



MONTGOMERY COUNTY DEPARTMENT OF ENVIRONMENTAL PROTECTION AND
INTERSTATE COMMISSION ON THE POTOMAC RIVER BASIN

Watershed Group Capacity Building Project Contract No. 1008926

Final Project Report

February 2014

Interstate Commission on the Potomac River Basin
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Communications, Watershed Group Products, Evaluation Summary

This report conforms to format specified in Article II, Section C *Reports and Submittals* of Watershed Group Capacity Building Contract No. 1008926.

EXECUTIVE SUMMARY

The Watershed Management Division (WMD) of the Montgomery County Department of Environmental Protection (DEP) is responsible for the stewardship of the County's water resources. This includes meeting the requirements of the third permit cycle of the National Pollutant Discharge Elimination System (NPDES) Municipal Separate Storm Sewer System (MS4) permit, received by the County on February 16, 2010. During the latest permitting cycle, a number of Montgomery County watershed groups expressed the desire to assist DEP in implementing the NPDES requirements. Some watershed groups also requested capacity-building assistance from DEP to improve their ability to meet their watershed protection and restoration goals. As these activities corresponded with the public outreach and educational requirements of the MS4 permit, on June 23, 2011, DEP entered into a Watershed Group Capacity Building contract with the Interstate Commission on the Potomac River Basin (ICPRB) to provide services to strengthen community-based watershed groups within the Potomac drainage in Montgomery County and to assist the groups in supporting the County's MS-4 requirements.

Since the Capacity Building Project's inception, the following nine watershed groups have participated to varying degrees in its activities — the Eyes of Paint Branch, Friends of Sligo Creek, Friends of Cabin John Creek, Little Falls Watershed Alliance, Neighbors of Northwest Branch, Seneca Creek Watershed Partners, Muddy Branch Alliance, Rock Creek Conservancy, and Watts Branch Alliance. These organizations range from ones with lengthy histories in local watershed issues to newly formed groups still in the process of defining their missions and goals.

EARLY ACCOMPLISHMENTS

The Capacity Building Project's early accomplishments — from June 2011 through May 2013 — are documented in the *Watershed Group Capacity Building Project Contract No. 1008926 Mid Project Report*, July 2012. During this period, the Capacity Building Project efforts were two-pronged. Advancing the groups' abilities to conduct community education and outreach activities, the Capacity Building Project provided a train-the-trainer conservation landscape workshop, coordinated two RainScapes conservation landscape installations, conducted storm-drain mapping, and supported the application of about 400 storm-drain markers. In the area of organizational development, project staff guided the groups in defining needed areas for further training and growth. This included providing scholarships for group representatives to attend the 2011 Chesapeake Watershed Forum, as well as an in-depth group self assessment, the River Network's Organizational Status Report Survey. Major outcomes included improved rapport and strengthened lines of communication between the groups and DEP, revitalized interest around support for water protection as related to the MS4 requirements, and identification of needed capacity building skills. In essence, these accomplishments laid the foundation for the latter undertakings of the Capacity Building Project, which are covered in the present final report.

FOCUS ON STRUCTURAL CAPACITY BUILDING

DEP and ICPRB entered the second phase of the Capacity Building Project with the goal of providing events and trainings that would address the most common organizational needs of the watershed groups as defined by the groups themselves. Relying on the River Network Survey results, intermittent evaluations, and verbal input, the Project planned a winter social event for all the watershed groups to be followed by two capacity-building trainings on the subjects of strategic planning and/or public outreach.

WINTER SOCIAL

A Winter Social, held in January, 2013, provided the opportunity for groups to celebrate their accomplishments and network with the members of other groups and DEP and ICPRB staff in an informal setting. Two board members were invited from each of the nine previously mentioned watershed groups. The social was well received with 10 representatives from 8 watershed groups attending. Group presentations were held, during which each group shared their achievements, plans for 2013, and their concerns. Representatives from other groups responded with support, ideas and suggested resources. Although the group presentations and the ensuing discussions left little time for the planned informal activities, the participants were receptive to future events that would bring together Montgomery County's watershed groups for social networking, recognition, or recreation. The Capacity Building Project viewed the Social as particularly valuable in that it promoted communication and interaction among the groups and triggered each group to consider its goals for 2013. The event also set the stage for the Project's upcoming strategic planning training and DEP spring events.

The fact that members of eight groups attended this Winter Social was a mark of the importance of events that celebrate and recognize the achievements of volunteer organizations. The participants who completed evaluations of the Winter Social appreciated the opportunity to meet and interact with representatives from other groups, even though most had expected a more informal gathering. For future events such as this, it is recommended that planning begin months in advance and involve representatives from each group, to meet the varied expectations and schedules of the groups.

STRATEGIC PLANNING TRAINING

The remainder of the Capacity Building Project focused on Strategic Planning training – with the goal that each participating organization would develop a strategic or annual plan. A professional consultant experienced in working with a range of watershed groups was contracted to deliver a strategic planning training program. To meet the watershed groups' varying needs, the training was designed to begin with a three-hour workshop on the tenets of strategic planning to be followed by one-hour consultations for each organization. The workshop, attended by board members from six watershed groups, began with a presentation on the benefits of strategic planning. This proved useful to participants who came from boards whose other members saw little value in planning. Participants also received planning tools that could be used to assess and plan their activities, resources, and organization's goals in a connected and comprehensive manner. These tools, particularly one called the Impact Map, guided the ensuing planning processes. The success of the training program lay in this two-step approach; the consultations, held within two months of the workshop, provided the opportunity for each group to put the information and tools from the workshop into practice and to receive guidance on their issues and goals in relation to the planning process.

During this training, two organizations made significant progress – one drafting a near-final strategic plan and another identifying its group's visions, activities and resources. Understandably, some participants still had a tentative grasp on the steps involved in planning, and some were unable to envision how a plan could address the immediate issues of their organization. At this point, DEP and ICPRB weighed the value of providing a second training on a different topic (as had been planned) or in providing a second strategic planning consultation. The experience of the strategic planning workshop made it apparent that for *any* training to produce significant results, follow-up would be needed. Participant surveys showed that three groups wanted a second consultation on strategic planning consultation, two were not ready for any type of training, and the sixth group would finalize its draft plan on its own. Considering these responses, as well as the role a strategic plan can play in boosting a group's capacity to meet its goals, DEP and ICPRB opted to provide a second strategic planning consultation for the three interested organizations, rather than a different workshop.

The second set of consultations was held in November 2014. Building upon previous discussions, the trainer helped two more groups write basic annual plans, which included areas of work, such as education and advocacy, a targeted number of events, and benchmarks with dates and numbers. Another organization revised its Impact Map and vision statement and drafted a comprehensive strategic plan.

STRATEGIC PLANNING TRAINING OUTCOMES

Overall, the strategic planning training and follow-up consultations proved to be highly successful in that:

- Two groups completed draft strategic plans (with targeted completion dates in early 2014).
- One group developed an annual plan of activities.
- One group developed its first draft annual plan, which its president planned to use to launch further board discussions on the organization's goals.
- One group completed an Impact Map to be presented to other board members in the hopes of engaging other members in strategic planning.
- A new group began to identify visions, activities, and concrete steps to involve other board members and recruit more volunteers.

The success of this training lay in having an introductory workshop followed by individual group consultations and in the trainers' flexibility in meeting the needs of groups at different organizational levels. While the first workshop gave board members an understanding of the tenets of strategic planning, it is unlikely most groups could have moved forward with concrete plans without further guidance, particularly since the participants had numerous questions and the groups had differing interests and challenges. Additionally, many board members initially considered strategic planning a low priority, a view which changed over the course of the training. In three groups the process created a synergistic effect; by their second consultations, additional members had joined the process and committed to an annual process of planning and evaluation. Without a doubt, the catalyst came from having access to an outside expert, who could assist them in moving beyond "wordsmithing," as one board member put it, and in applying planning principles to what had seemed to some as insurmountable organizational hurdles.

