

The SAF Northwest Office

Letting it Work For You

***SAF PNW Leadership Conference
DuPont, WA***

February 6, 2016

Lori Rasor

Manager/Editor SAF Northwest Office



Purpose of Presentation

- Provide some background on why a regional structure is important in the Northwest
- Describe the workings of the Northwest Office and a snapshot of services
- Outline a few keys to success and some challenges
- Provide a few insights on how to make the most of your SAF leadership tenure
- Answer your questions



SAF Provides a Vital Role in Holding Together A Diverse Discipline with Diverse Objectives

- Professional foresters and natural resource managers work:
 - At every scale from DNA to biomes
 - For landowners from industrial forestry to NIPF landowners to city government
 - Considering everything from fish, forest fires, taxes, and hiking trails.
 - In every setting from remote and expansive forests to street trees and urban parks.



SAF is Relevant

- SAF provides the backbone that unites foresters across disciplines and management objectives, and brings scientific and professional recognition to our field of endeavor.



SAF is Rewarding

- There are the tangible, meaningful, and significant things that SAF can contribute to if volunteers and members are free to pursue those.

But...

- SAF requires an organized, hierarchical structure to function effectively. That requires member diligence on reports, budgets, tracking membership, elections, meetings, and other tasks.

Forester Realities

- Foresters typically live and work in rural areas.
- We are scattered across the country, making it difficult to organize and exchange ideas.
- Chapters are often small and dispersed, lack the critical mass to have regular and meaningful meetings, and are challenged to coordinate with other levels in a hierarchical organization.

SAF Realities

- Turnover in SAF leadership is frequent, members/leaders have other jobs so the business and deadlines of SAF work is unfamiliar to members, thus “onerous.”
- So, time and energy that could go into creative activities and programs is often instead spent on bureaucracy (and who needs that?).



Organizational Structure Matters

- Organizing at the regional level makes the nuts and bolts “bureaucracy” of SAF easy, freeing member time up for meaningful project work.

The Thesis Is...

- Organizing at regional levels can provide significant time savings making meaningful work within SAF easier to accomplish. A regional structure also increases the sense of connection and common purpose between foresters.

SAFNWO History and Governance

- Established in 1965 by the Oregon and Washington State Societies to provide services and support to SAF units.
- Inland Empire and Alaska SAF joined as full members in 2012.
- Governing body is the Northwest Office Committee:
 - Chair, chair-elect, treasurer and member-at-large from all four state societies + rotating committee chair



Who We Serve

How Many Members?

State Society Membership for 2016

	2016 #	2016 %
Oregon	867	50%
Washington State	554	32%
Inland Empire	205	12%
Alaska	112	6%
	1,738	100%

Organizational Structure

- Located at the World Forestry Center since 1985.
- Northwest Office staff are employees of the Forestry Center.
- Current staffing levels:
 - Part-time admin support
Amanda Mattern, 15 hours/week
 - Part-time editorial and professional support
Lori Rasor, 20 hours/week
 - Both provide services to other organizations.
- NWO Committee contracts with Forestry Center for staffing



Organizational Structure

- Guiding document: Administrative Policies and Procedures
- Four Appendices
 - Internal Financial Review Procedures
 - Conducted annually by Finance Subcommittee
 - Work Plan that is developed by our Northwest Office Committee
 - Operating Reserve Fund Policy
 - Northwest Office Committee Structure

The Work Plan

- Work plan sets staff direction for the year and is based on local priorities.
- It is a rolling plan updated annually.
- Five strategic outcomes and supporting strategies and tactics:
 1. Internal Communications
 2. Membership and Diversity
 3. Professional Education (Western Forester and workshops)
 4. External Communications
 5. Operations and Finances
- Work plan drives our budget.

The Core

- Support SAF units (members, chapters, state societies, standing committees) to be more effective and efficient.
- A source for one-stop SAF shopping and stable point of contact for members and the public.
- With continuous turnover of volunteer leadership, paid staff provides organizational memory and continuity, which can save leaders lots of time, confusion, and frustration.



