represent the major interests in the watershed. I define "stakeholder" as a person or group with a vested interest in the watershed. In the Paint Creek watershed, landowners, anglers, and coal miners are examples of stakeholders.

At such an exploratory meeting, often held in the inviter's living room, I introduce watershed thinking and outline what I can (e.g., facilitate their meetings) and cannot do (e.g., help them lobby legislators). Crucial in this initial briefing are the concepts of inclusiveness, conflict resolution, and consensus-building. I leave them with an explicit question, "Do the people of the 'xyz' watershed want to form a watershed association?"

If they answer "yes," I suggest they promote a larger public meeting that would include the complete diversity of stakeholders within the watershed. I



*Improving fish habitat has been a bite-sized, priority project for LPCA.*

photo: Dwight Siemiaczko

cover the same topics as the first meeting, leaving them with the same question.

If “yes” again, I encourage a third meeting to form a group and begin strategic planning. I facilitate their work through the following steps:

**1. Vision** – I ask attendees to imagine what they want their watershed to be like in 50 years, for their grandchildren. Via facilitated brainstorming, during which I discourage judgements, every vision statement is written on a flip chart. Sheets are taped to the wall for all to see.

**2. Deciding how to decide** -- The new group makes its first decision, a procedural one. I introduce the idea that there are several ways to decide: majority, unanimity, consensus. I define consensus as general agreement, which can mean 75-80% agreement by vote, or talking until nobody dissents. It’s up to them. If they are unsure, I suggest they start with the first form of consensus. Most groups have chosen consensus, so let’s assume it in the following steps.

**3. Back to the vision** – I facilitate the group’s coming to consensus on a watershed vision.

**4. Issues** – After defining “issues” as problems blocking attainment of the vision or as opportunities that can be exploited, I facilitate the group’s brainstorming and prioritizing.

**5. Strategies** – A strategy is a general approach that addresses an issue. I facilitate brainstorming and prioritization of strategies that will address their single highest priority issue.

**6. Bite-sized projects** – Because new groups are poor, I encourage them to break their highest priority strategy into bite-sized projects. Again by brainstorming, displaying, and prioritizing.

**7. Hands-on work** – I facilitate the group’s implementation of its highest



photos: Wayne Lanham

*Above and right: Monitoring the health of the creek is another priority project the Lower Paint Creek Association identified in its planning efforts.*

*LPCA volunteers (right) train local high school students.*



priority bite-sized project by helping them recruit workers, raise funds, seek partners, understand background science, set schedules, develop accountability, seek media coverage, evaluate success, and so on.

At some point, the association’s members will feel that they have accomplished enough of their first bite-sized project, gained sufficient confidence and credibility, and grown enough tenacity in two or three leaders, that they are ready to repeat the planning cycle. This launches their second bite-sized project. And so it

continues, hopefully in perpetuity.

Let’s look at the LPCA as an example. The LPCA’s vision is a watershed that outsiders would be happy to visit. Their highest priority *issue* was trash throughout the watershed, their highest priority *strategy* was removing solid waste from the stream, and their first bite-sized *project* was cleaning a specific two-mile stretch of Paint Creek. LPCA recruited seven volunteers, was awarded the landfill’s tipping fee by the *continued on page 12*

WV Division of Environmental Protection, and was loaned a dump truck by the WV Division of Highways. In April, 1995 they disposed of three tons of solid waste.

Then, for a few sunny days, they basked in laudatory newspaper and television reports. This small, specific, visible one-day project raised public awareness within the watershed, increased members' confidence, and empowered the association's new leaders.

Since then, the LPCA has executed two more clean-up drives, yielding 634 tons of trash and eight miles of hand-cleaned stream. The association has also erected tributary signs, deployed citizens trash patrols, built small dams for fish habitat and stocked trout, watch dogged logging & mining operations, established a benthic monitoring team, and attracted \$300,000 in federal money for restoring tributaries degraded by mine drainage.

Perhaps the LPCA's stakeholders are the best judges of the process. Asked about the biggest change in the watershed since the birth of the LPCA, Dwight Siemiaczko said, "People now have confidence that they can make a change." Wayne Lanham felt that inclusiveness has been crucial because "it shows people they can work together." Dwight, Wayne, and the rest all agree that "the Lower Paint Creek Association is ordinary people doing extraordinary things."

## The Planning Cycle

I am an ecologist retrofitted to be a social organizer. My linear self thought the most important thing an association could do initially was to produce a watershed plan that would guide their work for several years. I was wrong. Some groups resist producing a comprehensive plan, but recurring planning, with its reexamination of issues and strategies, can be energizing,

*Some groups resist producing a comprehensive plan, but recurring planning, with its reexamination of issues and strategies, can be energizing, empowering...and fun.*

empowering...and fun.