RECOMMENDATIONS

During the Capacity Building Project, watershed group members noted the following preferences:

- Continued support from DEP, including regular attendance at board meetings or events.
- Events and trainings that provide the opportunities to interact with other groups, as well as individualized assistance.
- Guidance on implementing plans.

During the strategic planning training, it grew apparent that all the involved groups face the challenge of incorporating new volunteers. This corresponds with the top three areas of needed skills identified on the River Network Survey and on surveys given after each event and consultation, which were:

- Communication skills, outreach, and marketing
- Volunteer recruitment and management
- Board development

Further training in these areas could enhance the organizations' capacities to support water quality goals. Based on the experiences of this program, future training programs are likely to be most effective if they:

- Involve a leadership team of two to four members from each group,
- Provide short multi-group workshops, followed by dedicated time with each group,
- Require that participating groups commit to action items throughout the training, and
- are led by an experienced outside consultant with the ability to address the needs of groups at varying stages of development.

PROJECT ELEMENTS

This Final Report covers activities conducted from July 2012 through January 2014, as defined in Subtasks A.1 and A.7 of the Watershed Group Capacity Building Contract:

A.1. Support up to nine watershed groups to include arranging and/or coordinating training workshops, seminars, events, fieldtrips and meetings. This involves:

a) Organize up to 2 training programs/workshops for watershed group participants on 1) Strategic Planning and 2) Community Engagement and/or Marketing.

b) Coordinate, organize, and facilitate 1 capacity-building event, determined from input of watershed groups and in consultation with DEP.

A.7 Provide a Technical Memorandum covering scope of work of this Contract for entire contract, to include an Executive Summary covering project details, assessments, evaluations and associated products.

One program under this contract, the Pet Waste Pilot Project (Subtask A.6) will be summarized in a separate report after the Pilot's completion in July 2014.

During the Capacity Building Project, DEP and ICPRB staff held monthly or bi-monthly meetings and consultations to select, plan, and evaluate capacity-building workshops.

Previously completed subtasks and deliverables are covered in the *Watershed Group Capacity Building Project Contract No. 1008926 Mid Project Report*, July 2012.

SUBTASK A.1 SUPPORT FOR TRAINING, SEMINARS, EVENTS

2013 WINTER SOCIAL

The Winter Social, held January, 2013, at in the Rockville Library, had multiple goals. The idea was sparked by watershed group members who informed DEP representatives they wanted a social event, such as a fall picnic, during which members of Montgomery County's watershed groups could mingle and network. DEP and ICPRB also viewed the social as an opportunity for the groups to celebrate and share their accomplishments and to begin formulating their goals for 2014. It was hoped this would build enthusiasm for creating 2013 work plans. Because a new ICPRB staff person joined the project in November 2012, the event also afforded the opportunity to introduce her to the groups. Lastly, the event was seen as a jump-off for upcoming trainings to be provided by the Capacity Building project during 2013.

Related materials for the Winter Social can be found in Appendix A.

PLANNING

Nine watershed groups were invited to send two participants to the social. Three email polls with the groups were needed to set an amenable date and location. To promote social interaction among the members of the different groups, many of whom had never met, DEP and ICPRB planned group ice-breaker games, a watershed-model activity, and a dessert potluck, along with 5-minute presentations by each group. The groups were asked to focus their presentations on their 2012 accomplishments and 2013 goals. DEP provided a suggested template for their presentations. To ensure a high level of participation, ICPRB emailed multiple reminders.

EVENT SUMMARY

Ten representatives from eight watershed groups attended: Friends of Cabin John Creek, Friends of Sligo Creek, Little Falls Watershed Alliance, Muddy Branch Alliance, Neighbors of Northwest Branch, Rock Creek Conservancy, and Seneca Creek Watershed Partners. Ryan Zerbe, DEP, was unable to attend personally and interacted with the group through Skype. Ana Arriaza and Leslie Wilcox attended for DEP and Rebecca Wolf, ICPRB, facilitated.

After an introductory game, each group presented their accomplishments and goals. The presentations required stricter time enforcement, as some talks went past the time limit, leaving little opportunity for the planned social activities or mingling. However, the extended presentations were not without benefits. During them, members of the different groups participated in an active exchange of information, asking questions and offering input and resources concerning the other groups' challenges and goals.

EVENT EVALUATION AND RECOMMENDATIONS

The social event provided many desired outcomes, in that it --

- enabled groups to celebrate their accomplishments
- provided the impetus for groups to set annual goals
- familiarized individuals with new resources
- introduced the groups' members to each other and to the new DEP and ICPRB staff members who would be working with them in the upcoming months.

Due to time limitations, the evaluation was sent to participants the day after the event. Ideally, time would have allowed for everyone to complete an evaluation before leaving the event. Four returned the surveys and one wrote comments in an email. Of the four who completed the evaluations, all were amenable to

similar opportunities in the future. They particularly enjoyed the opportunity to interact with representatives from other groups, but they had different expectations and responses to the activities. One felt the event met expectations; the others envisioned a more informal gathering. One especially liked the games; another did not. One enjoyed the presentations; another did not. The respondent who emailed comments suggested a simpler agenda and that such future events either be social *or* organizational in nature. The varying responses are not surprising, given the different motivations and interests of the groups.

Despite the varying responses, the fact that eight groups sent representatives to the Winter Social was, in itself, a mark of the importance of events that celebrate and recognize the achievements of volunteer organizations. Such events also enable individuals from different groups to establish rapport, exchange information and ideas, and experience a sense of camaraderie in their endeavors. This becomes essential when many different watershed groups work within a large watershed and political jurisdiction. However, to meet the expectations of multiple groups and volunteers, it is recommended that representatives from the each group be involved throughout the planning process to set the program's goals, agenda, theme, and location and dates.

STRATEGIC PLANNING WORKSHOP

BACKGROUND AND PLANNING

From the outset, the Capacity Building Project aimed to provide up to two organizational capacity building training programs. To target the most beneficial training topics, DEP and ICPRB staff reviewed the watershed groups' responses from the River Network's Organizational Status Report Survey. Of the many identified topics, several fell under the category of public outreach and engagement. Another block of responses were related to organizational structure and functions. This included strategic planning, fund raising and board development. The DEP liaison who had worked closely with the watershed groups throughout the Capacity Building Project observed that only one group, the Rock Creek Conservancy, had developed a strategic plan. Because a strategic plan or an annual work plan provides a comprehensive framework for a group's activities in the near and long term, it was decided to offer Strategic Planning as the first training and Public Outreach as the second.

The goal behind strategic planning training was for each group to complete a strategic or annual plan. A workshop would need to sell the benefits of strategic planning, cover its basic premises, and provide planning tools. DEP and ICPRB staff also recognized that for the planning process to move forward — and to keep moving — multiple board members would need to be committed to the process, and individualized guidance would need to be provided. Hence, the training involved a workshop on the basics with a follow-up consultation for each group. To participate, each group agreed to send a minimum of two members to the workshop, to work on a set of "next steps" before their consultation, and to participate in the consultation.

To obtain a professional trainer, Requests for Proposals were sent to six consulting practices, all with extensive experience in strategic planning. Three organizations submitted proposals, and one was selected based on set criteria.

Prior to the workshop, the Consultant provided participants with *How Organizations Build a Culture of Planning*. This article and other supporting workshop materials are in Appendix B.

WORKSHOP SYNOPSIS

Twenty representatives from six watershed groups — Little Falls Watershed Alliance, Friends of Cabin John Creek, Muddy Branch Alliance, Neighbors of Northwest Branch, Seneca Creek Watershed Partnership, and Watts Branch Watershed Alliance— attended the June Strategic Planning Workshop.

