



*The Institute for Senior Professionals  
Okaloosa-Walton Community College  
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Niceville, FL 32578*

**Memorandum:** Review of the Choctawhatchee Basin Alliance Organization

**From:** ISP/Special Review Panel

**For:** CBA/Board of Directors

February 19, 2003

1. Background: In May 2002, the Executive Director of the Choctawhatchee Basin Alliance (CBA) requested the assistance of the Institute for Senior Professionals (ISP) in reviewing both its business and strategic plans. In subsequent discussions with members of the Board of Directors, several expressed concern that the CBA had plateaued, organizationally; consequently it was time to examine the current business model with a view to increasing its effectiveness and impact upon the community. The ISP accepted the request, and assigned a review panel to take a comprehensive look at the CBA.

2. Definitions: As the panel understands, a business model is a description of the operations of a business, including its organization and functions, and the revenues and expenses that the business generates. A business plan is a path for an organization to progress from its present situation to an improved future one. It requires a clear articulation of its mission, a description of the current organizational circumstances, the identification of its intended customers and products, and a frank assessment of its strengths and weaknesses. In the following paragraphs we address some of these issues, comment on them, and venture several recommendations. In an appendix, we include several comments and suggestions that do not rise to the level of a recommendation.

**Organizational Overview:**

3. The Choctawhatchee Basin Alliance: The CBA is an OWCC-sponsored, non-profit organization operated by a full-time executive director and an additional paid staff of three. A ten person volunteer board of directors acts in an advisory capacity, with several serving also as committee chairmen. A membership base of about 100 provides limited additional volunteer support as needed. OWCC furnishes office facilities and basic logistic support, and acts as fiduciary agent. Along with this, the college also reserves the right to review the operations of the CBA. There is close working and advisory liaison with a number of state and Federal environmental agencies and with local environmental engineering firms. The CBA's

effectiveness is leveraged by its operational characteristic of “partnering” with other community organizations.

4. History: The Florida Department of Environmental Protection (FDEP) was instrumental in founding the CBA; this was done as part of a statewide ecosystem management initiative. The intent was to focus environmental management efforts on major watersheds by better coordinating local, state and federal agencies and citizen action. Initial CBA activities were strongly supported by FDEP, Northwest Florida Water Management District (NFWMD), Eglin AFB and others, with agency employees actually holding some board positions. Over time the governmental agencies reduced their commitment to - and involvement in - the various statewide ecosystem management groups; as a consequence, most groups disappeared. A few, however - including the CBA - were well enough established locally to survive and prosper.

5. Purpose: The stated mission of the CBA is to “sustain and provide optimum utilization of the Choctawhatchee Bay... and to provide opportunities for educators, citizens and technical experts to promote the health of the Choctawhatchee Basin”. Not stated, but implicit in this is an interest in the whole ecological system, including fish, waterfowl and other wildlife. A difference between the CBA and many traditional “green” organizations is that the CBA focuses on the supply side of the environmental equation – specifically, on water quality and habitat. That is to say, rather than imposing regulatory mechanisms (e.g. fishing net bans), the CBA strives to encourage or establish those habitat and environmental conditions that could lead to an increase in the size and vigor of fish and other wildlife populations.

6. Leadership: An important feature of the CBA is the vision, continuity and perseverance of a small cadre of board members, which has been responsible for the progress and accomplishments of the organization since inception. The backgrounds of these members have given the CBA a primarily technical-scientific orientation. In 1998 the CBA – partnering with the Water Management District - published *Breaking New Ground*, a comprehensive environmental analysis of the Choctawhatchee basin. In 2000, the board established a three-year strategic plan, based upon the foregoing publication. That plan has become the principal basis for action by the CBA, which has since then worked towards its implementation.

7. Working focus: The work of the CBA is confined generally to the Okaloosa and Walton county portions of the Choctawhatchee watershed basin (exception: the Coastal Dune Lakes of Walton County and certain seashore restoration projects). The waters of this basin are under pressure - primarily from loss of shoreline vegetation and increased stormwater runoff as a result of development. However, they are not yet “in crisis” as defined by state and federal standards. This has allowed the CBA the luxury of pursuing a deliberate and analytical approach to water quality issues. This aspect of the CBA is in significant contrast to other regional organizations, which are characterized either by grassroots confrontation on the one hand, or action programs funded and operated by the state or regional government on the other.