I assert that a healthy planning cycle is more important than a printed plan.

## Criticisms

In fairness, some of my friends have expressed misgivings with this consensus-based approach:

**It's a sell-out.** Resolving conflicts with opponents leads to a consensus that is weaker environmentally than outcomes from single-position, narrowly focused advocacy. I see individual commitment to inclusive or advocacy processes as a choice based on personal needs and situational constraints.

**It takes too long.** Building consensus with different kinds of people can take longer than advocacy—initially. Early meetings encourage people to get in touch with their basic values, to express them, and to listen to others, thereby uncovering common ground. But this up-front investment pays dividends in diverse workers, favorable media coverage, interested elected officials, and broad community support.

**It doesn't work everywhere.** This process may fail in a watershed where an entrenched issue has polarized the community so severely that opponents will not share a single table (e.g., advanced dam fights). It also won't work where local people do not rise to lead it.

## A Growing Watershed Movement

Where has this process led the watershed experiment in West Virginia? There are now 20 watershed associations operating by inclusiveness and consensus. An infrastructure of support for local associations has arisen: the

Canaan Valley Institute provides facilitation, the WV Rivers Coalition helps associations in three major recreational watersheds, the Stream Partners Program provides \$5,000 grants, and the Watershed Network coordinates technical and financial assistance. These connections suggest that inclusive, consensus-based, cyclical planning processes may meet the needs of many river conservation groups, from backyard stream restoration clubs to federal government agencies. 🐟

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*Dr. George Constantz is with the Watershed Assessment program of the West Virginia Department of Environmental Protection. He is also the founder of the Pine Cabin Run Ecological Laboratory, located in the Cacapon River watershed.*

## Acknowledgments

The U.S. Environmental Protection Agency-Region 3 funded the first two years of this evolution; the WV divisions of Natural Resources and Environmental Protection nurtured my facilitation work; the WV Rivers Coalition, Canaan Valley Institute, Governor Gaston Caperton, National Park Service, Office of Surface Mining, and River Network supported their own slices of the movement; and West Virginia's local watershed leaders taught me passion and tenacity. Thanks to all.

## References

- Constantz, G. 1994. West Virginia's approach to watershed management: our first steps. Proc. 16th Conference Organiz. Wildlife Planners, p. 63-65.
- DNR and DEP. 1994. A strategic plan for West Virginia's watersheds. West Virginia divisions of Natural Resources and Environmental Protection, Charleston, WV. 17 pages.

## Why Strategic Planning is so Important to Funders

“Speaking from the McKnight Foundation’s experience, strategic planning has been very valuable. Mississippi River conservation issues and opportunities are overwhelming. The only way to sort them all out is through strategic planning. Absent our plan, we would be ‘flooded’ with too many options and directions. Periodic assessments help us evaluate progress and update our strategy. Our plan guides us to work effectively toward our long-term objectives. I think other organizations working on river conservation will find a sound strategic plan equally useful.”

Dan Ray, Program Officer, Environment  
*The McKnight Foundation*

“Wilburforce Foundation believes strategic planning is an essential planning tool and a dynamic learning experience wrapped in one package. It’s natural for groups to go through transitions in their goals and management styles as they grow, and proper planning can help make these changes flow more easily. At the same time, the planning process fosters creativity that can lead to a new and bolder vision for the organization.”

Tim Greyhavens, Executive Director  
*The Wilburforce Foundation*

“More and more frequently I am asking groups about their planning efforts, especially the groups we’ve funded for a while. We are interested in the overall, long-term health of organizations, and we view strategic planning as a survival tool.”

Jon Jensen, Program Officer  
*The George Gund Foundtion*

## Publications

*Strategic Planning Workbook for Nonprofit Organizations*, Revised and Updated by Bryan Barry. Available for \$25 (plus shipping) from:

Amherst H. Wilder  
Foundation Publishing Center  
919 Lafond Avenue  
St. Paul, MN 55104  
1-800-274-6024.

*Thinking Strategically: A Primer on Long-Range Strategic Planning for Grassroots Peace and Justice Organizations* by Randall Kehler, Andrea Ayvazian, and Ben Senturia. Available from:  
Exchange Project  
Peace Development Fund  
44 North Prospect Street  
Amherst, MA 01004  
(413)-256-8306

“Your First Action Plan” by Don Elder in *Starting Up: A Handbook for River and Watershed Organizations* by River Network.

“Planning for Fundraising” by Pat Munoz and Liz Raisbeck in *River Network’s River Fundraising Alert*, fall 1996.