PRESENTATION

The Benefits of Strategic Planning

The Consultant began his presentation by stressing that whether an organization is young or old, a strategic plan sets the stage for results that can be reaped even 10 to 15 years in the future. He presented a Strategy Mountain diagram (Appendix B), depicting three elements of strategic planning – organizational, programmatic, and operational. The focus of the workshop would be on *programmatic strategies* that “identify and implement appropriate programs and activities that achieve outcomes for target audiences.”



Workshop participants discussed how planning leads to stronger organizations. Following are the participant comments:

- Goals enable groups to measure, demonstrate and celebrate accomplishments.
- Measureable goals and results help with fundraising.
- Goals help organizations prioritize, for instance, to attract “mid-level” volunteers.
- Short, medium, and long-term goals can be set.
- A strategic plan provides a framework for heirs of the organization (new leaders). New leaders know what to expect. One benefit of bringing in new leaders is that it can lead to a reduction in “founder burnout.”
- Groups are better able to coordinate activities.
- Plans move organizations towards sustainability.
- Having a strategic plan promotes public trust of the organization, and with clearly stated missions, organizations can be recognized as authorities on certain subjects.

The Consultant recommended the participants initiate similar discussions on the benefits of strategic planning with their respective board members and volunteers before starting the planning process.

The Planning Process

A three-step planning process was presented: 1) planning to plan, 2) assessment and 3) plan development and implementation. Participants shared ideas on each aspect. The highlights follow.

1. Planning to Plan
 - Identify and engage the leaders who will be involved
 - Be clear on everyone’s time commitment to the process
 - Assess the organization’s capabilities
 - Discuss what the planning process will involve.
2. Assessment
 - Look at the organization’s *Strengths, Weakness, Opportunities and Threats*
 - Get feedback from board and volunteers

- Assess current goals.
3. Plan Development and Implementation
- Gather information
 - Align interests with goals
 - Rank goals
 - Decide whether to use a facilitator
 - Form teams to implement the who, what, when, and where
 - Target activities
 - Identify needs, such as supplies or administrative needs
 - Set benchmarks to measure and keep the process going.

GROUP ACTIVITIES

Tools for Developing a Strategic Plan

The Consultant presented an Impact Map and described how it can be used to guide planning. The exercise focused on enabling participants to visually depict how their organizations can use their resources in activities that will achieve goals directly related to their desired impacts or visions. Participants worked with members of their organization to complete the exercise, but several desired more assistance with the activity.



Group Action Plans

The last workshop activity involved the completion of an “action plan” to help the groups prepare for their consultations. Each group identified two or three key issues, preplanning activities, and two next steps. Four groups completed action plans.

Resources (group assets)	Activities (core strategies)	Enabling Conditions (goals or expected results)	Vision Statement (desired impact or ultimate result of efforts)
<i>Examples:</i> Large, active member base. Diversified funding. Specialized expertise.	<i>Examples:</i> Advocacy Research Education Land Protection	<i>Examples:</i> Government officials who support policies that restore and protect the Bay. Educated public committed to action in support of the Bay.	<i>Examples:</i> A healthful and sustainable Bay ecosystem.

An Abbreviated Impact Map: workshop participants used this table to define and connect their resources, activities, enabling conditions with their vision.

WORKSHOP EVALUATION

Fourteen of 20 participants (70%) answered the workshop evaluation.

- Thirteen of 14 rated the workshop as effective (64.3%) or highly effective (28.6%).
- The most beneficial aspects to participants were the strategic planning overview, the Impact Mapping, and the action planning exercise. Respondents said the discussion on the value of strategic planning would help them approach other board members to work on a strategic plan. The Impact Map helped some view their goals differently.
- Several participants valued the group discussions, whereas others felt more time was needed to cover all the topics well.
- All respondents reported an improvement in their level of knowledge about strategic planning – 14.3% highly improved, 71.4% improved, and 14.3% somewhat improved.
- Many said they would attempt use the Impact Maps to involve more board members in planning.

SUMMARY AND RECOMMENDATIONS

This workshop provided an effective launching point for groups to begin the strategic planning process. At least two board members attended from each watershed group, with the Seneca Creek Watershed Partners having 7 participants. This level of involvement enabled the group members to discuss workshop content in relation to their own organizations and to return to their organizations with greater knowledge of and more commitment to the process. Although only four of the six groups completed action plans at the workshop, all agreed to participate in the one-hour follow-up consultations with the Consultant.

The only noted issues were related to time constraints. Some participants left with many questions, particularly about using the Impact Map. A longer workshop might have allowed more time for questions and individualized attention; however, during the planning process for this workshop, potential participants were unwilling to commit to a longer workshop. Another option that would provide more individualized attention would be to provide an assistant for the consultant during the workshop.

Additional Resources

The Consultant also recommended the book [The Nonprofit Strategy Revolution](#) by David La Piana. Additional free resources on capacity building are provided on the following website (<http://www.icl.org/>).

STRATEGIC PLANNING CONSULTATION ONE

Each group involved in the June strategic planning workshop participated in a one-hour follow-up consultation in July or August, 2013. The consultations were vital for a successful training program, being that each group had different challenges and levels of readiness. After the workshop, the participants received multiple emails, answering questions raised on their workshop evaluations, arranging consultations, and encouraging them to complete their agreed-upon action steps before the consultation. Synopses of the consultations follow.

Associated materials for Consultation One are provided in Appendix C.

LITTLE FALLS WATERSHED ASSOCIATION (LFWA) CONSULTATION — JULY 2013

Attendees:

Dan Dozier, LFWA, Co-President
Sarah Morse, LFWA Co-President
Lynnwood Andrews, LFWA Vice President
Maurie Kathan, LFWA, Acting Secretary
Mikel Moore, LFWA
Suzanne Richman, LFWA Board
Leslie Wilcox, Montgomery County Department of Environmental Protection
Rebecca Wolf, Interstate Commission on the Potomac River Basin

LFWA UPDATE AND MEMBERS' CONCERNS

LFWA reported that they had made no progress on their strategic plan since the June workshop and that they had discussed their mission at their previous four board meetings without coming to agreement on a written statement. The members believed they were in general agreement on their mission and that their consultation would be better spent on other topics.

The Consultant asked each board member mention what they wanted to focus on. Their responses included board burnout, lack of agreement on plans or how to move forward, and the need for new board members.

The Consultant suggested that LFWA could create a simple work plan for the next 12-18 months. Then, after having some successful projects to energize people, the group could work on a more developed plan. LFWA members noted they already have well-attended weekly, monthly and annual events with about 100 volunteers coming to 4 or 5 events. Instead, they saw the organization's issues as:

- Use of funds
- Bringing volunteers into the organization and onto the board
- Addressing where the groups wants to be in 18 months and how to get there
- Deciding whether they should expend effort in making a plan aimed at getting new members or to just going ahead and bring in new people
- The need for more visibility
- Determining the types of board members that are needed.

FOCUS ON VOLUNTEER PLAN

The Consultant suggested focusing the session on how to bring volunteers into the organization over the next 18 months. Although the group has many volunteers and a large email list, it would be beneficial to strategize on ways to incorporate volunteers into the organization and, ultimately, up the "ladder" to become board members. The group agreed it would be helpful if they had small jobs that would involve volunteers beyond one-day events. They had briefly tried to adopt committees, but that did not evolve to include people other than the current board members.

Leadership Mountain

The Consultant introduced ICL's Leadership Mountain *pyramid* concept, used to build membership. Drawing a triangle, which he divided into horizontal sections, he noted that the wide base represented events that attract new and short-term volunteers. At the next higher level of the pyramid volunteers are involved in helping on organizational aspects of the event. Going up the levels of the pyramid, volunteers take on greater leadership roles. At the apex, volunteers become board members.