Some Examples of What We Do

- Keep you organized: Develop SAF Action Calendar and Membership Recruitment and Retention Timeline (handouts available).
- Succession planning! Encourage leaders to think ahead.
- Coordinate online balloting for state societies.
- Provide full-service registration services to annual meeting committees – for a fee.
- Develop workshops with SAF units and partners.
- Provide Leadership Conference assistance.
- Assist with membership and communications plans.



Some Examples of What We Do

- Provide Constant Contact and FlashAlert Newswire services and train members on these systems.
- Access to historical documents? Need a budget example or sample fundraising letter or a new member welcome letter? We can help.
- Oversee the regional website at www.forestry.org with our regional website coordinator and state webmasters.
- Send Membership Update to SAF leaders.
- Publish five issues of the Western Forester per year.
- Attend executive committee meetings and annual meetings.
- Answer your questions and help trouble shoot.



Western Forester

- Published 5 times per year.
- Each issue focuses on a specific theme.
- Themes are determined by members.
- Focused on local issues and provides opportunities for the exchange of ideas and viewpoints.
- Provides the office with visibility and a technical aspect.



There is a cost for these services!

- Approved 2016 annual budget:
 - \$116,751 in revenues
 - \$128,000 in expenses
 - -\$11,249 deficit
- 2015 Ending Fund Balance: \$31,045

There is a cost for these services!

- Operating Revenues: \$73,500
- Major revenue sources:
 - State Society Assessments from OSAF, WSSAF, IESAF, AKSAF @ \$22/member (52% or \$38,267)
 - WF and Web Advertising (32% or \$23,250)
 - Registration Services (8% or \$6,100) – 5 conferences
 - Contributions (3% or \$2,000)

Cost of Services

Where does the money go?

- Operating Expenses: \$86,850
- Major expense items
 - Contract Services—personnel and accounting (57% or \$49,500)
 - Western Forester—graphic design, printing, mailing house and postage (18% or \$15,650 w/o personnel)
 - Rent (7% or \$6,180)
 - Supplies/Equipment (5% or \$4,500)
 - Registration Services (4.5% or \$3,935)



Cost of Services

- More on budget later!



Why it Works: Keys to Success

- Sharing Resources: Partner with like-minded organizations to cost share staff, equipment, office space, and more. Our players:
 - World Forestry Center: Assumes all employee risks, provides benefits, retirement, and vacation leave for Lori and Amanda
 - Western Forestry and Conservation Association: Share office space and administrative services person (Amanda)
 - SAF National Office: Lori contracted for services

Organizations maintain a full-time presence and response capability, but are only charged for time actually worked.



Why it Works: Keys to Success

- Four state societies cooperating together:
 - Committed to the concept and support staff
 - Networking and collaboration on common goals spurs innovation:
 - Leadership Conference
 - www.forestry.org
 - Forum for Communications and Membership Ideas
 - Tribal Perspectives Conference: Four-state effort
 - Other Projects (Policy Hot Issues): We all know each other
 - Structure makes it “feel real”
 - Western Forester: Tangible, local, and members can contribute.



Why it Works: Keys to Success

- We focus efforts on what we are good at:
 - Customer Service and Availability is #1
 - SAF Knowledge and History
 - Communicator and Facilitator Role: We see the big picture and can help connect the dots
 - Meeting management: A needed service
 - Little to no bureaucracy

Challenges – Funding Realities

- General budget concepts:
 - 52% of our revenue comes from member assessments
 - The \$22 assessment has been in effect since 2009.
 - State dues are \$30/member -- \$22 goes to the Northwest Office as an assessment, regardless of membership type
 - Golden members and students don't pay state dues (a national policy), so they are subsidized by the state societies:
 - WSSAF and IESAF: ~25% of members fall within these categories.
 - OSAF is 19% and Alaska is 11%.
 - In Oregon, it takes 105% of current dues revenue to cover assessments



Challenges – Funding Realities

- Expenses are bare-bones and personnel and rent will increase; committee reluctant to cut services, thus we need to close the gap...
- Increase Non-dues Revenue
 - Advertising: Have capacity to increase by 8K/year
 - Four-state plan to increase advertising initiated
 - Conference Management: Two models:
 - \$20-\$25/head = break even
 - Split proceeds 50/50 or by some other formula = \$\$
 - Contributions – we compete against each other
 - Ideas?