8. Programs: Our examination of the CBA has led us to identify nine distinct standing programs:

1. Outreach and public education;
2. Deep water sampling in the Choctawhatchee Bay;
3. Water sampling in the Coastal Dune Lakes;
4. Dunes, seashore, wetlands, uplands and watershed restoration;
5. Marine habitat restoration;
6. Stormwater research, planning and remediation;

7. Technical consultation and assistance;
8. Estuarine research;
9. Repository of watershed and estuarine research data.

9. Funding: Activities of the CBA are funded by grants and contracts for services from Federal and state agencies, donations, in-kind contributions, and membership dues. The Review Panel estimates that for FY 2001-2002, the structure and activities of the CBA have a value (including costed in-kind donations) of about \$625,000. This includes personnel costs and all overhead and program activities. Of this, \$400,000 is a one-time State of Florida grant for a water quality assessment of the Bay. In the absence of follow-on grants to the water quality assessment, (and assuming that donations continue at current levels) the organization will fall back to an estimated base budget in FY 2002-2003 of approximately \$225,000. Of this, staff payroll and infrastructure will absorb about \$150,000.

10. CBA Accomplishments: The staff and volunteers of the CBA have been very active in carrying out public education and outreach programs. Their efforts have included annual estuary events, quarterly programs, open symposia, and technical-scientific presentations. Some are cooperative community events that simply would not have occurred without CBA organization and hosting. A joint governmental committee chaired by the CBA has coordinated stormwater management planning throughout Okaloosa County. The CBA has also engaged in consultation with local agencies and construction firms, advising them of best management practices for environmentally sound development. The staff and volunteers of the CBA have undertaken extensive water data collection in the bay and coastal dune lakes. These water-sampling projects have contributed to the FDEP's understanding of the Bay. The work is now culminating in the above-noted water quality assessment study; this will have community-wide implications, as noted below. Lastly, the CBA has concretely impacted on the two-country area by executing many large and small shoreline and watershed restoration projects.

11. The Business Model: The current business model for the CBA can be summarily restated as follows: It is a college-sponsored, volunteer-supported, non-profit organization acting as a low profile, trusted steward of the Bay and watershed. Its customer base is the public and private community on and around the Choctawhatchee Basin, as well as those state and federal agencies that have operational or regulatory responsibilities within that watershed. The CBA provides services to its customers. Those services include public education, water quality data collection and analysis, watershed research and expertise, shoreline, watershed and habitat restoration, stormwater research, and planning coordination. The CBA's revenues derive from an opportunistic combination of contributions, donations, membership fees, grants and contracts from many sources. Most projects entail specified services on behalf of state and Federal agencies, funded by those agencies.

12. Strengths: An inventory of CBA strengths includes a supportive affiliation with OWCC; a good working relationship with key regulatory and county agencies; a non-adversarial approach to water quality matters; a thorough understanding of the technical issues; recognition and credibility among environmental specialists; sound technical public education activities; a willingness to partner with other community organizations to achieve its objectives, an ability to marshal volunteers for ecological tasks; and the continuity, perseverance and working relationships of its leadership.

13. Weaknesses: Weaknesses include a small, declining and relatively inactive membership base, lack of potential successors to long-term board members, poor name and mission recognition by the community, an absence of a sense-of-ownership by county and municipal

entities, the lack of a computer-based geographic information system (GIS), relatively few membership and outreach activities oriented on layman interests, inadequate media exposure, a vision focused at present on largely technical matters, a strategic plan restricted to a three year time-horizon, and a very limited number and type of funding sources.

14. Pending challenges: The next few years will see at least two developments with operational implications for the CBA: the introduction of municipal stormwater plans within the two county area; and the completion of the water quality assessment. As noted, the CBA has played a useful role in coordinating countywide stormwater plans, and has initiated and is directly overseeing the water quality assessment. Both projects cannot help but lead to recommendations to undertake remedial actions by local authorities. As a consequence, the CBA may be faced with a transforming possibility: The organization will have established itself as the central repository of estuarine research data as well as the trusted agent at the center of water quality issues. As such, it may be presented with the opportunity and expectation that it operate more pro-actively as an advocate of recommended actions. With this may also come new funding opportunities.