Although LFWA has repeat volunteers, the organization is at the "regular event level" in which the volunteers participate in the one-time event. To move volunteers up the pyramid, the Consultant stressed the following:

- The board needs to decide what volunteers can do regularly and then develop clear job descriptions with specific time limits.
- Collect contact information at all events and then call all of the volunteers within a few weeks to ask if they want to take on a specific activity, such as helping organize an event.
- Initially, current board members would make these follow-up calls or emails; later new participants could step into that role.

The group discussed introductory volunteer jobs, including the following possibilities:

- Greeter at events, who thanks volunteers, collects names, provides information
- Make follow-up phone calls

One participant noted her own experience as a volunteer of moving through the pyramid in a different watershed organization. She had started by volunteering to do a sign-up sheet. Because the organization had structured meetings and structured campaigns, they incorporated her in a campaign separate from their board activities. From there it was "baby steps up" to chairing that campaign and then becoming the board chairperson. The Consultant noted it was likely the organization had the pyramid structure in place and had identified specific volunteer activities at each level of the pyramid.

Volunteer Roles

The Consultant suggested that LFWA look at their current events and determine what regular activities, or roles, could be fulfilled by new people. He advised --

- Keeping it simple – start with 5 different volunteer roles.
- Considering the types of leadership roles volunteers could ultimately move into.

LFWA has a number of regular work areas, all led by board members – invasive plant removal, trash pick-up, stormwater, education, political advocacy, volunteer coordinator. The Consultant suggested they *create volunteer jobs under each of these action areas*. The group's brainstorming of volunteer jobs included the following:

- *Trash Pickups*: Ask a frequent volunteer to coordinate the event. LFWA would first list the activities involved and incorporate them into a job description for trash pickup coordinator.
- *Invasive Removal*: People must be certified as Weed Warriors through Montgomery County to lead invasive plant removal on MNCPPC property. The group discussed the following ideas:
 - Encouraging volunteers to become Weed Warriors and adopt their own areas.
 - Engage volunteers in a training on how to identify plants.
 - Determine things needing to be done that do not require Weed Warrior training, such as checking areas in need of weeding, setting up the event, listing removals on the website, calling volunteers to thank them.
- *Volunteer Coordinator*: Board members mentioned the possibility of a paid volunteer coordinator or neighborhood coordinators. The consultant responded that these were good ideas for further down the road, but that the group presently needs to build the infrastructure for volunteers.

When asked about how to successfully recruit volunteers, the consultant noted the following factors which have been successful for other organizations:

- *Personal invitation*. People are more likely to volunteer if they get a personal invite, rather than an email.
- *Clear job descriptions & volunteer expectations*. Individuals are more likely to volunteer if they know exactly what they are being asked to do and the time commitment.
- *Motivation* – People have various motivations for volunteering, including social aspects, passion about a particular issue, and political advocacy. A volunteer's motivation(s) may not be known at first but having segmented and defined job descriptions can make it easier for the volunteer to understand their role within the organization. Announcing volunteer opportunities at events, advertising volunteer opportunities for families, and following up with repeat volunteers are also effective ways of filling specific capacities or jobs within the organization.

NEXT STEPS FOR LFWA

The following suggested next steps were noted during the meeting and recorded by LFWA:

- Identify up to five volunteer roles for each committee. The role should include a short job description and include the time commitment.
- Identify regular event attendees from the database and then contact the attendees by phone or email to learn if they are interested in taking on a specific role.
- In doing this, determine what needs to be done by the full board and what could be done by a subcommittee.

Before leaving, the group agreed to brainstorm about roles and for each member to develop at least one volunteer role by their September 2013 board meeting.

SUMMARY AND EVALUATION

Although the consultation veered from the topic of strategic planning, it helped the LFWA's board members perceive how to use planning tools to work towards resolving their primary issue – board member burnout. The explanation of the volunteer pyramid and volunteer roles helped members understand how to “raise people up the organization” through a process of planning related to their major project areas.

Five of six members answered the consultation evaluation survey. They found the consultation helpful in moving them forward in their planning, particularly because it convinced more board members of the importance of strategic planning and focused the members on specific steps. Their individual goals for the completion of a strategic plan ranged from 2014 to 2015.

Resources on Volunteer Recruitment Suggested by the Consultant for LFWA:

- River Network's website
- Institute for Conservation Leadership, www.icl.org
- Energize.com

NEIGHBORS OF THE NORTHWEST BRANCH CONSULTATION (NNWB) — AUGUST 2013

Attendees:

Anne Ambler, President

James Graham, Board Member

Anna Arriaza, Montgomery County Department of Environmental Protection

Rebecca Wolf, Interstate Commission on the Potomac River Basin

Consultant and Facilitator: Peter Lane, Institute for Conservation Leadership (ICL)

NNWB UPDATE

At the beginning of the consultation, the NNWB handed out its draft strategic plan, brochure, and draft Impact Map for discussion. In looking at the draft plan, the consultant noted it was important to use metrics to quantify their objectives, for instance, adding how many volunteers would be desired for certain positions by a certain time. NNWB will incorporate metrics. The Consultant praised the draft after briefly looking at it and said he would send the NNWB president specific comments after the consultation.

VOLUNTEER RECRUITMENT

The remainder of the consultation was open to other issues of concern to NNWB. The NNWB members are concerned about expanding their active membership and discussed many workable tactics for reaching new audiences and incorporating new people into active roles. The president felt that if they could focus more time and thought into expanding their volunteer base, they could have great success.

Using the Leadership Mountain concept, the Consultant outlined how NNWB could structure their activities to incorporate volunteers step by step up the organization. To engage volunteers beyond a one-day event, he suggested the board:

- Decide on three activities that fit within the NNWB's goals that could be handled by new volunteers. In doing so, include a title, job description, and time commitment.
- Make personal follow-up requests. People are more likely to respond if asked directly or by phone, rather than by email.
- Make specific requests, rather than open-ended ones.

NNWB members have found that many people will not answer their phones or share their phone numbers. The group came up with two ideas to work around this hurdle:

- Leave a thank you message on their phones with a request to volunteer again for a specific task.
- Write personal emails to volunteers with such information.

NNWB also noted that more outreach was needed for new audiences, such as schools and churches. They asked what other approaches were successful.

The Consultant suggested the option of working through their board members' personal networks or starting with the neighborhoods near streams and inviting people to a specific activity. The following recruitment tactics also were discussed:

- Using the six-degrees-of-contact strategy and ask all the board members to share their contacts. Invite those contacts to participate.
- Handing out "calling cards" at their events to encourage people to look at their website and the volunteer activities on it.
- Posting events at local colleges or with the Montgomery County Volunteer Center.
- Asking the board members who lead specific projects to identify volunteer jobs. Such information could be passed out at an event. Alternately, those board members could identify volunteers on their teams who might want to branch into other geographic or topic areas.

CONCLUDING THOUGHTS AND NEXT STEPS FOR NNWB

The NNWB's president will incorporate the Consultant's suggestions into their draft strategic plan. Their board will provide feedback to the draft plan at their September 2013 meeting.

The two NNWB members rated the consultation as "useful" or "very useful" and valued the specific input on their questions. They did not feel another consultation was needed and identified January 2014 as the goal for completing their strategic plan.

MUDDY BRANCH ALLIANCE CONSULTATION (MBA) — AUGUST 2013

Attendees:

Paul Hlavinka, President, MBA

Jennie Howland, Vice President, MBA

Eileen Conley (MBA), Secretary

Dennis O'Keefe, Member

Leah Miller, Treasurer

Ana Arriaza, Montgomery County Department of Environmental Protection

Rebecca Wolf, Interstate Commission on the Potomac River Basin

MBA UPDATE

MBA members described their progress in the planning process:

- They were halfway done with the Impact Map and planned to continue identifying activities on it.
- They sent a draft vision statement to their members for review. Ten people responded, and one wrote an edited vision statement, which the board adopted: *The Muddy Branch Alliance's vision is for the surrounding streams, lakes, forests and parks to be teaming with life, safe for families, pets and wildlife to enjoy and to have a community connected to preserving the area's intrinsic beauty.*

MBA focused their consultation on the following topics:

- How to link their current operational plan with their listed activities (on the Impact Map).
- How to better focus the activities — currently, they add new activities onto the operational plan as new volunteers join with different interests.

