

Chris, you're joining us on the call?

I'm here.

Alright, great. And Margaret, you're on?

I am.

Let me bring Chris Komar on who is a principle independent consultant for a firm called the Double K Outfit in Montana. Chris has 28 years of experience working with nonprofit corporate and government clients, and as a principle of the consulting group she specializes in working with nonprofit organizations, public lands managers, and community organizations and individuals to create opportunities to work productively together in new and sometimes extraordinary ways. Chris is a frequent speaker and instructor on subjects ranging from how to develop successful partnerships to aspects of nonprofit management. Ne of Christine's attributes is described by others as bold, creative, energetic, and unafraid of courting change. I have always been refreshed by our association. Chris is a visionary thinker and loves to think out of the box, and as I mentioned to you earlier on the webinar, we did a presentation together, Margaret, Chris, and I, for the national Association of State Park Directors and also one for NRPA membership, kind of this overview of strategic volunteer management and where public sector agencies need to go in the future, and I think you're gonna find that

the report they did for the Forest Service, which you're gonna hear about now, is really interesting stuff. I know that when we heard a preview of it and our national organizational partners were fascinated by this. The state park directors all wanted to get a copy of it, and you really are hearing the first formal presentation of these report findings and their conclusions about them, so let me turn it over to Chris and Margaret.

Thank you Rich. This is Margaret, and I want to again just take a contractual framework for the work that we were ask to do and how it fits within the foundational elements that Jim spoke about earlier in the beginning of the presentation. When Martha Katel and Anne Christiansen and Liz Close discussed the next step from the outcomes of the April meetings, they wanted to make sure that they laid that foundation, they had both an understanding of the as-is state of the Forest Service Volunteer Program as well as insights into the elements of what the program could be. Lisa's and Jim's work has allowed a very clear picture of as-is to exist, and it covers a broad spectrum of folks and partners and people at all different levels, and our work then would focus on doing additional knowledge acquisition in the area of what could be. It's always dangerous to follow two Ph.D. researchers, because our work that we're talking about is much more qualitative, it's not quantitative, it's not specifically valid, but it's meant to give some insights and perspectives into things that the agency could consider as they start looking forward to restructuring the way they want to deliver their volunteer program. I cannot underscore the importance of all those

great comments and ideas that Lisa brought forward. It really is in our minds I think a combination of those internal thoughts as well as some external perspectives that many of your existing partners can provide as well as some nonprofit agencies outside of the natural resource world that we really want to talk about today. And why bother? Why is this important? Well, it's all a matter of perspectives. Sometimes only when we get outside of our own experience are we able to see things with a new perspective. What you end up finding is that the issues that you're dealing with are very similar to those that other nonprofits outside of your realm are dealing with, but their approaches may be different and that may come from their history and their tradition, but we can learn from that. The other issue is that if any structural changes are gonna be considered, it's real important that you have not only some internal examples, but some external examples, and that's really what we've attempted to do here. So as we've stated here, our work was focused on building upon Lisa's work with some slightly different questions to ask some of your nonprofit partners, who you are working with now, and then give you some insights on some nonprofit entities which are outside of the natural resource world, and I think Jim framed it very well that if you look at the whole nonprofit sector, and it is an amazing world that so many of your partners live in, the environmental sector is a small part of it, and there's the arts and there's the education, and there's the environmental. It's an amazing sector, and there's a lot that we can learn from our partners outside of our particular sector as well as those who are within it.

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So what did we do? We worked with the regional volunteer coordinators of the Forest Service to develop a list of approximately 35 organizations to think about – we worked very hard to get into both nonprofit as far on the external side that outside of the natural resource world that were of large scale as well as small scale. We wanted to make sure we got some emphasis from arts, from social organizations, and education issues, and we'll talk a little bit about the folks that we talked to and we're gonna give some examples of them. We developed questions at a very high level and we did this purposefully. What I think you're gonna have if you look at all the combined research that all three of our organizations have produced both as individuals and companies, you're gonna find that you have some really good tactical information from the survey that Lisa did as well as some good strategy observations, and we wanted to go way up with our questions. We wanted to ask these nonprofits strategic questions. We had some questions on program delivery, and quite frankly those are the ones that I know everybody needs now, and those are important, but the leadership team who guided this wanted our team particularly to go more strategic and get some understanding of what are some of the things that the agency should be considering if they want to begin to make a shift in how they're looking at delivering services in the future. As SOR-5, areas of focus were overall strategy. We wanted to talk about the organizational structure and the importance of structure in delivering a mission-based nonprofit. We wanted to talk about the importance of funding, how is it done, who does it. We wanted to talk, as I said, a little bit about programs and activities, the tactical delivery of services, how are