*Clean Water Initiative Water Works: Your neighbors share ideas on working in partnership for clean water* by Tennessee Valley Authority, March 1997, first edition. A creative, easy-to-read publication covering the steps from ideas to building a sustainable organization. Showcases successful strategies used by numerous groups and profiles dozens of citizen river activists. Available free from:

TVA

Water Management  
Clean Water Initiative  
WT 10-K  
400 West Summit Hill Drive  
Knoxville, TN 37902-1499  
(423)-632-4712

## Organizations

**Institute for Conservation Leadership**  
ICL’s mission is to train and empower volunteer leaders and to build volunteer institutions that protect and conserve the earth’s environment. ICL offers a broad range of training and other services custom-designed for your organization’s needs, including strategic planning, campaign planning, and many other topics. Contact:  
ICL 6930 Carroll Avenue  
Suite 420  
Takoma Park, MD 20912  
(310) 270-2900  
toicl@aol.com

**Environmental Support Center**  
ESC is a national nonprofit dedicated to helping local, state and regional environmental organizations become better managed, funded and equipped. Through their Training and Organizational Assistance Program, ESC assists groups with planning, strategy development, organizational development and many other topics. Contact ESC at (202) 966-9834 or visit ESC’s web site <http://www.envsc.org/>

# references & resources

# Charting a Course From Science to Advocacy: *Watershed management in the Fox-Wolf River Basin*

by Bruce N. Johnson

Over its five years of existence the Fox-Wolf Basin 2000 watershed organization in northeastern Wisconsin has played a variety of roles. It started in 1992 as the Northeast Wisconsin Waters for Tomorrow (NEWWT), a group of scientists and economists seeking cost-effective ways to clean up the Fox-Wolf river system. Then in 1994 with its science-based findings in hand, NEWWT transformed itself into Fox-Wolf Basin 2000 (FWB 2000), an advocate for the river and a "basin council" inclusive of many interests in the Basin. Through this journey, the group has learned the value and necessity of strategic planning.

## The Fox-Wolf Basin

The Fox-Wolf Basin in northeast Wisconsin drains 6,400 square miles before flowing into Lake Michigan at Green Bay. The Fox-Wolf is a classic "working river," providing its communities with food, drinking water, transportation, power, recreation, and a conduit for getting rid of wastes. By the mid 1900s, parts of the lower river were dead, laden with raw sewerage and discharges from pulp and paper mills. Over the last three decades, however, the health of the river has improved significantly, but many important water resource issues remain. Walleye and other species are not safe to eat. The waters remain choked with soils and nutrients washed into streams and tributaries. Exotic species continue to threaten the ecological balance of the region. Algae blooms cause foul odors during low-flow periods in the summer, inhibiting recreational use. Fish, wildlife and benthic populations and habitat are also severely degraded. These impairments

keep the lower Fox River and the lower bay of Green Bay listed as a Great Lakes "area of concern" by the International Joint Commission.

## Using Science to Promote Cost-Effective Management

As required by the Great Lakes Water Quality Agreement between the US and Canada, a Remedial Action Plan (RAP) was developed to assess the causes of the problems and make recommendations for

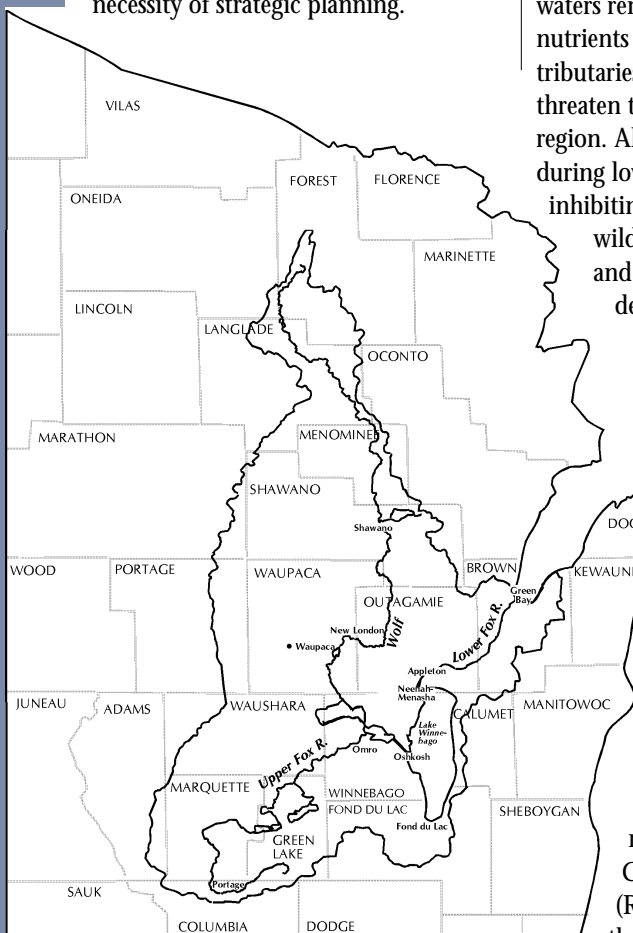
restoring beneficial use of the waterways. Completed in 1988, the Stage One RAP identified more than 120 management actions designed to reach a desired state for water resources. Unfortunately, financial resources for implementing these actions were clearly dwindling.