THE MBA OPERATIONAL PLAN

The MBA FY13 Operational Plan (January, 6, 2013) was distributed for discussion. The Consultant noted that the operational plan provided an excellent basis for a strategic plan with one exception — it did not include internal capacity building (how to grow their infrastructure). The four programmatic priorities listed in the plan — Stewardship, Build Awareness, Education to Affect Change, and Advocacy and goals — were effective. The following suggestions were made to move toward a strategic plan.

- Add a timeframe.
- Utilize the Impact Map to decide on priorities.
- Use the strategic plan guide decisions about activities.
- Add internal goals about fundraising, infrastructure.

Enabling Conditions and Prioritizing Activities

The group revisited the enabling conditions on their Impact Map to ensure they linked with their goals. Most of the enabling conditions were linked with education, advocacy, and stewardship. The consultant suggested reviewing the fourth enabling condition, “People, groups, and governments change their behaviors to improve water health,” under which they had listed a large number of activities. He suggested MBA determine which efforts would have the greatest impact. The following Impact Map exercise could be used to help prioritize activities:

1. List each of the four priorities or goals in the activities column on the map.
2. Under each, list main activities and draw a line to the enabling condition(s) impacted by the activities.
3. In doing so, they might notice that many lines connect to one enabling condition and few to others. If so, they could determine what activities can be done to support the other enabling conditions. They also need to determine if their group has the resources to accomplish all the activities; if not, they can decide which ones should be done now or in the future.

BUILDING ORGANIZATIONAL EFFECTIVENESS

One of the goals listed in MBA’s Operational Plan is to build organizational effectiveness and sustainability. The Consultant asked how the group planned to build their volunteer base. Although MBA’s events are well attended, its members have questions about how to proceed in recruiting people.

Showing MBA the Leadership Mountain diagram, the consultant described how they could use the pyramid to frame a plan for incorporating more active members. He made the following points:

- Determine roles or jobs for volunteers.
- Develop descriptions of three or four roles volunteers could assume. Be clear about what is being asked and about the time commitment.
- Collect contact information at all events and follow-up by contacting new people to see if they want to do one of these tasks.

In relation to their strategic plan, the Consultant noted the importance of incorporating internal goals, such as volunteer recruitment, fundraising, and board building. Their existing goals could be improved by setting benchmarks, such as attracting a specific number of volunteers or having a specific number of events.

SUMMARY AND NEXT STEPS FOR MBA

The members planned to continue using the impact map to connect planned activities with enabling conditions. They will integrate the results into the operational plan.

Rather than involving all board members in planning, one member assumed leadership for the plan and another volunteered to assist. Their goal is to complete the strategic plan by early to mid-January 2014. This committee will solicit feedback from board members during the process and then present the plan for final discussion at a January board meeting.

In their evaluations of the consultation, three of the five attendees found the session very helpful and wanted to participate in another strategic planning consultation. One commented that having outside help enabled them to concentrate on specifics and move beyond editing. Another felt a one-hour consultation was stressful, even though useful. Additional examples of strategic plans were requested, and after the workshop the Rock Creek Conservancy plan and Neighbors of Northwest Branch draft plan were provided to MBA.

WATTS BRANCH WATERSHED ALLIANCE (WBWA) CONSULTATION – AUGUST 2013

Attendees:

Annita Seckinger, Watts Branch Watershed Alliance President & Founder
Leslie Wilcox, Montgomery County Department of Environmental Protection
Rebecca Wolf, Interstate Commission on the Potomac River Basin

WBWA ORGANIZATIONAL UPDATE

Two WBWA board members had attended the June Strategic Planning Workshop. The president attended this consultation and started the session by describing the organization and its goals. The organization began about one year ago and has an informal board of four people. It maintains a Facebook page and works closely with the Muddy Branch Alliance (MBA) and the Seneca Creek Watershed Partners, as the organizations' watersheds are adjacent. The MBA mentored them over the past year.

The group's primary goal is the reduction of sediment in the Watts Branch. The stream empties into the WSSC water treatment plant, which supplies about 80% of Montgomery County's drinking water, and sediment has been an issue at the plant. The president has observed storm drainage pipes going from homes directly to the stream banks, causing erosion. She wants to do public education and outreach about erosion, sedimentation, and residential impacts and solutions. A secondary goal is to bring attention to the rich heritage of long-term environmental documentation of the Watts Branch done by Luna Leopold.

DISCUSSION ON INCORPORATING NEW VOLUNTEERS

The consultant noted the importance of getting more people involved, so that the group could accomplish more activities. Additionally, for the success of the group, it will be important to enlist other board members to lead activities or carry out organizational matters. The Consultant remarked that developing an organization is more like a marathon than a sprint and that founding members face the dangers of over-extension and burnout. A leader's biggest task or role is to get other people to be leaders.

The Consultant described the Leadership Mountain pyramid. The introductory level involves easy-to-organize events that attract many volunteers. This could be stream cleanups with an educational component. A pool of more regular volunteers – those attending two or more times a year – will develop. Some will want to become more involved in the organization and can be offered roles or jobs. This process can be started by asking the current board members to identify regular roles they want filled and

volunteers who could be approached to take on those roles. Because their group is young, the new volunteers could move quickly from being a regular volunteer to being a board member.

The WBWA president mentioned her visions for activities and volunteers:

- A series of walks on the Watts Branch
- Getting the younger generation involved and getting younger people on the board
- Bringing in a more diverse population of volunteers.

A discussion ensued on methods for involving young and diverse members or volunteers:

- Offering Student Service Learning (SSL) hours through a school's SSL coordinator. Thomas S. Wootton High School has the Muddy Branch and Watts Branch next to it. The Montgomery County Volunteer Center has training for organizations wanting to offer SSL hours.
- Montgomery Community College would provide opportunities to reach older students.
- Partner with organizations serving populations of different cultural backgrounds to create rapport with the groups.

CONCLUDING THOUGHTS AND NEXT STEPS FOR WBWA

The president rated the consultation as highly useful, particularly because it helped her envision how to proceed. WBWA does not have a timeline for developing a strategic plan, but the President established the following priorities:

- Address incorporation with the board
- Determine board member roles and responsibilities to better share the organizational work load and commitment.
- Identify one or two events that could be done regularly to attract people. This would include invasive weed removal every other month.
- For the future, focus on the schools.

SENECA CREEK WATERSHED PARTNERS CONSULTATION (SCWP) — AUGUST 2013

Attendees:

Kent Shaw, SCWP Treasurer

Margaret Schoap, SCWP Secretary

Ann Smith, SCWP President

Ryan Zerbe, Montgomery County Department of Environmental Protection

Rebecca Wolf, Interstate Commission on the Potomac River Basin

SCWP ORGANIZATIONAL UPDATE

The consultation commenced with SCWP members describing their history and status.

- The group began in 2008. In the fall of 2012 they held a stakeholders meeting, and about 30 people from the community attended. Ann Smith became president in 2012. The board consists of 11 members, who actively lead separate projects.
- SCWP received support from the Muddy Branch Alliance (MBA) to become established. They continue to do a joint calendar with MBA.
- Generally, SCWP posts watershed-related activities of other organizations and partners with other organizations whose events are in the Seneca Creek Watershed. Their primary independent activities are stream trash pickups done in alliance with the Alice Ferguson Foundation.