#### **Comments and Recommendations:**

15. A New Business Model? The panel finds that the basic business model as described above is appropriate and useful at this time and within the local context. However, that model - and the way it is implemented - is in our opinion not bold enough for the CBA to be able to implement its goals and objectives. In particular, the panel is concerned about the small size and lack of involvement of the membership base, the weakness of public image and support (including that of local government), the lack of sustainable and predictable funding, the vagueness of the mission statement, a strategic plan that appears to be unevenly implementable, the dearth of useful financial management documents, and the hesitancy of the organization to take a pro-active stance with respect to environmental issues.

16. Membership: The panel questions whether the CBA can continue at its present size, in terms of membership, and still remain effective. It appears that the CBA is already at - and perhaps beyond - the limit of what it can accomplish given its present membership, staff and funding. As noted above, the CBA has a membership base of about one hundred; even this has declined over the past year. This small a membership limits the pool of actual and potential volunteer assistance (including board members and committee workers). A larger membership should be viewed as an asset in several ways: It holds the potential to create a greater sense of community ownership of the mission and programs of the CBA. It allows the organization a wider reach into the community; it puts more eyes and ears out to seek grant and donor opportunities; it helps create and at the same time demonstrate community goodwill; and gives the advocacy positions of the CBA both greater weight and greater visibility. Lastly, a larger membership base will help ensure a sufficiently large cadre of volunteer skills to be able to plan and implement the ambitious goals and objectives of the CBA. While important, the revenue derived from dues is less significant than the impact created by the size and reach of an active and involved membership.

Recommendations: The Review Panel recommends that the CBA engage in a sustained effort to raise its individual membership base to a target number of 300 within the next two years and to thereafter maintain it at or above that level. The panel further recommends that the CBA consider a staff-supervised or operated program for membership recruitment, retention and service. Board and staff members should all participate in the search for quality members, and court especially those with community access and professional backgrounds of potential benefit to the CBA.

The CBA should also recruit a business membership, concentrating on those that depend upon or have an impact upon the bay. The board should consider complimentary public service memberships for certain stakeholders, including county and municipal agencies and community organizations. The offer of business and public service membership will serve the secondary purposes of increasing the visibility of the CBA and its programs within the community, while at the same time illustrating broad community endorsement of its aims.

17. **Organizational Image:** The CBA has periodically been publicly visible in its outreach and public education role. It is also known and respected among regulatory agencies, county and municipal officials, environmental engineering firms, and other technical experts. Despite its outreach activities, and its broad recognition at the professional level, there appears to be only minimal awareness of its mission and accomplishments among the public - much less any sense of community ownership. To be an effective community advocacy organization, a broad segment of the public must be aware of it, recognize and appreciate its mission, and take pride in its accomplishments. The CBA is a serious organization with an important role to play in the community. In order to further establish community trust, it must not only present itself well to the public. It must prepare its correspondence and newsletters, keep its records, maintain its premises, and conduct its board and public meetings in such a way as to impart confidence in its efficiency and professionalism.

**Recommendation:** The panel recommends a comprehensive and sustained marketing program to place and maintain the CBA before the public as the expert on and trusted single-point steward of the Choctawhatchee watershed. The concern for fish and wildlife should be a muted but explicit part of this effort. The measure of success of such a program will be an appreciable increase in quality membership, volunteers, donations, grants, in-kind contributions, and substantial community support of organizational objectives.

The panel recommends that meetings of the board be conducted on a monthly basis, that they be thoroughly staffed in advance, so as to focus deliberations and facilitate decisions by the board. Afterwards, the staff should prepare comprehensive minutes, with follow-up tasks and responsibilities well understood. The panel further urges that public membership meetings be more frequent than once a year, that they be particularly well thought out and orchestrated, and that an effort be made to obtain the greatest possible attendance.

The CBA may wish to obtain the advice of local marketing and media experts in developing such a program. Steps to increase visibility could range from window stickers to radio plugs to a persistent presence at a wide range of community events. The objective would not only be to get the CBA name, mission and work before the public eye in a sympathetic way, but to sell it as an organization operating actively in favor of issues identifiable to the public – including particularly water recreational activities.

18. **Funding:** Whether from contributions, donations, grants or contracts, funding is the lifeblood of an organization. Realistic planning requires that this funding be predictable from one year to the next – or at least a core portion sufficient to cover staff payroll and infrastructure. More broadly, organizational staying power will not be fully credible until sustainable funding is secured. Staff payroll and infrastructure requirements currently total about \$150,000, of which perhaps \$25,000 can be more or less reliably counted upon from current sources. This means that at least \$125,000 must be solicited in the near term from new sources, not accounting for any expansion in programs.