In 1992, a small group of citizens took the initiative to find a comprehensive and cost-effective means of cleaning up the Fox-Wolf Basin waters. They formed a non-profit research group called Northeast Wisconsin Waters for Tomorrow (NEWWT), and raised \$400,000 from local sources to demonstrate cost-effective, watershed-based resource management. Using a model of the river system and the costs of different management options to reduce pollutant loads, the NEWWT team developed options designed to meet water resource goals at the lowest cost. The report was well received by the Wisconsin Department of Natural Resources, which began to reorganize into "basin teams" in order to more effectively manage the state's water resources.

## Building a Basin Council

In 1994 with the NEWWT Analysis Team study completed, the board of directors discovered their job had really just begun. Identifying the problems and recommending a process for addressing them was just a start. Rather than closing shop, or conducting another analysis, NEWWT transformed itself into Fox-Wolf Basin 2000—a basin council of stakeholders working cooperatively on basin-wide water resource management issues. I was hired as executive director to expand the board of directors, manage the organization's operations, begin work on cost-effective solutions, and advocate for a watershed approach.

## Initial Plan and Work



**FOX-WOLF RIVER BASIN**

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Finding support for the concept of a watershed approach was not difficult. Setting priorities among dozens of local and regional issues in the Fox-Wolf Basin, coupled with FWB2000's own limited resources, was the difficult part. Our board of directors had a lot of great ideas, and came together for two meetings to discuss them and develop a two-year work plan and budget. Most of the initial discussion occurred during our final meeting in 1994. The board met again in the first week of January 1995 to review the mission and develop key objectives. The session was attended by about half of our board and was facilitated by a community natural resource and economic development agent of the University of Wisconsin-Extension. The new mission and basic goals they developed were dumped squarely in my lap to flesh out the details and come up with a two-year plan, which was approved a month later.

In retrospect, the plan we developed made it look like we were going to do everything—continue our research (this time focusing on applied research); develop stronger programs in education, advocacy for a watershed approach, and resource protection; and deal with water-related issues as they arose. Off I went in the fall of 1994—the only staff person—with an incredibly ambitious, all encompassing two-year plan. With the help of the board, I attended meetings, networked, fostered research projects, took positions on a few issues, formed a land trust, held a conference, raised funds and hired additional staff—rarely glancing back at our workplan. After a year and a half of putting out one fire after another some malcontent dared to ask “Where have we been and where are we going?”. We drew a collective gasp and embarked upon that scourge of nonprofit organizations strategic planning.

### **FWB2000 Strategic Planning**

Again with the help of University of Wisconsin-Extension staff in developing surveys, planning and facilitating planning sessions, we slowed down long enough to start asking ourselves and others how we were doing. The board's executive committee and four members at-large volunteered to serve as the strategic planning team.

### **Taking Stock**

Over a period of eight months, some of which was filled with pain and anguish, the strategic planning team developed a strong vision and a five-year strategic plan for realizing that vision.

We conducted two surveys—one for internal use, the other for external input. With the information from those surveys, the team assessed our strengths and weaknesses. We resurrected the old two-year plan, and found we had not done some of the things we had set out to do, mostly because of its broad scope. We learned we had done a poor job of advancing our organization's mission. We also found, however, the work we had been doing put us in a unique position to significantly contribute to water resource management. For example, our modeling capability is as yet unparalleled in the region and has been very useful for a reorganized Wisconsin DNR.

### **Annual Workplans**

Once the five-year strategic plan was finished, I took the plan back to the other staff members to develop an annual workplan that reflected not only the strategic planning components, but the day-to-day responsibilities we shared in running the organization. We estimated the time needed, found gaps and overloads and made adjustments. The work plan is now in a simple spreadsheet format including specific time commit-

ments by each staff member for various components. It is very simple to track actual time spent and compare it to targets for performance evaluation and reporting progress to the board.