- In June 2013, seven SCWP board members attended the Strategic Planning Workshop. Afterwards, the board members provided input about their visions for the organization by email. They have yet to discuss the vision statements as a group. The vision statements were brought to the consultation.

DISCUSSION CONCERNING ORGANIZATIONAL STRUCTURE

The Consultant addressed several organizational challenges relevant to SCWP and other new organizations. While supporting other organizations enables their members to learn what other groups are doing in the watershed, it also is necessary to build their organizational identity. If the group predominantly advertises the events of other organizations, they will tend to become a clearinghouse, rather than an organization that can address watershed issues and attract new members. He also cautioned that as an organization grows, it can be spread too thin to accomplish its goals if individual members continue doing separate activities.

The group has considered these issues, but has not yet determined which direction to pursue or how to bring more cohesiveness to the group. They are exploring having members report on their individual projects.

The Consultant reiterated the importance of an organization having a balance between members doing their own projects and having group-sponsored activities. As a group grows, internal pressures can develop regarding how different activities fit within an overall mission for the watershed and how resources are being used. Often, the question arises, “Could we have a greater impact if we focused our resources on one or two activities as opposed to six or seven?” It would be helpful for SCWP to consider how its resources can have a measureable impact on Seneca Creek.

Thus far, SCWP has worked under the premise of allowing new members to pursue their passions. The Consultant noted that while it often makes sense to go where the energy is, for an organization to grow, its members need to consider how to use their passions to bring new members into the organization. For instance, if a board member is working on invasive removal but not developing active members at the same time, the invasive removal could simply end if that person leaves the organization. To ensure volunteer activities are integral to the organization, team leaders could consider incorporating volunteers as active members. One could also look at it from a geographic viewpoint. For example, the invasive plant leader could help start an invasive removal team in a different neighborhood of the watershed.

ORGANIZATION BUILDING AND STRUCTURE

The Consultant presented the Leadership Mountain concept as a strategy for drawing people into and up the organization. He proposed that the organization encourage volunteers to undertake defined volunteer positions with the goal of them assuming leadership positions over time. The group noted they have highly qualified board members, who would like to run events, but that they do not have the volunteers. Usually, when they work on an event with another organization, the other organization gets the list of volunteers.

The discussion returned to the issue of the type of organization its members want SCWP to be. A key question for SCWP to address will be whether it will be a volunteer clearinghouse or a watershed organizations that defines what needs to be done – for example, putting in rain gardens and doing public education and advocacy. In the latter model, SCWP would run events and recruit volunteers for it. While in agreement about their group’s current activities, the board members currently have differing ideas about which way to move forward. It was suggested that holding discussions on their group identify and direction would be valuable at this point.

In reviewing the vision statements written by the board members, the Consultant noted that one board member wanted to see “continued expansion of their membership with a goal of having active members in

every subwatershed, eventually forming taskforces or committees to tackle issues in the watershed.” He pointed out that this vision differs from enlisting volunteers to help in the disparate activities of other organizations.

SCWP members agreed that such discussions about their visions and direction could be fruitful at this time. They suggested the following steps:

- A board meeting to discuss their visions and goals for the organization.
- Developing a calendar of SCWP events.
- More frequent or regular board meetings to discuss articles of incorporation, membership, financial situation, insurance issues.

Possible Group Events to Reach New Volunteers

SCWP board members feel confident about their organization’s mission. They believe SCWP could be a stronger tool, if they had more members. They discussed possible events that would not conflict with current activities and could get their organization’s name out in the public. These included:

- A series of hikes and stream walks for the public and other groups interested in water conservation
- Trash pickups
- Canoeing
- Writing articles about events
- Meadow habitat protection
- Tree planting

It was discussed that easy events, such a trash pick-ups or educational hikes, can be ways of bringing in new volunteers and building towards activities that have more impact on the watershed. The new pool of volunteers could be invited to show up at a meeting, to write letters, to participate in a restoration activity, or to take on specific roles.

SCWP noted that last year’s stakeholders meeting, which had been open to the community, was well attended. The members agreed to hold another meeting in November, at which they could present their accomplishments, as well as upcoming projects and volunteer opportunities.

CONCLUDING THOUGHTS AND NEXT STEPS FOR SCWP

SCWP will plan several events and have a second annual stakeholders meeting in November 2013. At the meeting, they will report their efforts over the past year and present events for which community members can volunteer. They might consider an October activity. They also will continue working on obtaining their 501c3 status, insurance, and other related organizational tasks.

Two of the three participants completed the evaluation. They felt it was helpful, and one felt a second consultation could be useful. There was no consensus on when they foresaw completing an annual or strategic plan.

FRIENDS OF CABIN JOHN CREEK CONSULTATION —AUGUST 2013

Attendees:

Mike Northridge, Vice President for Outreach

Dan Kulpinski, Treasurer

Ryan Zerbe, Montgomery County Department of Environmental Protection

Rebecca Wolf, Interstate Commission on the Potomac River Basin

ORGANIZATIONAL UPDATE

Two board members of the Friends of Cabin John Creek (FOCJC) attended the June strategic planning workshop. At that time they expressed concerns that the other FOCJC board members were uninterested in attending or pursuing a strategic plan. Still, at the end of the workshop, they agreed to present what they learned about strategic planning and a draft Impact Map at the next FOCJC board meeting in September. After the workshop, the two board members continued working on the Impact Map. They brought a draft to the consultation, desiring suggestions on how to best present strategic planning and the Impact Map to their board.

TACTICS FOR INVOLVING BOARD MEMBERS IN PLANNING

The Consultant suggested that if it is unrealistic to get the entire board involved in the planning process, they could consider asking specific questions to help the group set priorities. The important questions to ask the board are:

- “What are we going to be doing in the next year or in the next two years?”
- “What can people commit to?”

The Consultant suggested they could assess possible activities by using criteria, such as:

- What is most important to do?
- What do we have the capacity to do?
- Who wants to do the activities?

Both members said they want to get their 501C3, and they need to raise the funds for that. Someone in their organization volunteered to lead fundraising for this. The Consultant noted that the 501C3 relates to internal organizational goals. The first rule in fundraising is to determine what the funds will support; before raising funds, they need to do activities in the watershed.

POSSIBLE ACTIVITIES IN 2014

The session next focused on FOCJC’s desired accomplishments for the next year. The members listed the following:

- More cleanups
- More cooperation concerning a consent decree with WSSC to get more money for restoration for their watershed.
- Partnering on conservation landscape projects.

Criteria for Selecting Activities

The Consultant suggested the members consider activities in a way that will build their organization. The activities attract volunteers. They can collect volunteer information and advance new people into roles, such as cleanup team leaders. FOCJC might have to do an activity several times before identifying regular volunteers who can be approached for more involvement. FOCJC members agreed it would be valuable to track volunteer participation and job duties.

Another criterion for choosing activities could be that the activities can be replicated easily. The Consultant reiterated that it is important to do events two to three times to build the volunteer pool. The volunteer pool needs to be continually built. The group listed several possible events that could work well:

- Stenciling, especially when done by neighborhood.
- Making connections by partnering on events
- Educational hikes

They also could consider staggering meetings – having a board meeting and then an activity or informational meeting. It was noted that this has worked well for other watershed organizations.

Board Meeting Preparations

The Consultant asked how the two board members would introduce the Impact Map to the board. They planned on giving the board an explanation with a blank Impact Map. The Consultant made the following suggestions to encourage their board to think in the long term, rather than just about their present activities:

- Introduce the tool as a way to determine what they'd like to do next year.
- Suggest the group prioritize the activities and assess how they fit in over time.
- Ensure that the activities listed on the Impact Map relate to the enabling conditions.
- Encourage members to think in terms of what activities will lead to future activities.

It was pointed out that fundraising is not on the Impact Map. The Impact Map is a tool to create a one-to-two-year plan. The plan should also include fundraising and resource development.

