

# **The SAF Northwest Office**

## ***Letting it Work For You***

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

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# Purpose of Presentation

- Provide 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 10 easy steps to help prepare you for your leadership role.
- 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 has 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.”
- Time and energy that could go into creative mission-based 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 17-member 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 at the registration desk).
- 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.
- Provide Templates: Need a budget example, sample fundraising letter, or a new member welcome letter? We have them on file.
- Oversee the regional website at [www.forestry.org](http://www.forestry.org) with our regional website coordinator and state webmasters.
- Send Membership e-newsletter 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](http://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. This is an important concept because the state receives revenue from few members than the Northwest Office charges for 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 with Lori.
- Work focuses in Member Services area with key role to provide a local perspective.
- Provide some board-level support.
- 12 hours per week.

# The National Partnership

- Findings:
  - Immensely helpful to understand national-level programs and policies and vice versa
  - Bi-weekly+ interaction with staff valuable.
  - More connected: direct lines of communication
  - Access to staff expertise is key.
  - Our regional infrastructure provides for consistency in delivery of services.
  - Positive experience.

# The National Partnership

- Example Project: Testimonial from NW Members



“When I joined a student chapter of SAF I was able to see what professionals in the field really did, and how SAF members were involved in local and national policy. As a professional member I enjoy meeting other foresters at local and national meetings, and staying current with new research and innovative practices.”

Samantha Chang, Forester, Washington

**Make a difference. Get involved with your local SAF.**

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# The National Partnership



"The Society of American Foresters has given me an opportunity to build professional relationships from the time I was a student to when I became a working professional. Being actively involved in organizing local meetings and state and national conventions has offered me unprecedented networking opportunities and to develop my leadership skills."

Julie Woodward, Forest Education Program Manager, Oregon

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# The National Partnership

- Current Project:
  - Developing an SAF Chapter Success Kit and BMPs.

## How you can help:

**Send Lori ideas on information that would be helpful to you.**



# Set Yourself Up for SAF Success

## 10 Things You Can Do!

1. Read the Leadership email that comes from Corey Ruple by the 10<sup>th</sup> of each month. It includes:
  - Link to the most updated state society membership roster
  - SAF deadlines you should be aware of
  - New SAF programs and campaigns
  - Quick links to a variety of information

**Share this info with your chapter members.**



# Set Yourself Up for SAF Success

## 10 Things You Can Do!

2. Download your membership roster and know your chapter demographics.

- How many young professionals are in your chapter?
- What's the breakdown by employer?
- Identify members who can help in mission-driven projects.
- Who haven't you heard from in a while?
- Are there members deserving of an award?

Use this information to mold projects, chapter programs, and goals.



# Setting Yourself Up for SAF Success

## 10 Things You Can Do!

3. Develop your SAF elevator speech so you can express to others why SAF is important:

- How has SAF influenced your career?
- Why did you become a member?

**Further develop this concept so you can easily talk to a potential new member about why they should be a part of SAF.**

# Set Yourself Up for SAF Success

## 10 Things You Can Do!

4. Know who the key players are within SAF and your SAF area.

These people will be different depending on your SAF role, but be aware of a few basics:

- Who is the SAF president? Read “From the Leadership” each issue in the Source.
- Get to know your state chair?
- Our Policy Committees are very active, are you aware of their undertakings?
- Treasurers have a lot of historical information to share.
- Communication chairs and webmasters can help you.



# Set Yourself Up for SAF Success

## 10 Things You Can Do!

5. If you are a chapter chair, did you know you have a “Chapter Page” on our local website at

[www.forestry.org](http://www.forestry.org)?

- Update your site regularly (quarterly) and add key organizational documents, such as bylaws, to the site.
- Standing committee chairs should also update their pages quarterly.

**To get started, contact your state webmaster (Hannah, Nick, and Ken).**



# Set Yourself Up for SAF Success

## 10 Things You Can Do!

6. Know where to find your resources: Peruse the national website at [www.safnet.org](http://www.safnet.org). Click Local Units, then Chapter Resources, and you will find the Tools for Leaders section with resources on these topics:

- General governance
- Finance, Fundraising, and Insurance Resources
- Membership
- Presentations
- Brochures
- Graphic Resources
- Awards and Recognition
- Public Relations
- Policy Resources



# Set Yourself Up for SAF Success

## 10 Things You Can Do!

7. Attend your state executive committee meeting.
  - You will feel more connected with the organization from bottom to top.
  - You will gain a better understanding of the organizational workings of SAF.
  - You will expand your network by meeting new people and chapter chairs from around the state.

**Reminder: Chapter Chairs are voting members.**





# Set Yourself Up for SAF Success

## 10 Things You Can Do!

8. Have a good working knowledge of SAF budgets and how they interact.

- Chapter
- State
- Northwest Office
- National

**Know how we earn our revenues and how we spend it at all levels.**



# Set Yourself Up for SAF Success

## 10 Things You Can Do!

9. Tell your story and communicate often and broadly
- Let our members and the public know all the neat stuff you are doing:
    - Chapter and newsletters
    - Constant Contact
    - Western Forester and Forestry Source
    - Website
    - Facebook
    - Other?

**Nick and Candra's presentations provide excellent starting points.**



# Set Yourself Up for SAF Success

## 10 Things You Can Do!

### 10. Stay Organized!

- Set some goals and develop a timeline. Break it down into quarterly segments if that's easier.
- Refer to the SAF Action Calendar for key deadlines.
- Know who your new members are and welcome them into the chapter.

**When you get stuck, call someone. Many resources are available.**



# 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**

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