### **Linking Program and Budget**

We also made the critical link this time between our program plans and our budget. This has made grant writing much easier as all of the budget and workplan questions funders typically ask are at our fingertips. It has also been easier to link our goals to appropriate funding organizations.

### **Keeping the Plan Alive**

This time the plan will not be allowed to sit on a shelf. A final strategic plan report is being prepared for distribution to current and potential supporters. An update of the strategic plan is on the agenda of every executive committee meeting. In fact, we already found we had been a little ambitious in our timing and have made adjustments. The strategic plan itself will be evaluated and updated every two years.

### **The Benefits**

FWB2000 has already seen numerous benefits from its strategic planning efforts. Organizational priorities are clear, as are specific, measurable tasks. Fundraising efforts are better targeted. Supporters have been impressed with the fact that we invested time in charting our future. Like any other nonprofit organization, FWB2000 faces rough seas ahead. But, we no longer feel as though we are drifting from island to island, but sailing toward a reasonably clear horizon.

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*Bruce N. Johnson has been the executive director of FWB2000 since 1994. Prior to that, he was the director of the Lake Michigan Federation's northeast Wisconsin office.*

*Addressing the Challenge of Strategic Planning with Inclusive, Watershed Councils:*

# The Tualatin River Watershed Story

by Jacqueline Dingfelder and Vaughn Brown

The Tualatin River begins in Oregon's Coast Range as a clear, cold water stream rolling over several falls. Shortly thereafter it turns into a slow-moving river, meandering for 80 miles through rich farmlands and Portland's rapidly growing urban area on its way to the Willamette River.

The issues facing the 700-square-mile Tualatin River Basin are complex. Half of the watershed is forested, one-third is in agricultural land, and 15 percent is urbanized. Growth and development pressures are intensifying as predictions of 400,000 additional people

living in the Portland metro region in the next 20 years are proving true. This rapid urbanization of the watershed and competing demands for agricultural, forestry, industrial, and recreational uses add to the complexity of demands on the Tualatin. This complexity begs for a watershed approach to resource management.

## The Beginnings of a Watershed Council

Recognizing the need to minimize impacts on the watershed and develop comprehensive local solutions, a small group of agency and government representatives initiated meetings in 1993 to discuss formation of a Tualatin River Watershed Council (TRWC). For

more than two years, the group met monthly to determine the council's membership, create a mission and vision, develop bylaws, and formulate some goals and objectives.

In February 1996, the Council was officially recognized by the Washington County Board of Commissioners (in Oregon watershed councils recognized

by local governments are eligible for various funding sources). A grant from the Oregon Governor's Watershed Enhancement Board enabled the council to hire a full-time coordinator, Jacqueline Dingfelder, in May 1996. Today the TRWC has 19

seats with representatives from the following interest groups: agriculture, forestry, environmental interests, citizens, local government, business, education, water and sewer providers, and homebuilders/developers. The council uses a consensus decision-making process.

## Watershed Council Established, What Next?

More than two years in the making, the TRWC found itself "all dressed up," staffed—and not really sure where to go. The TRWC needed to clarify future direction, establish priorities, build teamwork and strengthen its organizational capacity. The council raised funds to hire Vaughn Brown, an organiza-

tional consultant to facilitate and coordinate this strategic planning process.

TRWC faced three major challenges going into the process:

1. All TRWC members participate as volunteers and had very limited time to give (only a few hours each month).
2. TRWC members were tired of planning. They wanted to quit planning and "do things."
3. Many of the TRWC members, representing a diverse group of interests, were not quite sure of the common ground they had with other members. They were unsure of how to cooperate with people they did not know and, in some cases, did not trust.

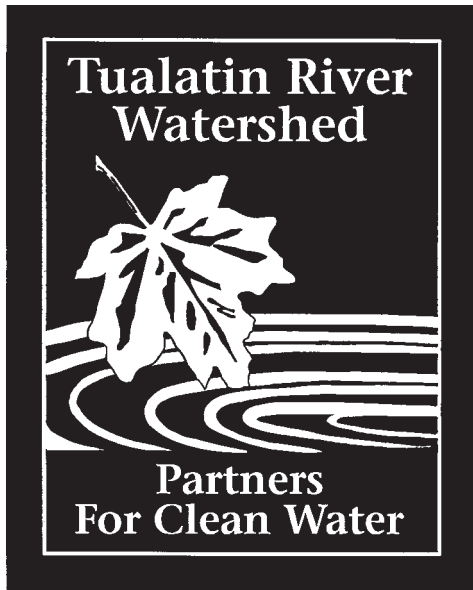
The primary goal of TRWC's strategic planning was clear—to develop a workplan that identifies watershed improvement programs, projects, and services that the TRWC membership will sponsor and support. An essential step in doing so, however, was to begin to build relationships and trust among council members. Without that foundation of trust, it was clear that a consensus on actions would be extremely difficult.