While the CBA has been fortunate in being able to secure steadily increasing amounts of funding over the past several years, this funding has had to be solicited anew each year from a changing array of sources. At present, the CBA programs are vulnerable, inasmuch as two major grant sources - one state and the other federal - account for over eighty percent of program funding. The CBA provides public education, water sampling and analysis, and estuarine research services of use to public agencies. Despite this, there is no routine funding from the FDEP or from Okaloosa or Walton counties; only Destin has ever provided funds by budgetary allocation.

Panel enquiries indicate that Okaloosa and Walton counties comprise an untapped source of grant funds both on an opportunity and on a recurring basis. For example, Okaloosa County has recently been advised of two grants and a trust fund available from the state with possible applicability to the CBA (information already conveyed to CBA). The window of opportunity to secure these funds is typically very small, and consequently liaison with the county planning office is essential.

Recommendations: The panel recommends that the CBA intensify its efforts to identify and secure a sustainable funding base, to supplement already-existing in-kind contributions. As noted above, a reasonable target figure would appear to be \$125,000. Specifically, the panel urges that the CBA formulate a strategy to win support via annual budgetary allocation from both Okaloosa and Walton County, and from those municipalities that border the Choctawhatchee Bay. The CBA should also take advantage of all opportunities to work through the counties to obtain available state grants or other funds.

The panel recommends that the CBA be prepared in the near term to capitalize on its work on stormwater planning and on the water quality assessment study. As noted above, both projects promise to generate a variety of projects from the counties and municipalities. There is a possibility that the CBA could provide consultation on a revenue basis, as well as implement certain smaller projects.

The panel recommends that the CBA establish a committee of the board for the purpose of identifying grant opportunities and writing project proposals. At some point, it may be worthwhile to hire a part- or full-time grant specialist.

Finally, the panel is intrigued by the prospect – in the long-term - of a mitigation bank within the Choctawhatchee Basin. It urges that the CBA initiate a dialogue on this issue with both the FDEP and the Water Management District, with the idea of investigating potential cooperative work on a revenue-generating basis. The CBA might be able to work out a role in which it could function on a paid or fee basis as a broker to such a bank.

19. The Mission Statement: The current CBA mission statement talks about “optimum utilization” of the Choctawhatchee Bay. The statement could be more direct and forceful, while at the same time extending the organizational vision to the beauty and economic vitality of the Bay region. Such a statement would be consistent with community concerns. At the practical level, it broadens the alliance concept and should serve to draw additional membership, donors, volunteers and working partners under the CBA umbrella.

Recommendation: The panel recommends recasting the mission statement. Following is a possible redraft:

*“The Choctawhatchee Basin Alliance, operating in affiliation with Okaloosa-Walton Community College, is a broad-based community organization dedicated to promoting the ecological health, and the sustained aesthetic, recreational and economic vitality of the Choctawhatchee Bay and its associated river systems.”*

20. The Strategic Plan: The current strategic plan is direct and brief; it appears to be based upon solid science, as set out in the document *Breaking New Ground*. Many key portions of the plan have been implemented, while others have proven too ambitious. In any case, management milestones and measurement criteria to assess plan implementation appear to be lacking. The current plan is of three-year duration; this appears to be somewhat brief for the implementation of long lead-time tasks, the funding of which first needs to be organized.

Recommendations: The panel recommends that the board begin drafting a new strategic plan of five years duration. Perhaps the best time to put that plan into operation would be as soon as some of the key findings of the current water quality assessment are discernable. The panel also recommends that the chairman assign individual board members responsibility for monitoring each of the strategic goals. The board member should propose funding possibilities, and establish milestones and criteria to measure plan implementation.

The board may also want to consider conforming the strategic plan to the actual standing programs of the CBA, either as identified above by the panel, or however eventually defined by the board. For example, Strategic Goal No. 1 might be “Outreach and Public Education”, Goal No. 2 “Estuarine Water Sampling and Analysis”, Goal No. 3 “Watershed and Habitat Restoration”, Goal No. 4 “Stormwater Research and Coordination”, etc. Specific objectives and projects would then be lined up under the goals.

