



River Management Society

Statement of Strategic Direction 2001-2005 FINAL DRAFT June 2001

TABLE OF CONTENTS

- Introduction
- Background
- Section I.
 - Mission
 - Vision
 - Vision Tasks
- Section II.
 - Strategy 2001-2005
- Section III.
 - Timeline Worksheets
- Appendix
 - Next Steps and Assignments
 - Plan B Analysis for Hiring an Executive Director in 2001

INTRODUCTION

The following document is a final working draft of a five-year strategic plan for the River Management Society (RMS). This Statement of Strategic Direction is the result of a meeting of the RMS Board of Directors including the Chapter presidents and the Program Director, held on October 6-7, 2000.

The first section of this document is a statement of mission or purpose, and vision—a portrayal of what the organization must accomplish in order to be most effective in addressing its mission.

The second section of this document is a more detailed look at strategy. The goals proposed in this section specify results to be achieved as RMS works toward its vision. The goals are organized under four Vision Tasks, along with specific objectives defining activities to be undertaken to support the goals. The work of expanding the objectives included in this document, establishing annual targets, and action plans should occur annually, so that the plan remains current and fresh.

The third section sets forth a timeline for accomplishing the plan.

It is our hope that the specific, deliberate and achievable goals outlined here provide both focus and structure to our work going forward. We count on, look forward to, and anticipate your active involvement in this important work. Please provide your thoughts and/or written comments to any Chapter President, Board member, or simply mail to the RMS Main Office, P.O. Box 9048, Missoula, Montana 59807-9048, by fax (406-542-6208), or by e-mail to: (rms@river-management.org).

— The Planning Group

BACKGROUND

A historical perspective is provided here to provide the reader the rationale behind the Plan. The following observations are from an independent consultant/facilitator (Nancy Fogg) based on a return (mostly from Board members) of some 24 questionnaires out of 40 mailed, and endorsed by the planning group. The summary analysis of these questionnaires, dated October 2, 2000 is available upon request from the RMS.

- Broaden the RMS membership base.
RMS should progressively expand its outreach to those outside of traditional circles (i.e., agency staff and managers) in order to diversify the membership and thereby connect and contribute to related professionals. Increased marketing and information efforts would help inform a growing potential membership as to the cutting edge, advancing, what works-in-the-trenches, products and other services RMS offers.
- Improve networking opportunities and benefits.
The RMS member camaraderie and networking benefits needs expanding and improvement to remove any misperceptions of cliquishness, insularity or exclusion. The wide variety of member views and expertise is a strength of this organization and member participation should be fully tapped.
- Expand connections to strategic partners.
Other organizations share similar interests and objectives and provide means to leveraging resources, e.g., co-sponsorship of conferences and training, website links, collaborative grant writing, reciprocal membership, recruitment, relationships, outreach and benefits.
- Retain existing members.
RMS needs to identify and focus on providing programs and services most valuable to the current membership which comply with the RMS vision and mission. This goal should be primary in matters of planning, programs and direction using scarce resources to become more viable subject to the development and support of regional chapters.
- Attract new members.
Efforts to attract new entrants to the RMS and leadership ranks should be designed to contribute to their professional development and careers. RMS should creatively seek opportunities to market the expertise of its more senior members (i.e., retirees) and benefit from their seasoned experience and counsel.
- Further define RMS' policy and advocacy role.
The organization needs to address its policy and advocacy agenda by clarifying how RMS affects river management policies and the mechanisms to implement changes. The RMS needs a strategy which allows focus on the most important river management issues and be a primary player and leader at the table with others in discussing and resolving those issues.
- Chapter structure and value.
This is a need to remove any ambivalence and investigate best methods and/or alternatives to better serve the organizational and membership needs. Each chapter should identify clear expectations and objectives in the following areas: professional development, policy, and education/information.

- Diversify funding sources and constituencies.
RMS should be less dependent on agency resources (staff, time and funding). Over the long term, the financial condition of the organization would benefit from diversification and alternative funding and staffing resources--both in type and constituency. By diversifying, RMS can draw additional volunteers, leadership, and a greater variety of support for its vision, mission and mutual objectives.
- Administrative, Program and Service Support.
RMS is near to being over-extended given its mission and objectives. The organization needs to evaluate what is the best investment of resources to increase its capacity to administer and deliver quality programs and member services. RMS needs to investigate other means of obtaining dedicated support and the responsibilities which can or should be shifted to volunteers.