The National Partnership

- 18 months into a contract between the WFC and SAF National for Lori to assist in national level programs from a local perspective.
- Work focuses in Member Services area
- 12 hours per week
- Findings:
 - Immensely helpful to understand national-level programs and policies

The National Partnership

- Findings:
 - Bi-weekly+ interaction with staff valuable.
 - National staff better understands local-level issues and vice versa.
 - More connected: direct lines of communication
 - Access to staff expertise is key.
 - Our regional infrastructure provides for consistency in delivery of services.
 - From both a personal and professional perspective, this opportunity has exceeded expectations.

The National Partnership

- Example Projects
 - SAF Business Manager's Group Formed: 8 business managers from around the nation meet quarterly to share practices, successes, and challenges.
 - Testimonials of Northwest members for various membership and publicity purposes.
 - Developing an SAF Chapter Success Kit and BMPs.
 - How you can help: Grassroots ideas on what to include is needed.



Testimonials

Some Observations:

Set Yourself Up for Success

- SAF 101: Know the Basics so You are Prepared:
 - Understand SAF Structure from the member
 - Familiarize yourself with membership categories and benefits
 - Have a good working knowledge of SAF budgets and how they interact.
 - Know key SAF deadlines: SAF Action Calendar
 - Develop your SAF elevator speech: Why is SAF important to you and why should someone join SAF?



Some Observations

- Pay Attention – to everything:
 - Read, watch, listen, and ask questions as you go about your SAF work. Know who the key players are.
 - Pick up tips from others at meetings: Emulate leadership styles that would work for you. We can learn from one another.
 - Read the Forestry Source, especially the leadership column. Did you all read President Seely's article in the January issue that outlines key initiatives and goals for the year?
 - Chapter chairs: Attend state executive committee meetings, you are a voting member, and you will more connected at the state level.



Set Yourself Up for Success

- Communicate, Communicate, and Communicate some more!
- How? Pick those that will work best for you.
 - Email
 - Constant Contact
 - Website
 - Social Media—all chapters have Facebook capabilities.
 - Phone

Set Yourself Up for Success

- Communicate, Communicate, and Communicate some more!
 - Talk to new and existing SAF members and make sure they are integrated into your chapter. There is a place for members of all types and abilities.
 - Know your chapter demographics
 - Are there projects members might be interested in that you might not be aware of? H4H? Woodcut? Social activity? Have members been asked lately?
 - Tell your story: We do all sorts of cool stuff. Share it on Facebook, in articles for SAF publications, and on the website. Put your chapter in for a state award.



Set Yourself Up for Success

- Utilize the Website to archive key documents:
 - Can't find your bylaws? Once you've located them, put them on the website.
 - Update state standing committee pages: Trixy Moser added a section to the Foresters' Fund page that shows recently awarded grants.
 - Update state awards regularly
 - Post meeting minutes and current officers
 - Newsletters
 - What documents have you recently needed but couldn't find?
 - Nick and Hannah can help you get started.

Set Yourself Up for Success

- Take Advantage of Your Resources
 - National Website Resources:
 - Monthly Membership Reports: Available 24/7 and updated monthly by National. Trouble navigating or interpreting them? Call the Northwest Office for assistance.
 - Tools for Leaders
 - General governance
 - Finance, Fundraising, and Insurance Resources
 - Membership
 - Presentations
 - Brochures
 - Graphic Resources
 - Awards and Recognition
 - Public Relations
 - Policy Resources

Set Yourself Up for Success

- Stay organized:
 - Set some goals and include a timeline. Break it down into quarterly segments if that's easier.
 - Refer to the SAF Action Calendar and Membership Retention Calendar for key SAF dates.
 - Succession Planning: Election deadlines come quick!
 - Create a list of chapter members who have shown an interest in leadership or that you think have potential.
 - Ask them how they might be able to help and what makes sense for them in their current SAF life stage.
 - Document conversations on the spreadsheet for future reference.



Conclusion

- Last but not least, thank you all for your commitment to SAF and for being here to improve your leadership skills.

Questions?



Lori and Amanda, your friendly Northwest Office staff!

SAF Northwest Office

4033 SW Canyon Road, Portland, OR 97221

503-224-8046 | rasor@safnwo.org | amanda@forestry.org

