



# E-PARCC

## COLLABORATIVE GOVERNANCE INITIATIVE

Syracuse University

Maxwell School of Citizenship and Public Affairs

Program for the Advancement of Research on Conflict and Collaboration

## Leading IslandWood Case B

### Moving IslandWood Forward

Since Executive Director Ben Klasky led IslandWood through a strategic planning process in 2005, the organization had increased its financial stability and programmatic reach. Those associated with organization were energized, celebrating many successes ranging from a successful founder transition to its School Overnight Program reaching full capacity serving 70 schools. By 2008, IslandWood had to figure out how to keep the momentum going and expand its education programs for students. With the campus now operating at increased capacity, IslandWood was becoming financially secure, though it still required demanding efforts by the staff to reach the annual targets for both earned and contributed revenue. Ben and his leadership team decided it was time for IslandWood to expand its impact through community partnerships with the aim of providing exceptional hands-on learning experiences to even more students. But establishing partnerships would not be easy. IslandWood staff and board would have to identify potential partners, evaluate their interest in partnering, and assess possible matches for mission and strategy alignment. There were also practical considerations to weigh. How would IslandWood establish the terms of working relationships with partners to effectively allocate resources and staff for co-delivering programs. Most importantly, IslandWood and its would-be partners would need to consider the interests of all their various stakeholders, with special attention to the most important group – the students served in the education programs.

This case is the Snow Foundation Award Winner for the best case or simulation in Collaborative Nonprofit Management in our 2011-12 “Collaborative Public Management, Collaborative Governance, and Collaborative Problem Solving” teaching case and simulation competition. It was double-blind peer reviewed by a committee of academics and practitioners. It was written by David Cook and Lauren Guzauskas of The Daniel J. Evans School of Public Affairs at the University of Washington. This case is intended for classroom discussion and is not intended to suggest either effective or ineffective handling of the situation depicted. It is brought to you by E-PARCC, part of the Maxwell School of Syracuse University’s Collaborative Governance Initiative, a subset of the Program for the Advancement of Research on Conflict and Collaboration (PARCC). This material may be copied as many times as needed as long as the authors are given full credit for their work

The first component of IslandWood's 2005 strategic plan had called for maximizing revenue generating programs, such as summer camps and corporate conferences. To make that possible, the organization initiated its second component of the plan – launching a capital campaign to build a fourth lodge that would accommodate both students and adult guests attending IslandWood for conferences. The third component of the plan included creating an operating endowment to ease the burden of annual fundraising efforts for unrestricted funds. The organization was already benefiting from its maintenance and scholarship endowments, and an endowment for general operating would address one of IslandWood's primary financial needs. By 2008, IslandWood had made significant progress on the first two initiatives. Thanks to a successful capital campaign, the organization began construction on the new Ichthyology Inn, designed with both adult guests and students in mind.

In the first three years of Klasky's tenure the organization experienced an exciting period of growth and transition. By 2008, IslandWood had seven years of experience providing children and adults with environmental education programs. The School Overnight Program (SOP), which hosted 4th, 5th, and 6th grade students for four-day residential trips to campus, was nearing full capacity. The program served 3,000 students a year, while many other initiatives, such as the graduate program, conferences, and summer programs, had grown steadily. The organization had recently completed a three-year external evaluation of its school programs, assessing its overall effectiveness. In addition, IslandWood was beginning to receive national recognition for their facility and programming from such institutions as PBS, the Sierra Club, and National Geographic.

Having participated in the three successful years of effective strategy, founder Debbi Brainerd transitioned away from the day-to-day operations of the organization, and out of the board chair position. Debbi recalled, "We knew that the leadership transition would take several years. There were quite a lot of relationships that needed to be handed over to Ben." Many of those relationships were with donors, representing relationships that Ben had to maintain and grow to ensure the continued sustainability and growth of the organization. In addition, as board member Fraser Black remembered, Ben had his own ideas about the direction that IslandWood should take, but "Ben was very cautious about putting his stamp on IslandWood because Debbi was still there. Ben was appropriately sensitive, and polled board members and other stakeholders to find out where IslandWood should go next." Ben was ready to take the necessary risks to expand that quality programming, but he was also aware of Debbi's founding perspective, saying "We [IslandWood] are like her adolescent kid. She created this place. She wants us to grow-up and go to college. I worked with her to define where she could be the most valuable and where we need to take risks, and sometimes fail like an adolescent might. We needed to have those real conversations and permission to fail." Debbi was investing more and more of her time and energy in other projects, and IslandWood was ready for the next step.