The substance of any new strategic plan must be the work of the board and staff of the CBA. Nonetheless, the panel notes the proven utility of a computer-based geographic information system, and urges that its acquisition be made a priority in the plan. See also the discussion of an estuarine research institute below.

21. Financial planning: Initial panel investigation found that the CBA lacked an adequate set of financial management tools – particularly an income and expense schedule. A schedule of projected income and expenses allows the staff and board to verify that the organization has the wherewithal to achieve its strategic goals for the upcoming year, and to prioritize and control expenditures. A schedule of actual income and expenses is a key element in the executive director’s end-of-year report to the board and to the college.

Recommendations: The panel recommends that the CBA maintain a system of accounts distinct from – and more detailed than - those required by college audit. In particular, the new income and expense schedule that the executive director is developing should be completed as soon as possible, and be updated on a quarterly basis. The CBA should estimate the cost of in-kind contributions by the college and other donors in order to enable it to respond to matching grants. It may wish to expressly incorporate these in-kind cost estimates into yet an additional “master” income and expense schedule. This would allow the board to have an understanding of the full cost of sustaining the CBA and all its programs.

22. The OWCC advantage: The OWCC affiliation is a defining characteristic of the CBA. It provides a home and critical basic support. But more importantly, it confers upon the CBA a

unique credibility as an impartial agency for research and best management practice and a trusted advocacy instrument for the bay and watershed. It also helps to assure donors of responsible management of funds and projects. No other regional organization canvassed by the panel has a collegiate sponsor.

Recommendation: The panel recommends that the CBA not only retain its strong ties with the college, but search for ways to further capitalize on this unique affiliation in a manner that can forward its mission within the community and enhance its prestige. In particular, the panel suggests that the CBA consider over the next few years the establishment of a seasonal estuarine institute oriented on regional high school students. In the course of time, this institute may be able to develop a range of coursework and research offerings of interest to regional colleges and universities.

23. Effectiveness within the Community: The panel questions whether the CBA can remain relevant and grow without asserting itself more boldly and confidently as a community player. As noted above, federal and state law will very soon require the implementation of stormwater plans for local municipalities. Such plans, taken together with probable action recommendations growing out of the water quality study, will present new opportunities and impose new tasks upon the CBA. The CBA may be in the best position to mediate between environmental and economic growth interests. In so doing, the CBA may be obliged to move out of its traditional comfort zone and assume more forward-leaning advocacy and action roles on water quality and even large-scale land use issues than it has in the past. The CBA can fill an important role by providing solid scientific information to decision-makers, raising questions about the impact of potential development projects, and suggesting more ecologically sustainable alternatives.

Recommendation: The panel recommends that the CBA leadership be actively responsive to community needs as it comes to perceive them. It should deliberately work to position and present itself as the single point expert on and steward of the Choctawhatchee Basin, that is, the essential trusted, non-partisan “go-to” organization for information, facilitation, mediation or action. In so doing, it will have to meet the complex challenges of educating and persuading the public on water quality issues, identifying and recognizing the interests of both public and private stakeholders, and generating consensus among them.

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## Appendix

Following are supplementary comments and suggestions by the review panel:

### On Membership:

A membership recruitment and maintenance program should have goals both by number and composition. The ideal is to acquire “quality” members – those who are motivated to support the goals of the CBA as well as those are placed professionally so as to be able to help concretely.

For the first several years of its existence, CBA had board members who were also staff employees of the FDEP, NFWMD and Eglin AFB’s environmental office. They comprised unofficial but useful liaisons between their organizations and the CBA. Such members can keep the CBA informed of developments, and can represent the CBA sympathetically within their organizations. We suggest that an effort be made to reactivate this liaison.

The CBA needs members from the northern regions of Okaloosa and Walton counties in order to create some degree of representational balance. Perhaps it would be possible to establish a Choctawhatchee River “satellite” organization in Washington and Holmes counties. At a minimum, it would be useful to get a few volunteers to sample water from upriver. It is possible that such members might be recruitable from Audubon Society lists.

Both the CBA staff and board members (especially committee chairmen) will need volunteer support on a more or less regular basis. It has been said that in every volunteer organization, there appear to be ten percent who actively support it, and about five percent who are willing to take office or fulfill committee responsibilities. If we take this statistical relationship to be literally true, a projected membership of 300 will yield perhaps 30 volunteers who may be available on an occasional basis; of these, 15 could possibly be expected to be available on a predictable or regular basis.