## The Planning Process

### 1. Identify mandates.

With the commitment to develop an action plan, the council began their strategic analysis by identifying organizational mandates from the Governor's Watershed Enhancement Board, county commissioners and others. This list laid out the action framework by highlighting obligations, responsibilities, and constraints.

One of the mandates worth mentioning was consensus decision-making. We led the group through discussions to help everyone better understand consensus decision-making,





the possible levels of agreement that allowed a consensus and the mechanics of achieving those agreements. Training on consensus alleviated members' fears of being "rolled over" in the process. It also set the tone for all future council decision-making.

## 2. Member Round Robin.

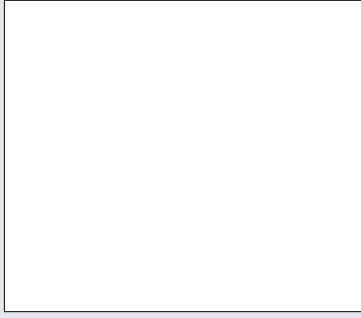
Next we asked each member of the group to share their reasons for being on the council. This exposed members' motivations and was a powerful catalyst toward mutual acceptance and legitimacy of individual interests. It also uncovered a great deal of common ground among the members.

## 3. Members identified priorities.

Rather than starting with a blank slate of options for TRWC's work, we gave members a worksheet that guided them through the process of identifying their priorities for TRWC programs, projects, and services. Members returned their "homework" assignment, and we compiled the results. The suggested activities fell into four functional areas:

- Watershed Enhancement - resources issues
- Issue Forum - role model for collaborative decision-making
- Education and Outreach - message and audiences
- Organizational Development - structure and funding

The council members accepted these four main functional categories, and they formed the framework for identifying and prioritizing its actions. With an action framework clearly identified, members' fears and reluctance to get involved disappeared. Members eagerly worked in small groups to rank actions within each of the areas. Members of the council made decisions more easily,



*"Although, the Council spent many months developing its purpose and vision, we needed a road map on how to achieve that vision. The strategic planning process helped us to identify priorities and strategies for attaining that vision. In addition, it created consensus and renewed enthusiasm within the organization."*

John Jackson, TRWC Chair

formed work groups and subcommittees, accepted responsibilities and started taking on action items before the plan was formally accepted.

## The Benefits

The TRWC conducted its strategic planning process over a four-month period. Was it worth the effort? The benefits so far include:

- a heightened enthusiasm for the TRWC.
- improved attendance at TRWC meetings.
- a more supportive organizational structure designed around the four functional areas identified in planning. Due to members' understanding of the types and amount of work necessary to

keep the council moving efficiently, organizational needs are being addressed with greater intensity.

- clear roles for volunteers to undertake worthwhile priority projects.
- improved decision-making made in the context of the TRWC's four functional areas, and priorities established under each of them.
- a framework for evaluating proposals for endorsements of others' work in the Basin and beyond.
- a tool for fundraising, showing that TRWC is deliberately and thoughtfully structuring its work.
- enhanced group interaction—members are more forthright, friendly and productive during group discussions.

The TRWC, like most other watershed councils with a broad set of interests on the table, face the difficult task of finding common ground and setting priorities. For the TRWC, strategic planning was not only the "ticket" to finding common ground, but also to building relationships and trust, infusing energy into the organization and identifying direction and priorities. The Tualatin River may be slow and meandering, but with its three-year strategic plan in hand, the TRWC is marching on to protect its home watershed. ➤

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*Jacqueline Dingfelder has served as coordinator for the Tualatin River Watershed Council since May 1996, and has more than 12 years of experience in the areas of environmental planning, public outreach and water resources management.*

*Vaughn Brown was the TRWC's planning consultant and has more than 15 years experience in watershed planning, public involvement and organizational development.*

Don't miss these great sources of information produced especially for you

# River Network Publications

## River Voices

### Missing some back issues?

Back issues still in print, 16-24 pgs. First back issue: \$3 for River Network Partners, others \$6. All additional issues with same order: \$1 each. Additional subscriptions for Partner's board members are available at a discounted price of \$10 each. Annual subscription: \$35.