## **Beyond the Campus**

In its startup years, IslandWood created strategic plans that spanned three to five years. Now the organization was setting itself up to reach even further. The board and staff invested considerable time and energy into creating a comprehensive strategic plan that included goals for the next ten years (2008-2018). Ben knew that the campus was reaching capacity, and IslandWood could not earn additional revenue by bringing additional students or adults onto the campus. He remembers

the leadership at the time joking that, “if we keep building more buildings, there will be no more nature left. We’ll be a little city on Bainbridge Island.” As a result, Ben, senior leaders, and the board agreed that the next thing to do was to go off campus, and created the goal of “expanding program participation and growing our reach to students and teachers beyond our campus, by developing strategic partnerships, expanding our facilities, and maximizing the use of our current facilities.”

This organizational shift was difficult for some staff members who came to IslandWood for its emphasis on place-based education. Ben was empathetic to their struggles, saying “Staff went to the schools maybe seven times during the year to get to know these students. Then the students come to this place (IslandWood), which is very special. The staff designed the curriculum around the watershed on campus.” Ben understood that it was difficult for them to be asked to teach in Seattle. “It’s not that they don’t like that vision, but it’s not what they signed up for.” Some staff members wanted to focus on improving their curriculum and increasing the impact that they had on the students that they currently served, rather than focusing on reaching more students. It was a debate between increasing the breadth of services versus increasing the depth. Ben thought that this debate needed to be informed by additional information about who else was providing similar services in the Puget Sound area.

### **Redirecting Resources at IslandWood**

Looking back, Ben recalled that Debbi had done her research when founding the organization. During her six month feasibility study, Debbi asked leaders of other centers the primary question, “If financial constraints were not an issue, what type of program would you build and how would you build it?” That strategy helped Debbi build a program on industry best-practices and design IslandWood’s quality core programming, “I found some other facilities that were really models for us and tried to take the best from each center that I visited,” Debbi remembered. Eight years later, this body of research would also help Ben and the leadership team to build knowledge of the other organizations in the Puget Sound.

In order to have the capacity to explore and vet possible partnerships, Ben created a new position, Director of Outreach and Partnerships, for Pat O’Rourke, who had been IslandWood’s Director of Education for the previous six years. In December of 2008, O’Rourke assumed the new role in a part-time capacity that enabled her to both ease into her upcoming retirement and to utilize her relationships within Seattle’s education community. O’Rourke saw herself as “as a catalyst for outreach and partnerships. I lay the groundwork, explore options, connect the core mission and staff with potential outreach work. The position is the bridge between on-campus and off campus work.”

O’Rourke had the responsibility to decide which partnerships to pursue and which opportunities were not a good fit for the organization. But she needed to collaborate with Ben, senior leaders, and the board, as IslandWood’s definition of ideal opportunities was constantly evolving. She was faced with questions about whether or not IslandWood would expand beyond 4th, 5th, and 6th graders, or perhaps beyond the general population within Puget Sound area schools.

## Exploring the Environment

Pat referred back to Debbi's preliminary research during the founding of IslandWood, and recognized that the center was not the only residential environmental education program of its kind. In fact it was one of the youngest organizations doing this type of work. Coincidentally, IslandWood had just hired a new Director of Education from the Teton Science School in Wyoming, which was one of the organizations Debbi initially visited due to its strong national reputation. Located in Grand Teton National Park, Teton Science School was founded in 1967 and boasts 2,900 students served from 22 states in a student overnight program and a graduate school program with six university partners. Its programming portfolio served as a partial model for IslandWood's.