Once the CBA has acquired a certain magnitude and composition of membership, it is important to publicize it. This validates the CBA to the community, draws enquiries, and lets public officials know that the organization is serious.

Data on individual members is a valuable operational resource for any organization. There is software available for maintaining membership lists; that software should facilitate a search by name, by locality, by profession or particular skill, by group affiliation (e.g. Kiwanis, Audubon Society, Chamber of Commerce membership), by special experience, and by volunteer interest. Much of this information will be input from application forms and some will be acquired as a consequence of staff or board contact with the member.

The CBA should consider a small number of honorary or “adjunct” (non-voting) board member positions. Such positions could be a means of bringing into the CBA individuals of unique access and influence within the community...officers in banks, realty institutions, corporations, etc. These typically are people who do not have the time to be active board members, but have the means to assist the CBA in either a tangible or intangible way, and would perhaps not be part of the CBA if they were not given a VIP-status position of some kind. Adjunct board membership also constitutes a way to honor past board members; the continued participation of such members would help to maintain the institutional memory of the organization.

As membership expands and diversifies, the potential for dissent, friction and embarrassment will increase. The source could be overzealous, partisan or even disgruntled members. On the whole, however, the advantages of an active and involved membership outweigh the risks posed by a larger membership base.

People frequently join an organization because they support its cause. But they become active and participate in membership meetings and events only if participation in the organization remains both meaningful and enjoyable. While general membership meetings must accomplish real CBA business, they should also have a social and networking aspect that members can look forward to.

Procedures should be developed for surveying and tracking members' interests, opinions on the CBA, and type of volunteer work for which the member would be willing to make a commitment. The staff could conduct surveys by telephone, email, or mail. Such surveys could either be informal or formal, via telephone, email or mail, with or without use of a questionnaire. At least twenty percent of the membership should be polled at a time in order to obtain a valid sample. Surveys would also help the board in assessing whether recruitment efforts are yielding the type of membership desired.

Memberships should be run on a twelve-month basis, starting from date of joining, in preference to all memberships ending at the close of the calendar year. This not only spreads out the workload for the staff, but avoids the prospect of members receiving – and resenting – yet another bill during the peak holiday season.

There should be two general membership meetings per year – one for annual business and the other an essentially celebratory social event constructed around work accomplished by staff and volunteers. The business meeting should occur in January, after the holiday crush is over. Alternatively, it could occur in May, before the distractions of summer. The second meeting could take place either in late September or October. The annual business meeting should occur in an appropriate conference room, either on campus, or in some other “serious” venue. The second meeting could take place in less formal venue – such as the Kelly Estate (see comments below on meeting-room and parking limitations at this facility).

On Organizational Image:

The CBA should have a more striking and attractive logo (or logos) than that currently in use. In the best of marketing tradition, the purpose is to create a visual association of the CBA with an image viewed as positive by the community. Three-color logos are more effective than two. Ideas include a representation of water, seagrass and a species of fish typically associated with the Choctawhatchee Bay, or a representation of wetlands and a waterfowl typical to the area. There might be two interchangeable logos to appeal to different segments of the community. These might be made into window decals or other distributable material, and combined with suitable mottos (e.g. “CBA – Planning for a Beautiful Bay” or “CBA – Supporting a Healthy Habitat”). The college fine arts department or graphics branch may be of some assistance in devising such logos.

Staff and board members should have distinctive business cards printed with both the college and the CBA logos.

The CBA should consider sponsoring the periodic preparation of a polished, substantive video on the natural history of the Choctawhatchee watershed for free distribution to local civic groups, schools, etc. Again, the Fine Arts Department, assisted by the Science Department of the college, may be of some assistance.

The CBA may consider the preparation of a calendar featuring professional-quality photography of the Choctawhatchee Bay, local rivers, Dune Lakes and seashore. It may find a partner in the Tourist Development Council. The primary purpose of the calendar would be to profile the area, reach out to the public with environmental messages, and to make the public aware of the CBA and its mission. The calendar should be priced to sell at or somewhat above cost, and would almost certainly have immediate appeal to both residents and visitors to the Panhandle. Eglin AFB/Jackson Guard already has a folio of photography that it is prepared to share for this purpose. The Audubon Society, the local horticultural extension agent, the FDEP, or the US Fish and Wildlife Service may also be willing to assist.