The board members asked for copies of other groups' strategic plans. (After the consultation they were provided plans from the Rock Creek Conservancy and Neighbors of Northwest Branch with the permission of those groups.)

FOCJC CONCLUDING THOUGHTS AND NEXT STEPS

Both FOCJC members felt the consultation would help them in planning for their next board meeting, when they would try to get their board to agree to plan for the next year. They will present their draft Impact Map, rather than trying to get the entire board to go through the exercise. They hope to complete a "basic" plan this fall.

In their evaluations, one participant rated the consultation as "somewhat helpful." Both indicated it helped them prepare for the next board meeting. One member desired another consultation; the other believed it necessary to learn the board's responses before another consultation.

STRATEGIC PLANNING CONSULTATION TWO – NOVEMBER 2013

Initially, DEP and ICPRB planned on providing two different workshops, one on strategic planning and another on outreach or methods for reaching new audiences and volunteers. Upon the completion of the strategic planning consultations in August, 2013, DEP and ICPRB staff met to determine the best course of action. They considered the groups' questionnaire responses, their progress on their plans, and the type of training that could be most fruitful in the remaining time left in the Capacity Building Project contract. After the workshop, ten participants had expressed interest in outreach training, nine desired training on volunteer engagement, and five wanted a second consultation on strategic planning. However, by the end of the consultation, only one group, the Neighbors of Northwest Branch, had a draft plan. The Muddy Branch Alliance had made appreciable progress, but the other groups were still in the beginning stages of planning. DEP and ICPRB believed that plans were needed to guide the groups' efforts to expand. Agreeing that another strategic planning consultation could keep the planning process moving forward, DEP and ICPRB invited three groups to participate in a second follow-up consultation. The selection of these groups was based on their stated interests and readiness. They were:

- Muddy Branch Alliance (MBA)
- Little Falls Watershed Alliance (LFWA)
- Seneca Creek Watershed Partners (SCWP)

Following are synopses of each group's consultation. Other related materials for Consultation Two are located in Appendix D.

MUDDY BRANCH ALLIANCE CONSULTATION TWO – NOVEMBER 2013

Attendees:

Paul Hlavinka, Muddy Branch Alliance (MBA) President
Jennie Howland, MBA Vice President
Meredith Strider, MBA Board Member
Cynthia Pansing, MBA Board Member
Alex Zaneddin, MBA Board Member
Ana Arriaza, Montgomery County Department of Environmental Protection
Rebecca Wolf, Interstate Commission on the Potomac River Basin

MBA UPDATE

At MBA's first consultation in August, one board member had committed to leading the development of their strategic plan. She circulated a vision statement survey among board members and active members for their input and worked with other board members on the Impact Map. Prior to their second consultation, the MBA board members and the Consultant were provided with the updated Impact Map. MBA asked that the second consultation focus on the following:

- Refining or streamlining their mission statement.
- Listing activities on the Impact Map –that would help “achieve the enabling conditions needed to achieve our vision.”
- Determining Operational Priorities for 2014.
- Defining next steps.

REFINING MBA'S MISSION STATEMENT

A board member with professional experience in strategic planning brought an edited mission statement to the consultation for discussion. The edits were done with the intent of making the statement more succinct

and in alignment with MBA's new vision statement. The group discussed suggested wording that improved clarity for the public and agreed to send the edited statement to the board for approval.

FOCUSING RESOURCES

To frame the discussion on resources, the Consultant posed the following questions:

- Which conditions do your current activities most directly support?
- Is this where you want to focus your time and resources?
- What, if any, changes might you want to make in the future?

The Consultant noted it was an opportune time to use their Impact Map to ask, *"Is this how we want to focus resources?"* By drawing lines from the Enabling Conditions to their related Activities on the map, they could determine if the use of resources was correct for MBA. For instance, if a condition was connected to only one activity, they could consider whether more activities were needed. On MBA's Impact Map, the condition of an "engaged public" was linked with many activities, and the group felt this was consistent with their near-term goals.

SETTING 2014 PRIORITIES

In developing their operational plan, MBA based their priorities on their perceptions of the types activities that engage people. They believe people will join educational and easy activities, which could ultimately lead to advocacy. They consider near-term activities as easier and advocacy as being at a higher level. In the upcoming year, MBA has several priorities – the Rachel Carson Elementary School garden (and how to reproduce it at other schools), the Interfaith Workshop, and improved trail marking, but their board also wants to learn how to engage more people and how to incorporate new ideas raised by new volunteers.

To finalize their strategic plan, the Consultant suggested:

- Synchronize their Impact Map with their Operational Plan by putting Impact Map activities under the appropriate sections of the Operational Plan.
- Decide on two or three measureable accomplishments, using qualitative and quantitative benchmarks. This would help focus their energy for the year. They could use the Activities & Enabling Conditions to determine these accomplishments.
- Determine which new activities to undertake by assessing how the activity relates to MBA's impact map.
- Connect their operational plan to their mission and vision.
- At the end of the year review their goals and the articulate what they want to be different.

CONCLUDING THOUGHTS AND NEXT STEPS

All participants rated the second consultation as "very helpful." The session provided the impetus and guidance to move MBA closer to a plan that will guide their future activities, as evidenced by the following.

- Three board members stepped into the strategic planning process after the first consultation; their insights and assistance were welcomed by the other board members.
- The group envisions concluding the strategic plan by March 2014, and one member offered to take a leadership role in conducting annual planning and evaluation.

LITTLE FALLS WATERSHED ASSOCIATION (LFWA) CONSULTATION TWO – NOVEMBER 2013

Attendees:

Ms. Sarah Morse, Little Falls Watershed Association (LFWA) Executive Director

Lynnwood Andrews, LFWA Vice President
Sara S. Robinson, LFWA Secretary
Maurie Kathan, LFWA Treasurer
Mikel Moore, LFWA Board Member
Leslie Wilcox, Montgomery County Department of Environmental Protection
Rebecca Wolf, Interstate Commission on the Potomac River Basin

LFWA UPDATE

After LFWA's first consultation in July, its board members actively pursued solutions to their self-identified problem of "founder burnout." They contracted the Consultant for an additional meeting in September to discuss their issues and took the major step of hiring a part-time Executive Director.

At this consultation, members expressed the need to regroup and coast after the big changes their group had undergone in the previous two months. Some were concerned about re-creating the same issue – too many separate projects handled by too few members. They also need to learn how to guide the activities of an executive director. Currently, LFWA also has an intern, who works one day a week and is looking for a grant for membership software. As they want to bring in more active members, they like Rock Creek Conservancy's example of hiring someone to bring in new volunteers through stream programs.

The Consultant suggested thinking of this period as a pilot – a period during which they are getting their systems in place. They can take small steps to get their infrastructure in place. When doubts were mentioned, the Consultant suggested looking at the volunteer pyramid again.

EVENTS FOR RAISING VOLUNTEERS

After revisiting the concept of "raising volunteers" up the organization, the group discussed possible events that could involve the public and create a pool of potential volunteers.

- Storm-drain marking event in April or May
- Volunteer Appreciation Party. After it was mentioned that some community members have participated in as many as 8 events, the Consultant suggested that a volunteer appreciation party could also be part of a strategy to identify a higher level of volunteers. The group continued brainstorming on aspects of such an event.

The Consultant suggested the group identify the next year's events and volunteers. LFWA identified 3 activities that could be used to identify volunteers and incorporate them into the organization:

- A volunteer recognition event
- Alice Ferguson Trash-Free clean-ups
- Labeling storm drains.

Roles for Volunteers

The group next considered what roles volunteers could undertake. The Consultant suggested identifying roles for a specific activity, having specific time commitments, and using job titles, such as crew leader, volunteer coordinator, or letter writer. MBA discussed the following ideas:

- Asking a volunteer to post signs in five places or the newspaper.
- Calling volunteers to invite them to give input at their annual meeting.
- Giving volunteer certificates at the annual meeting.
- Organizing family events that are focused on using the park.