Pat knew that Debbi had also previously served on the board of another similar organization, the North Cascade Institute (NCI), a longtime environmental education destination for residents in Western Washington. Founded in 1986, and located in a national park near Sedro-Wolley, Washington, NCI had a strong national reputation for its successful community programs. Similar to IslandWood, it offered week-long overnight programs that served 2,050 middle and high school students per year as well as a residential graduate program in partnership with Western Washington University. NCI had also just opened a new environmentally-friendly learning center with overnight lodging for 92 visitors, thanks to a partnership with the City of Seattle and the North Cascades National Park.

Closer to Bainbridge Island, Pat was familiar with Olympic Park Institute (OPI) in Port Angeles, Washington, which had run programs for 4th through 12th graders since 1987 and served 6,000 students from around the country each year. While OPI did not have a graduate program, it did provide training for 120 adult educators each year, and ran conferences and retreats. OPI is located west of the Puget Sound, and previous to IslandWood, had been the primary destination for Bainbridge Island school's outdoor education trips. The Wilderness Awareness School (WAS) in Duvall, Washington was another option for students specifically looking for a back-to-basics program founded in Native American philosophies of environmental awareness and wildlife tracking. WAS offered outdoor survival classes, adult and youth courses, and a graduate program. All of these programs: NCI, OPI, Teton and WAS utilized public land to run their programming, which gave them fewer assets to maintain than IslandWood with its private campus.

Earlier that year, when O'Rourke was still the Director of Education, her team had recognized the potential benefits of collaborating with these institutions, and they established a successful graduate student exchange program between IslandWood, WAS, and NCI. The graduate student exchange was just the beginning of the potential partnerships available to O'Rourke. She reflected on the position and her primary responsibility in the role as that of, "a catalyst for outreach and partnerships. It's laying groundwork. It's exploring options. It's connecting the core mission and staff with potential outreach work. It's the bridge between on-campus and off-campus." She had the connections and resources to build on IslandWood's strengths, but sought input from her colleagues on which partnerships would best serve IslandWood in the future.

## Identifying Next Steps

Beyond OPI, NCI, and WAS, O'Rourke had additional information regarding other environmental programs that operated in Seattle, which she shared with Ben and the IslandWood director team. This research would help IslandWood's leadership determine the organization's direction. Pat provided a summary of organizations that provided similar or complimentary services to IslandWood, but were not quite as large or established as OPI, NCI, and WAS (Exhibit 1).

Outside of the groups offering similar environmental education programs, other organizations provided after-school programs for youth, like the Boys & Girls Club of King County, but did not have any science or environmental education component. Other programs at Seattle Parks and Recreation reached students through Community Learning Centers after school each day, but lacked curriculum and instruction. "There was a lot of acceptance by the staff to expand to after-school partners like the Boys & Girls Club because we work with a lot of the same students," O'Rourke recalled. Despite some excitement, other staff members were not as enthusiastic, and the organization's direction seemed unclear. What was clear was that IslandWood's leadership team needed to determine the strategic objectives that these new partnerships could help fulfill, which would give O'Rourke the guidance she needed to build IslandWood's capacity and services.

Having previously focused the collective attention of board and staff inward during the strategic planning process, it was time for IslandWood to look outward and assess its context in the greater marketplace of environmental education programming in Washington. In its latest strategic plan, IslandWood's stakeholders had called upon the organization to broaden its impact by reaching more students. The staff would need to develop and grow off-campus programming in order to fulfill that vision. Yet Ben knew IslandWood needed to balance expansion with long-term financial stability. He felt the timing was right to take a first step to help the board and staff get used to the idea of off-campus programming. He was unsure, however, about what form the expansion should take, or who should provide the new programs. As he contemplated the partnership options that Pat presented, he knew one thing for sure. "If we succeed, it would mean exciting opportunities to stretch the scope of our programs. But if we fail, it wouldn't just be a missed opportunity. It would set us back, undermining the recent successes of the past few years."