volunteers used, and then we wanted to talk about how does technology affect your delivery system and what are the things that people are thinking about as it relates to innovation and change. We had these 16 interviews over the course of 1 1/2 hours each. Every time Chris and I got off a call we were inspired. Chris has been in this world for a long time, and for Chris to get inspired, you know it must be an exciting and innovative idea. I felt like I was just sitting – you know, I was very excited to have the opportunity to learn as much as I did from this process, and the executive summary report and the findings is in fact one of those that is posted along with Lisa, Dr. \_\_\_\_\_, and Dr. Apshe's work. At the end of the presentation you'll get that.

So let's talk about what we found. We're gonna divide this presentation up into two sections. One is gonna be what are some of the key findings that we found out from your nonprofit partners, and then the second half is gonna be what are some of the key findings we found out from the external nonprofits, and I will readily admit that I have listed all these logos for your nonprofit partners off their webpages, so if there's copyright issues I apologize in advance, but I wanted to make sure that we recognize several of the folks who helped us with this study and bring to light some of their observations in general. If there's nothing else that you take away from this presentation that Chris and I are doing, it's one key finding that I want you to think about, and really, it is in fact this apparent misalignment of expectations that we found when we talked to your nonprofit partners. Obviously, what the agency needs to understand is that nonprofits

can't be successful if they're limited – I'm sorry. The key issue here is that the agency has a tendency to at least talk about and focus their efforts and talk about the program of work. Obviously that is the work to get done, getting the boots on the ground, but the partners are in this business because they're passionate about stewardship, and in essence, we know the agency is passionate about stewardship, so what's interesting in this discussion is everybody wants to achieve the same outcome, but the way that they go about doing it in essence sometimes is a hindrance to success. The partners want to do the work, but more importantly they want to engage and expand their contribution to stewardship. Some agency folks tend to focus on the work elements, and yet the partners recognize that the best experience is gonna be what brings people back, and so one of the key issues here is that it's kind of a dual misunderstanding. If the partners don't understand the purpose of the work, they can't readily appreciate it and recruit it and advertise it and even structure the experience, but they can if the time is spent. And the other issue is that the volunteers in the interest of keeping their partners and their people happy – your nonprofit partners are wanting to keep their mission delivery strong and successful and growing, they want their people to have a good experience, and they want their people to come back. What we have here are three examples. Basically, when we talked to Nevada Wilderness, they talked about what we really want someone to have is an experience because it's as important as the work. When someone has an experience it usually leads to a greater appreciation and understanding and it allows people to create and care and

potentially create that stewardship epic. When you talk to The American Hiking Society and Washington Trails Association, both those organizations have these volunteer tourism initiatives. Clearly if someone is going on vacation the work is important but the experience is as important. We talked to Region 5, we talked to them about their trees and trails program, and one of the things they talked about is it is as important we found that hosting a barbecue for our local partners is a greater opportunity for us to create and recruit volunteers and putting all the advertisements out in the world because in fact it is the creating of community and experience that people are looking for. Chris, would you like to add to that?

I would like to add a couple little stories and maybe have you be able to hook these in your mind. The friends of Nevada Wilderness talked about most volunteer projects tend to be like let's build a boat, but their philosophy is let's teach people to love the sea, because if we have people who love the sea then they will learn how to build a boat so they can be on the sea. I think it's that kind of thinking across all these organizations at some level that relates to stewardship, but it's about helping volunteers become a part of the place and realize their own interests as well as serving, which is what they want to do. A couple of these organizations talked about their special skills and being able to work with volunteers, like they're small, they're nimble, everybody wanted to be at the table to better be able to work out how the Forest Service and their organizations could work more smoothly together.