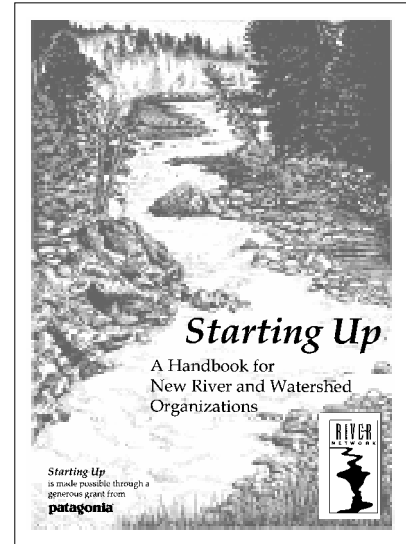
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## Starting Up

### A Handbook for New River and Watershed Organizations

This handbook provides information about how to run a successful organization. Based upon the invaluable experience of dozens of leaders in the river and conservation movements, its articles lay out the critical moves every newly forming organization needs to make to thrive and grow - including: choosing a name, developing your mission statement, recruiting your board of directors, fundraising, working with volunteers, working with the media, producing a newsletter, pages of river-related examples and much more!

Additionally, it provides you with specific concepts and tools for building a strong and healthy river organization with a specific focus on the watershed approach to river conservation. 1996, over 350 pgs. River Network Partners \$10, others \$25.



**RIVER NETWORKS**  
**RIVER FUNDRAISING ALERT**  
Special Events Volume 2, Nos. 3 & 4 Fall/Winter 1995

### Producing Special Events

Using your creativity and good sense to make the most of your fundraising events

By Pat Steiner, River Network

Fundraising events are an excellent way to draw new supporters into your organization and gain visibility for your organization's work. Special events can also provide your group with an additional source of income to supplement and diversify a budget based on memberships, regular gifts, and foundation grants. Here are some tips to provide you with your next special event:

- 1. Events should always accomplish more than just raising money.**  
Special events are almost always time-consuming to organize. They should accomplish a number of purposes. The most common include: activating people (getting them out of their houses), building morale, publicizing an accomplishment or announcing a new program, providing information, generating new members, involving board members, volunteers and potential supporters, generating news coverage, reaching out to new segments of your community, meeting your community's social needs, and just plain having fun.
- 2. Choose an event that is appropriate and repeatable.**  
It is important to select an event that complements or reinforces your organization's mission and can be repeated and built on year after year. A gift tournament, for example, would not be appropriate for a river conservation group unless, of course, it was held at a gift course designed specifically for non-toxic environmental topics. Examples of appropriate and repeatable events for river groups include river festivals, riverwalk dinners, paddle-thons, river trips, rafting, rock-climbing, and so on. Developing an annual event is a great opportunity to be creative in coming up with an annual event that will appeal to your constituency and excite them about your group. (For more ideas, see article on page 51.)
- 3. Start Small.**  
Special events, especially large ones, can be extremely time-consuming and even risky. Don't bite off more than you can chew. Choose one or two events a year that you can handle easily and that will have a fairly large payoff in terms of money or members. The first time someone else is handling most of the work for you this is an excellent opportunity to involve a board member or volunteer in the process. Start small and build your way from big events on benefits that involve a large number of people. While there are many reasons of the big event, such as the annual gala, such events are rare in the communities where grassroots groups usually operate. And that number is some other unexpected occurrence can
- depress attendance at the best planned event and turn a "sure thing" into a fundraising disaster.
- 4. Create a committee for the event.**  
For small groups, the success of any special event will depend on how well you do your job of engaging other people in its success. Think about who on your board and among your volunteers might be interested in helping with a particular event, and then hold a preliminary meeting to outline their support. Ask for their ideas and input in promoting the event and get them excited about participating.
- 5. Prepare an income and expense budget.**  
Before embarking on a fundraising event, do a careful and realistic analysis of how much you can expect to raise. Don't rely solely on your own projections. Talk to other people who have done similar events and check your figures with them. Once you have come up with a realistic projection of income, prepare a detailed expense budget. While you will not have one event to another, a good rule of thumb is to try to keep costs at less than one-third of the income. If an event is going to require a good deal of staff time, figure that into the cost equation as well. If you are going to be keeping track of how to get many things done as possible. Food, drink, prizes, and even printing and design services are often donated in exchange for a percentage on the merchandise.

(continued on page 2)

## River Fundraising Alert

The *River Fundraising Alert* is a quarterly publication designed to help river and watershed organizations support themselves financially. River Network Partners receive the *Alerts* as a Partnership benefit.

4-8 pgs. First back issue: \$3 for River Network Partners, others \$6. All additional issues with same order: \$1 each. Additional subscriptions for Partner's Board members are available at a discounted price of \$10 each. Annual subscription: \$35.