MISSION

A mission statement is a concise statement of strategy. It should define the organization's purpose.

The mission of the River Management Society is to assist river professionals in their efforts to provide for the health of America's rivers and their ecosystems, for today and for tomorrow.

VISION

A statement of vision describes the changes that an organization seeks to effect. Board members and staff commit to working toward that vision of change—their preferred future. It is a statement of aspiration.

As a society of river professionals, we are committed to achieving excellence in the management of North America's rivers: utilizing science, knowledge, experience and public values to influence and develop sound decisions that protect and preserve the quality and importance of river environments.

VISION TASKS

To accomplish these things we must perform with excellence in five areas. These are our Vision Tasks.

Vision Task One: Professional Development.... to support career-long learning, quality in river management and leadership in our field of work.

- We will establish recognized professional standards that uphold the credibility of our profession and support consistency and quality in river management for use in higher education, certification programs and hiring.
- We will expand our professional development services to include (1) a certification program in specialized areas of river management, (2) a mentoring program matching individuals who are new to the field with seasoned members, and (3) an internship placement service to introduce students and others to our profession.
- We will continue to provide an array of member services and technology that support active networking and interactive learning among members, working to keep each service current, accurate, accessible and easy to use.

Vision Task Two: Information and Education.... to create knowledge and share it across the system

- We will establish a professional publications program so that the body of knowledge created by RMS members and through RMS activities is documented, replicable and accessible to many. Publications will include a professional journal, "best practice" field management guides, and a collection of "River Ethics" promotional materials in formats suited to field use.
- We will begin the work of building a comprehensive, searchable database, cataloging a broad range of river management actions, issues, decisions and practices data, cross referenced to member and non-member experts and organizations ultimately making RMS the definitive resource for information relevant to rivers and river management.
- We will make an effort to stimulate research and applied science projects in the areas of healthy river ecology and river system management through collaboration with researchers and funders.
- We will work to meet the needs of field professionals, state river program managers and prospective international clients who are developing river management systems for the first time by establishing a fee-based consulting program designed to address each customer's specific need at a reasonable cost—from local assessments and improvement plans to consultation on system development.

Vision Task Three: Advocate... for the use of science and research in policy development and decision-making at all levels of river management, public and private.

- We will make a concerted effort to influence policy makers by providing sound science and information toward making decisions that ultimately support the present and future health of rivers and their ecosystems, activating public issues committees at the national and regional levels.
- We will assist other entities advocating for policy that is complementary to the RMS mission by providing them with the research, science and data that will make their arguments both credible and compelling.

Vision Task Four: Build Capacity... in our organization to achieve these tasks

- We must diversify our funding. As the range of member services increases, we must ensure a fair return on RMS events and memberships, and carefully explore opportunities for grants and other contributed income.
- We will work toward developing the funding to support the addition of an Executive Director to our staff.
- We will continue to expand and diversify RMS membership (RMS's customer is defined as individuals who can decide or influence how rivers are managed and /or treated. The primary customer will be public employees and private sector leaders who bear similar responsibilities. Others include educators and academics, researchers, consultants, and advocates.) and personally encourage all of our members—especially those who are new to the group—to volunteer in some capacity for RMS at national and regional levels.
- Finally, we will expand our programs and services by leveraging our existing capabilities and resources through working, shared resource partnerships with government agencies and other organizations whose purpose is complementary to ours.

Section II. Strategy 2001-2005

Vision Task One: Professional Development... to support career-long learning, quality in river management and leadership in our field.