The next finding had to do with kind of a misalignment of partners and the agency. The projects, specifically the partners want to work in a community setting or across boundaries, and many times the agency is in a position that they have to work, at least initially, through their administrative boundaries, and this is clearly a finding that can't be changed from a structural standpoint due in part to the fact that forest is set up in districts, forests, and regions, but what the nonprofits told us is that the agency needs to understand that the nonprofits cannot be successful if they are limited by agency administrative boundaries. On the flip side, the nonprofits must realize that the pace and the depth of the agency's ability to support them is gonna always be constrained presently by resources. Ultimately, if the Forest Service wants a maximum benefit from their nonprofit partners, they need to begin to think about kind of aligning their administrative, at least functionality, not structure to begin to execute across boundaries. If you don't, you're not gonna get the execution at the scale that you want and potentially need, and as I said, you potentially will get the leverage of the partner resource that the agency could truly benefit from. And as you can imagine, we've got two nonprofit partners highlighted here. We've got the San Bernardino National Forest Association and the Continental Divide Trail alliance, and these are natural examples of the situation because at least the CDTA obviously works across this very expansive border, and as we talked to them they said we're beginning to realize that for us to be effective with the Forest Service we need to rethink about where our leadership is and how much we do at a national and how much we do at a regional level from a staffing standpoint.

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The San Bernardino National Forest Association talked about their OHC trail management program, and basically talked about how their volunteers are out there every day, they're seeing things across the laryngoscope, and in essence, they may have a much better vision and understanding of the needs, and when they go in and try to talk to the different district offices that they have to deal with, the ability to execute on that kind of comprehensive system of needs is sometimes stronger in one district than the other. And again, there's this constant balance of partners in front of agency or agency in front of partners or who's holding who back, but part of this is just raising the awareness of this issue so that you can have meaningful discussions about things like that. Chris, you wanna add?

The Continental Divide Trail Association talked about two things that strike me as very important. They talked about that their volunteers who do 70% of the work on the trail have intimate knowledge of the trail top to bottom, or I guess north to south, and that also they believe in building community by building a trail, and so these concepts are very, very difficult cuz they're big and global and they do encompass geography to relate to the district-level folks that they're working with because they're usually attached to a different world; not good, not bad, just different, and the challenges to try to figure out how to bring those two together.

The SBNFA I know well, and my friends, I love the SBNFA, and the OHC Volunteer Program is 17 years – well, 15 years old now and it's definitely one of the top models in the country and I just want to make a note that even though it is

great and wonderful, it's still a daily \_\_\_\_\_ how to make it work best, so that's just the kind of note about how what kind of span of time this work is to re-envision and re-invigorate and work top to bottom. It's a big task, so we can't expect immediate results, but it's worthy work. Thanks Margaret.

The next key finding is actually directly in line with what Lisa found in her research, and that is that the infrastructure doesn't support the volunteer program effectively. Obviously Lisa talked about it as it relates to the feedback from the agency side, and the partners stated this loud and clear. The first issue with granted agreements has been talked about, and it is very clear that the program may be working appropriately for its corporate perspective as far as the degree of accountability that it's required for a significant federal agency, but as far as the execution on the ground, it is problematic, and I think that the key issue I would say from the discussions here, and I was very excited to hear a lot of the creative ideas that came from Lisa's survey about how to deal with this, is that in order for this program to take it to the next level in any condition, this is a key issue that would have to be high on the priority list to make sure that the grants and agreements sides and perspectives are understood, but also the needs of both the field staff as well as the partners are fully understood and a better situation emerges. This has been a hindrance. The second thing, again, is the issuance of a repeating of what Lisa said, which is this issue with training. We heard very clearly that your partners want to be part of learning. They get the safety training, but they know that there is more talent in the Forest Service that could