The CBA could consider sponsoring or having a prominent presence in several high visibility recreation programs (because water quality is also relevant to recreation). An example would be a regionally publicized annual river run by canoe and kayak. This would focus attention not only on the Choctawhatchee River, but also on the CBA as its steward. The CBA could also participate in some activities not immediately related to water quality, but which are related to the bay or river. An example would be a presentation on the cultural history of the area (e.g. the early naval stores background, paddle wheel boat travel on the Choctawhatchee River). By partnering with the Ft. Walton Indian Temple or the Heritage Museums, the County Library or the OWCC history department, the CBA could further establish its community presence.

The CBA is physically invisible in the community. It should consider having a high quality sign installed at the Kelly Estate, visible from the road. State, county and municipal statutes permitting, there might also be signs in Destin at SR 98 and Main Street, and at Main Street and Indian Bayou Trail. The Mattie Kelly Arts Foundation may agree to share both the signs and the cost of the signs with the CBA.

The CBA website and newsletter are two vital means that the CBA has of both getting its message out and enhancing its image. The CBA website has recently gone through an extensive upgrade. Future improvements to that website might include a three month calendar of events, and links to useful sites and sister organizations (e.g. FDEP, NFWFMD, Alabama Rivers Alliance, Bay Area Resources Council, etc.). The CBA should continue to expand and polish its newsletter, and send it out both by mail and email on at least a quarterly basis. The newsletter should include a message from the Executive Director. The panel suggests that it be distributed not just to CBA members and volunteers, but more widely, to selected public officials and community organizations.

#### On Funding:

The water quality monitoring assessment is a success story for the CBA and its supporters simply from the standpoint of having been conceived, funded and initiated. The assessment is in its implementation phase now. While it is too early to second-guess the conclusions, it is not too early to begin thinking about both the program and funding implications for the CBA of its findings. The assessment might conclude that water quality in the bay is generally not as adverse as had been thought. Or it might find that it is worse in some ways than thought. Unexpected pollution outfalls might be discovered. In either case, it will raise additional

questions needful of study; there will therefore be deserved funding opportunities. The CBA should be flexible in posturing itself for new or supplementary research and action proposals.

As noted above, panel enquiries have revealed that Okaloosa and Walton counties may comprise an untapped source of grant funds both on an opportunity and on a recurring basis. For example, Okaloosa County has recently been advised of so-called “Water Conservation” and “Land and Water Conservation” grants from the state. There is also a “Boating Improvement Trust Fund” which may be applicable to certain CBA programs. Such projects may either be large enough to be of interest to local environmental engineering firms, or small enough for the CBA to be able to implement by itself. While state projects must be sponsored and implemented through the counties, it is up to municipalities and qualified organizations to take the initiative to identify work and submit project requests. In any case, it appears a reasonable function of the CBA to be alert for such grants, and be prepared to submit proposals through the county. Many such grants require a very rapid response. The window of opportunity to secure these funds is typically very small and may therefore require a very rapid response. Thus continuous CBA liaison with the planners and/or public works offices in both counties is advisable.

The CBA is not in competition with local environmental engineering companies for research, consultation and program implementation. The CBA has been fortunate in securing the active support of these organizations, and considers them to be among the “Alliance” alluded to in the “CBA”. The CBA role should continue to be that of facilitator and broker – passing to the environmental engineering companies any information on potential projects, which are larger or more complex than the CBA can accomplish by itself.

County support via budgetary allocation is occasionally made available to non-profit organizations that can perform a useful service more efficiently than the county (e.g. Red Cross and United Way). The CBA should consider exploring this issue with Okaloosa and Walton county managers, public works officials or elected representatives, based on CBA water quality monitoring activity and other “public service” character work. The best time to do this is prior to closeout of county project proposals for the upcoming fiscal year (March).

The Northwest Florida Water Management District recently initiated a mitigation bank in Washington County and is itself managing it. The Review Panel suggests that the CBA investigate how it was established, and whether a similar bank could be created in the Choctawhatchee Basin. Prospective development at the eastern end of the Choctawhatchee Bay suggests the potential for a mitigation bank in this area – and a possible arena for CBA action.

#### On The Strategic Plan:

The panel has not yet seen an assessment of how well the strategic plan was implemented. We presume that that will be done, together with an analysis of why certain goals were not achieved. Our impression is that the strategic plan goals were set high – perhaps to motivate the board and the membership, and to stake out CBA claims within the community to a relatively large area of interest. If so, it has achieved its purpose, and the next cycle of strategic planning should be for effect – that is to say, with reasonable and community-supportable goals, achievement milestones and a clear implementation path.