| Strategic Goals: Ends | Objectives: RMS Activities | Measures/Indicators | Annual Target 2001 |
|--|---|--|---|
| <p>Goal I. Provide training and coaching to support the professional development of river professionals.</p> <p style="margin-left: 20px;">a) nationally b) regionally</p> | <ol style="list-style-type: none"> 1. Continue to present the biennial symposium and alternate year inter-agency workshop. 2. Determine what training should be offered regionally, how often and by whom. 3. Develop and implement a formal mentoring program connecting experienced members with members who are new to the field. 4. Maintain a job board for river management positions. 5. Design an internship program for college students and others who express an interest in pursuing a career in river management. | <ul style="list-style-type: none"> • levels of participation in RMS training: how many and the participants' affiliation/job • # of mentoring relationships • # jobs listed • # of intern openings • # of intern placements • intern and or mentoring applications | <ol style="list-style-type: none"> 1. Present the Interagency Workshop in 2001. 2. Plan for the biennial symposium to be held in Boise in 2002. 3. Implement Internship program with the University of Montana. 4. Other targets to be identified prior to January 1, 2001. |
| <p>Goal II. Increase the scope and level of active networking and interactive learning among members.</p> | <ol style="list-style-type: none"> 1. Publish an annually updated directory of members. 2. Maintain effective listserv and bulletin board programs. 3. Provide scholarships to ensure continuing participation of experienced retired river professionals in RMS events. | <ul style="list-style-type: none"> • directory distribution • listserv activity • member satisfaction | <ol style="list-style-type: none"> 1. Provide scholarships per 2001 Budget. 2. Publish 2001 Member Directory 3. Other targets to be identified prior to January 1, 2001. |
| <p>Goal III. Establish recognized professional standards that support consistency and quality in river management.</p> | <ol style="list-style-type: none"> 1. Define core competencies and related selection criteria for the position of river manager. 2. Collaborate with appropriate partners in higher education to define requirements and curriculum for bachelor's and associates degrees in river management. 3. Identify specialized areas of river management that would benefit from a certification process and develop the requirements and curricula for each. <ol style="list-style-type: none"> a) FERC licensing b) others to be identified | <ul style="list-style-type: none"> • use of position design template • # of degree programs in river management • certification programs in use • # certified | <ol style="list-style-type: none"> 1. To be identified prior to January 1, 2001 |

Vision Task Two: Information and Education...to create knowledge and share it across the system

| Strategic Goals: Ends | Objectives: RMS Activities | Measures/Indicators | Annual Target 2001 |
|--|---|--|--|
| <p>Goal IV. Establish a professional publications program to document the knowledge created by RMS members and activities.</p> | <ol style="list-style-type: none"> 1. Solicit and publish white papers on matters of interest to river managers and river management policy makers. 2. Publish a Symposium Journal documenting presentations and dialog for each RMS symposium. 3. Publish user-friendly field management guides for distribution in the field detailing "best practices" for river users. (e.g. river access site management, interpretation provision, etc.) 4. Develop and publish a collection of "River Ethics" materials suitable for use in the field. | <ul style="list-style-type: none"> • publications • distribution • sponsor revenues on Ethics pieces? | <ol style="list-style-type: none"> 1. Develop and produce the proposed "River Ethics" materials 2. Other items to be determined prior to January 1, 2001 |

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| <p>Goal V. Establish a comprehensive, searchable database cataloging a broad range of data and other resources relevant to rivers and river management.</p> | <ol style="list-style-type: none"> 1. Phase in the collection of information for the database, including: <ol style="list-style-type: none"> a) current river management actions, emerging issues, policies and practices b) individual river profiles (see *) c) regional profiles (see b) d) annotated bibliography e) issue/response repository f) funding sources g) best practices h) cross-references for internal (member) and external (non-member) "expert/experience" resources 2. Explore possible partnerships to support on-going maintenance of data collection, entry and funding. 3. Investigate the possibility and appropriate pricing for access to the database by non-members. | <ul style="list-style-type: none"> • size and content of the database • # or hits • revenues derived from the database | <ol style="list-style-type: none"> 1. Update River Digest. 2. Other items to be determined prior to January 1, 2001 |
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| <p>Goal VI. Facilitate research and applied science projects in the areas of healthy river ecology and river system management through collaboration with researchers and funders .</p> | <ol style="list-style-type: none"> 1. Identify probable funding sources. 2. Draft guidelines for grants. | <ul style="list-style-type: none"> • # of grants made • # of funding institutions • \$ awarded | <ol style="list-style-type: none"> 1. Items to be determined prior to January 1, 2001. |
|---|--|---|---|

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| <p>Goal VII. Establish a revenue producing consulting program designed to meet the needs of prospective clients here and abroad who are developing river management systems.</p> | <ol style="list-style-type: none"> 1. Develop a product line (specific service packages) for consulting services and a pricing structure. <ol style="list-style-type: none"> a) Site analysis/recommendations b) Systems development 2. Market the program to appropriate audiences. | <ul style="list-style-type: none"> • program in place • marketing plan (pricing, promotion, etc.) • # or contracts • # or providers • revenues generated (gross, net) | <ol style="list-style-type: none"> 1. Items to be determined prior to January 1, 2001 |
|--|---|--|--|