be extended even in these work projects to training and developing them as professionals. It's interesting, and we're gonna talk about this a little later, but it's not just that the basic training is there. The real other gap is in fact the training for volunteer management, and that is a challenge both within the agency but also in the existing nonprofit world. The problem is that it is the same issue with this experiencing a project and becoming a steward, the learning about what makes this species important or why is this trail built this way or why are we doing monitoring of this water. You know, people are curious, and by giving them simple, short – I mean training doesn't always have to be considered, at least from the nonprofits' prospective partners, it doesn't have to be in depth. There's a lot of informal experiential training and discussions that they're looking to have. One of the things we talked about here is if in fact you don't spend the time on getting the infrastructure right for doing business with your partners or your opportunities for capacities for development are not maximized to the greatest extent. The issue with training is really you can't increase – you're losing opportunities to increase your capacity and commitment if you're not investing in the training. And again, training sometimes thinks major expense, major interaction. It can happen in very small ways. We got the volunteer for outdoor Colorado on this as an example. They've committed to, in order to build their organization making sure they have their outdoor training institute. It is focused on leadership develop, focused on training. It's the next level. It's not the volunteer, it's the people who are managing the volunteers. That's a great example. The Golden Gate national park Conservancy was another example of

what's called a park academy, and they basically recognize that their volunteers kind of want to be junior varsity rangers, and what are the botanist skills, what are the biologist skills, what are the curator skills that are out there. Now this does require staff time, but they've basically committed to creating curriculum from their own staff as experts because their volunteers are passionate about it. I'm gonna talk a little later about the Elliott County Museum of Arts, the docent model, but these are examples of why you need to face – the partners clearly said we need to get this organizational infrastructure issue clear, and we're really looking on deepening our relationship, and the other thing they talked about is why is it that we can't sometimes attend training that the agency is doing, and vice versa. They were very open, and that's one of the things that they were really curious and eager to discuss with the agency. Chris?

I just want to mention what struck me about volunteers for \_\_\_\_\_, Colorado is that - Hi Anne. I know you're on. It's that they really consider themselves, their competency to the outdoor stewardship, and so they are rigorously redesigning our organization, I would almost say constantly. They just finished a big \_\_\_\_\_ process, but they're actually trying to set in place the business model to produce that. they also feel – they talk about what they do is professionally building volunteer capacity, and when you talk about the Forest Service infrastructure and a partner like VOC, it begs the question of here's a nonprofit partner doing a lot of the seminal work that could be maybe shared with the Forest Service and applied. We learned a lot from them and we really believe that there are several

other major organizations pursuing this path of creating professionally managed volunteer programs. It would be who of the Forest Service infrastructure to work with and then learn from and be at the same table.

Thanks Chris. This last finding from the nonprofit partners again builds upon that which Lisa found, and basically the observation is that the leadership and commitment are currently missing. A sustainable volunteer program requires capacity building both within the Forest Service and with its partners, and to date the leadership hasn't matched their rhetoric with resources, and that's probably the key statement, and it was stated in a couple different ways, but ultimately people want to know what the agency expects from them as partners, and they're willing to advocate. What was fascinating with all the nonprofit partners is, and we've heard this in many initiatives is that the partners stand ready to help advocate for the importance of change and subtle resource allocation. I think the other issue is that they realize that this is not a world of unconstrained resources and that the best solution isn't necessarily for the Forest Service to create their own standalone volunteer management program. They're expecting that it's a shared responsibility and are looking to be able to be part of that process, and I think that the other issue is from a commitment standpoint. I think the preponderance of those of you who are on the phone today committed to this three-hour endeavor are the ones who are prepared to deal with partners at least from a passion standpoint. You may not be prepared from the hours of the day or the resources based upon some of this, obviously Lisa's research and the chat

questions, but in fairness, we also know that sometimes all the partners aren't really ready to engage, and so it really – this whole research and foundational work is bringing to light both the commitment that the partners are willing to make, and also their willingness to say look, you guys aren't ready to deal with this yet but we're ready to help you be there. Chris?

This is all about leadership, and I think everybody on knows that. The question is how to formulate a strategy that is safe to lead, that is well connected, the costs are understood. Things like that are important, so I think we need to work as a community of individuals and like Jim Apshire said to figure out a package that leadership can make a commitment to. Thanks Margaret.