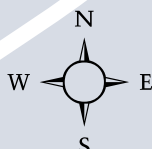
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- Special Events (95)
- Major Donors, Part 2 (95)
- Major Donors, Part 1 (95)
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# By joining the River Network Partnership, we can help you navigate your river work



Since 1988 River Network has helped hundreds of river and watershed conservationists. Our vision is to have vigilant and effective citizen watershed organizations in each of America's 2,000 major watersheds. Helping river and watershed organizations through the Partnership is one strategy for making our vision a reality. Let us give you the tools you need to be effective in your watershed.

## Here's some feedback from River Network Partners:

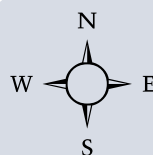


*"I could not have founded this organization without the technical assistance and wonderful encouragement I have received from River Network."*

Nancy Jacques  
Colorado Rivers Alliance

*"Everything we have received from River Network—the Fundraising Alert, the special publications—have been extremely helpful, providing the kind of practical information we badly need and can put to use."*

Kevin Bixby, SW  
Environmental Center, NM



*"River Network has saved me endless hours of research time."*

Fred Miller, Nine Mile  
Creek Conservation  
Council, NY

*"Having River Network available for advice and information on fundraising and other issues has made my job easier."*

Sally Bethea, Upper  
Chattahoochee Riverkeeper,  
GA

## Partnership Dues

Joining the River Network Partnership is one of the best investments you can make in protecting your river and its watershed. You'll receive valuable publications (a \$122 value), plus one-on-one advice and the opportunity to network with hundreds of like-minded river and watershed conservationists from across the country.



### YES, we would like to be a River Network Partner

*Citizen led, river and watershed conservation organizations\* are invited to join as River Network Partners. Dues is based on your organization's annual budget:*

<u>Budget</u>	<u>Dues</u>	Budget:
\$0 - \$20,000	\$60	\$ _____
\$20,001 - \$100,000	\$100	Amount dues enclosed
\$100,001 - \$200,000	\$200	\$ _____
\$200,001 +	\$300	

\*Individuals and government agencies are invited to join as River Network Members. For more information on membership categories and benefits, contact River Network.

NAME \_\_\_\_\_ EMAIL \_\_\_\_\_

ORGANIZATION \_\_\_\_\_

ADDRESS \_\_\_\_\_

CITY \_\_\_\_\_ STATE \_\_\_\_\_ ZIP \_\_\_\_\_ PHONE (\_\_\_\_) \_\_\_\_\_

For more information contact: River Network, P.O. Box 8787, Portland, OR 97207-8787 (503) 241-3506 [rivernet@jgc.apc.org](mailto:rivernet@jgc.apc.org)



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*Thanks for your commitment to America's rivers*

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Mono Lake Committee, CA  
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Environmental Resource Center, ID  
DuPage River Coalition, IL  
Friends of the Royal River, ME  
Nanticoke Watershed Alliance, MD  
Nashoba Paddler, MA  
Bergen Save the Watershed Action Network, NJ  
Wildlands League, Ontario  
Chesapeake Bay Foundation - Juniata Project, PA  
Rio Grande/Rio Bravo Basin Coalition, TX  
Audubon Society - Central Basin, WA  
Citizens for a Healthy Bay, WA

## RENEWED PARTNERS

Alaska Federation of Flyfishers, AK  
Alabama Rivers Alliance, AL  
Headwaters Institute, CA  
Santa Barbara Salmon Enhancement Association, CA  
Snowmass/Capital Creek Caucus, CO  
Coalition for Natural Stream Valleys Inc., DE  
Broad River Watershed Association, GA  
Palouse-Clearwater Environmental Institute, ID  
Portneuf Greenway Foundation, ID  
Tri-State Implementation Council, ID  
Mackinaw River Project, IL

Sierra Club - Delta Chapter, LA  
New England FLOW, MA  
Hubbard County Environmental Services, MN  
Mississippi River Basin Alliance, MO  
National Committee for the New River, NC  
New Hampshire Rivers Council, NH  
Greenway Conservancy for the Hudson River Valley, NY  
Nine Mile Creek Conservation Council, NY  
Mill Creek Watershed Council, OH  
Rivers Unlimited - Mill Creek Restoration Project, OH  
Unified Sewerage Agency, OR  
Partners For the Saskatchewan River Basin, SK  
League of Women Voters - Texas, TX  
Back Bay Restoration Foundation, VA  
Elizabeth River Project, VA  
The Battenkill Conservancy, Inc., VT  
Lake Roosevelt Forum, WA  
Rock River Coalition, WI  
BEAR Project, Inc., WY

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**Thank  
You!**