Vision Task Three: Advocate... for the use of science and research in policy development and decision-making at all levels of river management, public and private.

| Strategic Goals: Ends | Objectives: RMS Activities | Measures/Indicators | Annual Target 2001 |
|---|---|---|---|
| <p>Goal VIII. Provide sound science and information that will influence policy makers to make decisions that ultimately support the present and future health of rivers and their ecosystems.</p> | <ol style="list-style-type: none"> 1. Activate a National Public Policy Committee; responsibilities include: <ol style="list-style-type: none"> a) research on emerging national policy b) position development in accord with existing Charter requirements c) member communication (alerts, et al) d) member education (Symposia, etc.) e) representation of RMS at appropriate tables. 2. Establish Chapter-based Public Policy Committees to address emerging issues on regional and local levels; responsibilities include: <ol style="list-style-type: none"> a) regular communication among policy players in their particular chapter. b) position development in accord with existing Charter requirements c) member communication d) member education e) representation of RMS at appropriate tables. | <ul style="list-style-type: none"> • policy supportive of RMS mission • member alerts • tables at which RMS is represented | <ol style="list-style-type: none"> 1. Items to be developed prior to January 1, 2001 |

* to include the following: managing agency, land ownership, river use and carrying capacity, fee collection and allocation, permitting, private and commercial safety , requirements, user conflict issues and resolutions, flow agreements/programs, water quality, river habitat, staffing patterns, law enforcement and patrol means and capabilities, working partnerships and community roles, etc.

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| Goal IX. Provide research, science and data to other organizations or public entities who advocate for policy that is complementary to the RMS mission. | <ol style="list-style-type: none"> 1. Identify organizations whose advocacy efforts support the mission of RMS. (Example: Leave No Trace) 2. Market RMS' capabilities in providing research, science and data to support their positions. | <ul style="list-style-type: none"> • organizations identified • requests for information | 1. Items to be determined prior to January 1, 2001 |
|---|---|--|--|

Vision Task Four: Build Capacity in our organization to achieve these tasks

| Strategic Goals: Ends | Objectives: RMS Activities | Measures/Indicators | Annual Target 2001 |
|---|--|---|---|
| Goal X. Diversify RMS funding. | <ol style="list-style-type: none"> 1. Review fee structure for RMS membership and services as the range of member services increases. 2. Analyze and (where possible) adjust symposia and workshop costs to maximize revenues. 3. Initiate a major gifts campaign <ol style="list-style-type: none"> a) establish a Major Gifts Committee to work alone or with an executive director b) identify appropriate giving opportunities and their price tag and benefit to the donor c) develop a written menu of these opportunities d) research potential funders for each opportunity and personally market the menu. (ASK) e) manage donors appropriately. 4. Explore funding pattern/mix in other professional societies | <ul style="list-style-type: none"> • net on revenue producing activities • major gifts program up and running • gifts received • # of donors • size of gifts | 1. Items to be determined prior to January 1, 2001 |
| Goal XI. Expand RMS staffing to include an Executive Director position. | <ol style="list-style-type: none"> 1. Clarify the purpose and specific responsibilities for this position relative to the coming fiscal year. 2. Research pay norms for similar positions in small organizations like RMS. 3. Conduct a comparative budget analysis to include projected RMS revenues and their allocation for FY 2001 with and without the added position.(Plan B, revisited) 4. Evaluate the relative cost/benefit of hiring in 2001. 5. In the event there is no hire in 2001, begin reserving a minimum of \$_____ annually for an Executive Directive Fund. | <ul style="list-style-type: none"> • paid staff | <ol style="list-style-type: none"> 1. Reach a decision regarding a 2001 hire by January 1, 2001. 2. Pending this decision, identify specific priorities for this individual to address in 2001. 3. Activate the Executive Director Fund reserve program. |
| Goal XII. Expand membership and develop its volunteer resources. | <ol style="list-style-type: none"> 1. Conduct personal outreach to participants in Rivers 2000 and new symposium members. 2. Assess chapter membership and recruit new members in light of who the necessary players are in each region. 3. Review chapter activities to assess their value to membership. 4. Promote member involvement in the Interagency Workshop and Symposium 2002 5. Activate the Membership Committee. 6. Assess and amend current committee structure in light of strategic plan and its priorities and use plan to invite members to become involved in its execution. | <ul style="list-style-type: none"> • members/non-members contacted • membership profile • # of active members • active committees | <ol style="list-style-type: none"> 1. Personal outreach (Barry and Chapter Presidents) 2. Activate the Membership Committee 3. Other items to be developed prior to January 1, 2001. |

Goal XIII. Develop partnerships to share resources and leverage RMS' capabilities.