The panel encourages the acquisition of a hydrologic/hydraulic model for the Choctawhatchee Bay. This would not only be useful for predicting and tracking stormwater outfalls, but would be an asset for an estuarine institute, should the CBA establish one.

Similarly, the CBA should pursue on a priority basis the acquisition of a geographic information system (GIS) as a tool not only for labeling and tracking outfall and sampling locations, but also for constructing a hydrologic model of the Bay. If it cannot be obtained within the terms of the current water quality assessment contract, it might be expedient and cost efficient to extend the contract in order to acquire an operational GIS. As a tool it would add greatly to the credibility of the CBA as focus of expertise on the bay, and would be key asset in any estuarine research institute.

The Panel urges that the CBA consider sponsoring an estuarine and water quality conference or workshop at two-year intervals (the last one was FutureBay, in September 2001). The purpose would be, alternately, to implement the outreach and public education program, and to further the estuarine research program of the CBA. The next event might be a workshop to present the findings of the water quality assessment, and exchange views with other experts on solutions to problems raised.

#### On Financial Planning:

The Panel suggests that the CBA maintain a ledger of equipment, indicating for each boat, boat engine, hydrolab or other major equipment when it was received, what its original cost was, the cost of repair, etc. Such assets may be able to serve as counterpart organizational contributions to matching grants.

Just as the CBA prepares an income and expense statement, it should also prepare an asset and liability statement. This should be done on a quarterly basis throughout the accounting year – and for similar control and management purposes.

We suggest that the CBA re-establish monthly board meetings. Regular board deliberations are vital for any organization engaged in a complex menu of activities. It is also important for any organization handling money, but essential in view of the increased funding that the CBA has recently enjoyed. Increased funding usually draws increased scrutiny from auditors. Monthly board meetings assure that the staff does not run out too far ahead of the directors. Regular and documented board direction also constitutes an essential protection for the chairman of the board and the executive director. For purposes of transparency, telephone or email transactions relating to money or other significant issues should be documented and placed in file for scrutiny by other board members.

#### On the OWCC Advantage:

The Panel encourages the CBA to utilize as fully as possible its affiliation with the college. This could redound to the mutual benefit of both the college and the CBA. As noted above, one example of this would be a request for the support of the Fine Arts Department in developing a logo. Another might be the collaboration of the Science Department in preparing a video on the Choctawhatchee watershed. Yet another could be a joint project with a marketing class within the Business and Computer Sciences Department to develop a strategy for the CBA to enhance its organizational image.

#### Miscellaneous:

The Mattie Kelly Estate – a waterfront location in Destin's Indian Bayou - is a large and very attractive property, and provides a dramatic backdrop for the CBA. Its use as the offices for the

CBA is invaluable at this time, and it has great potential as a venue for an estuarine research institute. However, its out-of-the-way location may work against the visibility that the CBA needs in order to have maximum impact on the community. At some point in time, the CBA might wish to review not only its facility requirements but also its physical location. In the meantime, the Panel suggests that the CBA consider ways to achieve a fuller utilization of the property. To assist in accomplishing this it is essential to improve parking. An extension to the present meeting room would also be useful. Together, these two steps would make membership meetings and other events feasible regardless of the weather. In addition, as membership grows, or as an estuarine institute becomes a reality, the CBA might consider a modest expansion incorporating both classrooms and laboratory facilities. At that time, a small dock or landing would allow direct access to the bay without the need to travel to one of the marinas currently hosting CBA vessels.

There is free software available from various sources for non-profit organizations. An Internet search should help locate donor corporations and distributors. Such software could help with membership databases, financial records, and project management.

The CBA should look into memberships and affiliations with various regional and national professional associations focused on estuaries and wetlands. One example is the Gulf Estuarine Research Society. Being a member of a larger organization with common interests can enhance the credibility and effectiveness of the CBA, while helping assure that the staff is made aware of new projects, techniques, and funding opportunities. The executive director or staff may also wish to participate occasionally in conferences and seminars. At some point - perhaps in the wake of the current water quality assessment - a representative of the CBA may wish to present a scientific paper on the Choctawhatchee basin. This would provide the opportunity for broad comment and suggestions by professional peers.

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