We're now gonna shift gears. We're gonna shift gears to what we found out from the external nonprofits, and the key issue here is, and it was driven obviously by the nature of the question, but if there's not a strategy and if it doesn't exist from the top to the bottom, and there's not accountability, and oh by the way you can't have any – you can have strategy and accountability but you can also have that without resources, which we fully realize, but our objective was to be able to talk about this so we can deliver this message back to the agency, but you know, strategy and accountability are key. You know, as we look at the nonprofit community, again, those who are on the phone today obviously realize this, all nonprofits are facing challenges in their long-term sustainability. It's the successful ones who realize they need to be structured more as a business to

achieve their mission. That doesn't mean they have to work as a business but they have to be structured like a business, and for all intensive purposes, the Forest Service Agency is mission driven. It has a mission just like a nonprofit has a mission. As I said, the successful ones have strong strategic plans, and basically those strategic plans say that our mission shall be done through - a large part of the mission success will be through the execution of volunteers. If you think about that from a paradigm shift, if somebody woke up in the morning and said, you know, the preponderance of the Forest Service work in the future will be done with volunteers and the Forest Service agency will be the guiders in conjunction with our partners and our volunteers will be our stewards in partnership, that alone would be a very strategic statement. We also found out that basically once the strategy is in place if you talk to all the nonprofits that we talked about, there was very clear accountability for who has to do what in the execution of this. It goes back to those job descriptions, it gets back to the time allocated that's official, the budget set behind it, but it is clear that having the strategy from top to bottom, thinking about the execution of services to the public through volunteers requires a mindset of we're in a different world order and we can't do this by default we have to do it by design. Chris? Well the example I have here is the business volunteers for the arts, and Chris maybe you can talk a little bit about that as an example.

Arts has a very focused mission. They want to connect the business community and the private sector with the arts and communities across this country, and

they work on it in a very specific way. They actually have a feasibility study, or I'm sorry, an assessment, so they professionally had developed an assessment, they put it with an interested community, and it's a self-assessment, and so it's full of business practices and what you need to do to be successful, so before something is constituted at a local level, folks know if they're gonna be able to put it together and sustain it. So that's a really great example of putting a business model in place that the national organization working at a very local level - they are growing and they feel that they have to constantly involve also, constantly involve their model to meet the new trends and business interests and communities.

Chris, you wanna add anything else on strategies?

Well, I just want to say that – I just want to repeat what Margaret said cuz it's all about this. If you do not have a strategy supported with a plan that works at all levels and allows accountability for all levels, and accountability doesn't mean did you do your job but that there's a connection between the plan and the implementation on the ground. It's very hard to have a robust program, and this is what I would wish you would take away. We have a billion good ideas, but we lack this set of core strategies and a plan that attaches them to the ground so that people can perform and move forward and be successful. Thanks.

That's actually a good segue to something, probably one of my or our most inspirational discussions, and it was with the Girl Scouts. I know we've got Tim \_\_\_\_\_ on the phone and he works extensively with the Boy Scouts. The Girl Scouts is approaching 100 years in 2012. You as an agency approached that centennial in 2005. Basically they were seeing declines in their membership, their volunteer model was breaking down, the typical mom as a troop leader. They were seeing changes in the populations of girls who didn't know what girl scouting was, and basically they realized they were broken, and they committed to a significant development of a core business strategy for the 21st century. This is an organization that has 900,000 volunteers. Once you get out of the national office level it is a volunteer-driven organization, and basically they said when they went through their core business strategy they basically focused on six areas, and these areas were program delivery. How can our mission be achieved and delivered through our volunteers and what programs are we having. They looked at their government and their organizational structure at all levels. They looked at their funding. How are we gonna do this? They looked at their brand. They said how attractive are we. How do we compete for a volunteer's time amongst the plethora of other nonprofits out there? Why should some mother spend her time investing in her daughter? Then they looked at their culture. They looked at how their culture would or would not support change. They indicated that getting the high-bound mothers who were Girl Scouts out and getting them to think differently about how to do their job was a major issue. This really talks about the second bullet here that says if you can

get a 100-year-old organization to say we're broken with 900,000 volunteers and say let's look at this from top to bottom, and they hired an outside expert, they engaged in an extensive process. I mean this was not done in a year. This is gonna probably take five years to move the ship. They piloted ideas, and the key issue they said though at the end of the day is if we're gonna think about taking our – if we're gonna think about maintaining our 900,000 or even growing it, we don't have our legal, our financial, our communication and training infrastructures – if there's a breakdown in any of those we're never gonna make it, and so again, as the organization evaluates what it's gonna do and how it's gonna do it, this does not indicate that all these issues have to be done on the back of the Forest Service, but it basically says that all these issues have to be addressed.