The Consultant noted that there is a trend of seeing volunteerism as a way to get families out and involve all the family members as potential volunteers.

Weed Warrior Discussion

The group's certified Weed Warrior Leader is moving to a different state in the near future. The members briefly discussed how to build a volunteer base and potential Weed Warrior leaders. Ideas included having their new office intern enlist students or school clubs from Walt Whitman High School and Bethesda Chevy Chase High School or having a volunteer training program in conjunction with Montgomery County.

LFWA'S NEXT STEPS AND CONCLUDING THOUGHTS

The group summarized activities for 2014:

- A volunteer appreciation event
- Establish new volunteer crew leaders for Alice Ferguson through advance planning
- Organize a group of volunteers for Weed Warrior Training (will need to approach County's leaders)
- Family recreational event – also could involve mid-level volunteers in organizing
- Storm drain labeling
- Outreach to schools.

The Consultant's final comments: Currently, the group has activities led by individual members. Planning group activities that bring in volunteers and build their infrastructure would help resolve their organizational issues.

The LFWA's members indicated that the workshops and consultations were helpful, especially in that they prompted the board to focus on developing the next level of stewardship volunteers. They had started to take a more structured approach in planning activities. Group members are not ready to develop a strategic plan, but now see the value of planning and tying their activities to organizational goals, such as increased membership, rather than holding many disparate activities.

The day after the meeting The Consultant sent the following email to the group.

I hope last night was helpful.... I do think some of the steps you identified to engaging more people are important...as well as creating even a basic "strategic plan." The plan may be more about the next 12-18 months and a page or so in length.

LFWA response:

.... your idea of doing a pilot was great and made the outreach to faith-based organizations totally doable in my mind. We have gotten a lot out of these meetings even if it doesn't seem like it. For me the most important thing is that the other board members are hearing it and are on board now.

SENECA CREEK WATERSHED PARTNERS (SCWP) CONSULTATION TWO — NOVEMBER 2013

Attendees:

Ann Smith, President, Seneca Creek Watershed Partners (SCWP)
Leslie Wilcox, Montgomery County Department of Environmental Protection
Rebecca Wolf, Interstate Commission on the Potomac River Basin

SCWP UPDATE

After SCWP's August consultation, the group decided to hold a community stakeholders meeting in November and to work on improving communication among its members. Members want to track their hours and projects and to communicate this with the rest of the group. The group also received its papers of incorporation, enabling it to open a bank account. SCWP has yet to discuss the vision statements submitted by each member. The president believes that SCWP is still at the stage of "molding the clay," rather than developing a plan. The Consultant suggested doing an outline to give them guidance as a first step towards planning – starting with the short and long-term vision.

VISION STATEMENT

The concept of a vision statement was not fully comprehended by SCWP members. The Consultant noted that a vision should represent the group's desired impact, such as a restored and healthy Seneca Creek. He agreed to email more examples of vision statements to SCWP.

In looking at the members' inputs for the vision statement, the Consultant noted they tended to be goals for three categories of work – *education, outreach, and protection*. He suggested making goals of activities SCWP wants to do next year in each of these areas. A goal could be as simple as, "In the next year we want to participate in five events that involve educating the public." This would make the group more proactive.

The SCWP suggested the following events and activities:

- Water Summit in March, either speaking or having a booth (education and outreach)
- Trash pickups with Alice Ferguson in April (protection)
- Montgomery County Fair DEP booth (outreach)
- GIS map with activities and events (a committee to study the possibilities over the next six months)
- Invasive Plant Removal

The Consultant suggested making an outline of a plan to initiate further board discussion. The following was developed:

Vision

County government and residents plan in terms of watershed health.

Mission (How we do it)

To educate and promote the value of the watershed and its recreational value.

Areas (steps to take)

1. Education
 - At least five events in 2014
 - GIS analysis and determine activities by next stakeholder meeting
2. Recreation – Organize three activities per year
3. Watershed Protection
 - Clean-ups (at least two per year)
 - Invasive Removal (at least two per year)
4. Advocacy
 - Attend planning/board meetings
 - Get people to write letters
5. Organization
 - Recruit two new board members
 - Start membership
 - Collect names and start a database

CONCLUDING THOUGHTS AND NEXT STEPS

The SCWP president rated this second consultation as "very helpful," but noted it could have been better if their group had not been preparing for their stakeholders meeting. SCWP's goal for completing a strategic plan is 2015.

SUMMARY AND RECOMMENDATIONS FROM STRATEGIC PLANNING TRAINING

The strategic planning workshop and follow-up consultations were the heart of the Capacity Building Project's efforts from November 2012 through November 2013. Although the initial goal was for all participating groups to complete an annual or strategic plan, the training was considered successful. Two groups completed draft strategic plans with the intention of finalizing their plans in early 2014; two groups that participated in a second consultation left with draft plans for further board discussion; a fifth group was continuing to work on its Impact Map; and the sixth group was undertaking steps to formalize its board, using input from the consultation.

Much of the success of this training lay in the format – one workshop followed by individual group consultations – and in the trainers' flexibility in addressing groups with different levels of organization. The workshop gave participants an understanding of short- and long-term benefits of planning and provided effective tools to focus their efforts. While workshop participants valued the interaction with other groups, they also needed and wanted individual attention.

During the first follow-up consultation, the Consultant targeted issues that were holding back the planning process for each group. Because almost all of the groups were concerned about bringing in new members, he presented a conceptual model for building membership and guided them to include activities in their plans for bringing in new volunteers. By the first consult, the Neighbors of Northwest Branch had prepared a draft strategic plan and foresaw completing the final plan by early 2014. The other groups established "next steps," which ranged from making presentations to their boards on strategic planning to identifying group activities for their organization. The participants indicated the workshop and consultation had provided new understanding of the strategic planning process, but it was apparent that most required further individualized support.

In that respect, the second strategic planning consultation was key in helping the three participating organizations move forward with planning.

- For MBA, the planning process had a synergistic affect among its board members. By the second consultation, additional members had joined the process. One even offered to assume leadership for yearly updates. Part of the reason for MBA's success can be attributed to their pre-existing operational plan, which formed the basis of their strategic plan. Another part was having a board member who accepted leadership of the process. This person solicited input for specific aspects of the plan through email "polls," ensured progress between consultations, and informed the trainer of the points MBA needed to address during their consultations. All this enabled MBA to make significant progress at each session. MBA will complete a strategic plan by February 2014.
- LFWA needed suggestions on concrete steps it could take to address membership burnout. The consultations seemed to invigorate the group, and by the second consultation, LFWA had taken the important step of hiring a part-time Executive Director and intern. During the second consultation, they continued to air concerns about the need for new members; with direction, they developed a draft annual plan that includes activities intended to address this challenge.
- For SCWP, the second consultation helped its president define a draft plan that could help the organization move beyond its current "clearinghouse" role. The organization is still in the process of defining its vision, and will benefit from further guidance from DEP.

RECOMMENDATIONS

The strategic planning training revealed that all the boards needed a deeper understanding of how to use strategic planning and how to establish activities that strengthen their organizations while meeting their

visions. Based on the results of the Capacity Building project and the preferences given by the watershed organizations participating in the project, it is recommended that DEP consider:

- Providing follow-up guidance on how to implement and evaluate strategic and annual plans. After the groups have completed their strategic or annual plans, a survey of their progress in implementing them could point to specific areas of concern that might need to be addressed through another workshop or consultation.
- Offering continued support to the organizations through regular communication and attendance at board meetings.
- Providing opportunities for the different watershed groups to interact and share their experiences, lessons learned, and plans.
- Offering training related to public outreach and membership expansion, using a format that includes basic instruction and individualized assistance in developing outreach or membership plans that fit within their strategic plans.