1. Explore and make use of opportunities for partnerships and partners in the following areas:
 - a) a university partner or other institution of higher education to work on the development and recognition of professional credentials, curriculum and certification.
 - b) advocacy groups for "silent partnerships"
 - c) regional partners (agency and non-agency) who can assist RMS in influencing policy development
 - d) collaboration in the creation and on-going maintenance of the proposed database
 - e) funding for applied research and science
 - f) opportunities to co-market training and other member services.
2. Develop a promotional brochure for use with external audiences.
3. Explore and evaluate the possibility of becoming a program within a larger professional association.

- # of partners
- brochure

1. Develop and produce brochure pending decision on 2001 budget and allocation of BLM contract revenues.
2. Conduct a year end questionnaire for expired members in the database.
3. Other items to be developed prior to January 1, 2001.

Section III. Timeline Worksheets

| Goal | 2001 Target | 2002 Target | 2003 Target | 2004 Target | 2005 Target |
|--|-------------|-------------|-------------|-------------|-------------|
| Goal I. Provide training and coaching to support professional development of river professionals, nationally / regionally | | | | | |
| Goal II. Increase the scope and level of active networking and interactive learning among members. | | | | | |
| Goal III. Establish recognized professional standards that support consistency and quality in river management. | | | | | |
| Goal IV. Establish a professional publications program to document the knowledge created by RMS members and activities. | | | | | |
| Goal V. Establish a comprehensive, searchable database cataloging a broad range of data and other resources relevant to rivers and river management. | | | | | |

Section III. Timeline Worksheets (continued)

| Goal | 2001 Target | 2002 Target | 2003 Target | 2004 Target | 2005 Target |
|--|--------------------|--------------------|--------------------|--------------------|--------------------|
| Goal VI. Facilitate research and applied science projects in the areas of healthy river ecology and river system management through collaboration with researchers and funders . | | | | | |
| Goal VII. Establish a revenue producing consulting program designed to meet the needs of prospective clients here and abroad who are developing river management systems. | | | | | |
| Goal VIII. Provide sound science and information that will influence policy makers to make decisions that ultimately support the present and future health of rivers and their ecosystems. | | | | | |
| Goal IX. Provide research, science and data to other organizations or public entities who advocate for policy that is complementary to the RMS mission. | | | | | |
| Goal X. Diversify RMS funding. | | | | | |
| Goal XI. Expand RMS staffing to include an Executive Director position. | | | | | |
| Goal XII. Expand membership and develop its volunteer resources. | | | | | |
| Goal XIII. Develop partnerships to share resources and leverage RMS' capabilities. | | | | | |

Appendix

The Strategic Planning Group (SPG) agreed to the following plan of action.

Next Steps and Assignments

| What | Who | When | Done |
|---|---------------------------------------|--|------|
| • Meeting Notes; draft of plan | Nancy Fogg | by October 20 | ✓ |
| • SPG feedback on plan to Nancy | Flathead Lake SPG, including Caroline | by November 9 | ✓ |
| • Final draft of plan | Nancy | by December 1 | ✓ |
| • Position description and 2001 priorities for Executive Director | Personnel Committee | by December 15 | |
| • Conference call to finalize 2001 budget (hire or not hire) | Barry with Board | schedule in December | |
| • Develop a plan to market the plan to the membership | Barry et al | schedule: complete process by January 30, 2001 | |
| • Adopt plan and implement 2001 targets | Board of Directors | schedule | |
| • Annual planning 2002: identify new targets | Board and staff | Annual meeting | |

Plan B Preliminary Analysis for Hiring an Executive Director in 2001

Cost: \$14,000 for a half time person

Programs kept:

- Ethics program (*Vision Task Two, G. IV- 4*)
- River Digest update (*Vision Task Two, G. V-Annual Target 1.*)
- Implementation of additional priorities to be identified by the Personnel Committee and presented to the Board.

Programs lost:

- intern program (*Vision Task One, G.I-5. Annual Target 3.*)
- brochure (pro bono?) (*Vision Task Four, G. XIII-2*)
- safety net of cash reserves