The last two, the next one I'll say basically is that we found out that all of our nonprofits said that if they don't adapt they don't survive. I mean you and the natural resource understand how this works. You have endangered species management that you're responsible for. We heard very loud and clear that the changing nature of volunteers we say that we have to adapt our model. You know, volunteers do it for their reasons. We better be listening to what they want, and we need to be thinking about adapting our communication tools and our work methods to meet these new trends. We used the Earth Force as an example. For those of you who are aware of it, it is obviously targeted for use. The interesting thing that we heard from them is kids know how to network. Kids know how to do things. We need to give them some direction, we need to make

sure they're supported, but why aren't we leveraging the networking power of children, and I think the key issue here is it's a struggle but we cannot be using the same volunteer management strategies that we used a decade ago if we want to continue to throw this into the future. Chris, anything?

Yeah. Earth Force was started, as many of you know, by Pew Foundation. They put a lot of money into it to make it a national program, and that model didn't work for them, but they also reinvented themselves about six years ago to take on a very local presence. They only have presence in a few cities now, and they work deep within their schools and their community. They are very intentional. Their strategy is intentional and they're finding much success with partners and in bonding with other adults who are interested in helping students be successful in the environment. Not only in the environment but as future leaders.

This one actually is the exciting one. Chris, you want to go ahead and take this one from top to bottom?

This is one of my favorites, the Oregon Zoo, whose mission is helping everyone at the zoo who works there, whether they're paid or not, to help their community make a better life for animals in the world, and two major things I wanted to talk about today, there's so much, is the financing. This is a 27-million-dollar budget that the zoo has. It's a quasi county operation, but they don't get much money so they mostly feed themselves as a nonprofit, and of the 27 million dollars, 1 million

dollars goes to support the volunteer program, which by the way is one of 7 divisions in the zoo. It's basically a 20-year-old program. They work from top to bottom, but their financial commitment has evolved to recognize the value the volunteers play in the entire organization. Also, from a fundraising standpoint, they have two kinds of volunteers at the zoo. They have the doers and the fundraisers, and the doers help with interpretation, act as guides, and work with the animals, and they recently had an 8-million-dollar capital campaign going on to build a new exhibit, and for the first time they asked the doers if they might like to be involved in the fundraising effort, which they've never done before, which showed that even though something can be great there's always something new to adapt to, so the doer volunteers discussed it and decided that they would take on a fundraising role, and themselves within their own doer community raised over \$200,000 toward the goal. The interesting thing about that is that they found that they had a most amazing experience. As a team they were very tight and effective, but when they were asked to fundraise they found a new dimension and a new depth to their relationship to each other within their team, and so they are very changed by that experience and look forward now to being part of the fundraising and therefore the financing of the entire zoo. Very inspiring story there. If you ever get the chance, go visit them.

The other thing they're doing effectively is they've got a very innovative kind of cross-generational volunteer program, kids, families, and this woman, I think Chris, you told me the story, she was – it was one of her last days at work and

she committed to getting you the story so she passed on that legacy. It was very inspirational. I'll go back to the Girl Scouts in our concluding comments. It takes courage to seek the truth in order to change. As the Girl Scouts said, what struck me is if this was a 100-year organization and it was willing to turn around and do an internal self-evaluation, There is nothing that should theoretically stop our service from being able to do at least a rigorous self-evaluation, whether it can invest the resources that the Girl Scouts did in redeveloping the program is obviously a whole other issue, but I think the real issue, as we pass this off to Bill and Jim to enrich the closeout is that change can occur with rigorous self-evaluation and commitment. I think this webinar was designed to do this self-evaluation and this is a great foundation, and that really – the future is a choice, and that service delivery and lack of relevance potentially will occur if the agency is not willing to undertake a self-evaluation and consider changing the way it delivers services, and with that, Chris, do you want to add anything to that?

No. Just that 900,000-member volunteer force and they decided to change, and I think that's an inspiration.