

Thoreau Farm-Thoreau Society Potential Merger Next Steps: Priorities, Potential, and Process

Our next steps focus on incorporating your feedback to help shape an organization ready to carry Thoreau's legacy into the future. Over the coming months, the Working Group will draft core documents for a potential new entity.

This has been—and will continue to be—a thoughtful, multi-phased process. Each stage is designed to build shared understanding, assess viability, and ensure that any merger is rooted in community-informed decision-making and a deep understanding of organizational dynamics. Mergers bring both challenges and opportunities—from aligning missions and cultures to addressing organizational gaps and building capacity. They require careful planning, transparent dialogue, and strategic investment.

Far from a transactional move, this potential merger represents a strategic evolution—one aimed at increasing effectiveness, scaling impact, and strengthening governance and financial practices in alignment with 21st-century standards.

Priorities

As part of this ongoing process leading to a vote, the working group and both boards are committed to prioritizing those aspects of the existing organizations that are integral to our work and the value we provide to our community. We aim to:

- Champion Thoreau's life and work as touchstones for today's pressing issues.
- Ensure Thoreau's ideas reach a wide audience for broad consideration and deep exploration.
- Maintain the Farm as a vibrant, place-based education center.
- Protect the identity of the Society as a cutting-edge scholarly community with a deep history and wide distribution.
- Continue our publications and programs so we can invite more dialogue and engagement.

Potential

We recognize that our community discussions raised questions and ideas related to the immediate potential this merger might unlock as well as the short-term and long-term potential of a unified organization.

While nothing happens automatically, our deliberate and engaged merger process enables us to put the right pieces in place so some things would happen immediately with a merger:

- Immediate savings in time and expenses would enable bringing on more staff to build our capacity to serve members and the general public.
- A unified banner immediately helps us capitalize on the renewed interest in Thoreau that we expect to see following the March 2026 release of the Thoreau documentary produced by Ken Burns.
- New organizational structure and combined assets immediately open up additional fundraising potential.

As with any nonprofit, the board would set the annual goals for the organization. However, through this deliberate process, in which board members have been deeply engaged and which the community has given a lot of input, a vision has begun to emerge of where we want to be in the not-too-distant-future. We recognize in our community discussions and in our internal board discussions, shared hopes for how Thoreau can be shared and understood across the world

and in all communities. Many of these hopes have been long-held dreams, or are recurring themes in old board minutes. With the greater resilience, stability, and capacity of a merged organization, and again, the careful process we are in, those strategic goals have also come to the foreground.

- Expand the audience for the Thoreau conversation by engaging young people, people from all walks of life, school and university partners, families, and community organizations from across the world.
- Build a vital center for cutting-edge research that welcomes a broad public into conversations about sustainability, ecology, health, history, creativity, justice, writing, and spirituality.
- Provide more meaningful support to emerging and established scholars and writers across disciplines and languages, through Fellowships and fellowship.
- Encourage engagement with the natural world through infrastructure investments (connector trail to Battle Road Trail; education barn, etc.) and formal and informal educational programming.
- Establish an endowment sufficient to support a healthy organization, vibrant community, and continued work bringing Thoreau to the world.

Which of these goals to focus on first is part of the detailed planning we are embarking on now.

Process

We have reached this point of developing a concrete proposal for a merger after thoughtful multi-phase process over the last 21 months of careful consideration of how our mission to share Thoreau with the world can be strengthened in a world that faces a lot of uncertainty.

1. Initiation (December 2023 - March 2024)

We began with early discussions to identify the motivations, needs, and strategic aspirations behind a potential merger. This phase focused on building trust, aligning intent, and assessing readiness for deeper collaboration, rooted in the growing strength of our Write Connection partnership and the close relationship between our two Executive Directors.

These discussions were limited to the Boards and both Executive Directors, with some confidential consultation with three separate outside strategic advisors who provided guidance on process and gave us the first sense of what might be possible. A formative conversation with Joe Wheeler on February 9, 2024—two days before his passing—challenged us to think fifty years ahead about the world we hope to shape.

At the close of this initiation phase, both Boards agreed to enter a formal feasibility phase to explore whether and how a merger could proceed.

2. Feasibility (April 2024 - February 2025)

We then undertook a feasibility assessment to evaluate the strategic fit of a potential merger, focusing on mission alignment, financial health, and organizational structures. This phase enabled all parties to make an initial determination about whether moving forward was possible.

During this phase we transitioned to a shared Executive Director. We also began to include additional stakeholders in the discussion on a very limited basis. This included beginning to discuss the possible merger with staff, existing and potential partners, and key donors.

Legal feasibility was reviewed by our pro bono legal team at McDermott Will & Emery LLP, and an independent financial assessment was conducted by an external reviewer. The Working Group also held a retreat facilitated by Rebecca Riccio of the Social Impact Lab to support deeper analysis and reflection.

At the conclusion of this feasibility phase, both Boards agreed that a merger was viable and voted to move into a discovery phase to assess whether a merger would be advantageous.

3. Discovery (February 2025 - July 2025)

During the discovery phase, we engaged in more in-depth due diligence with a closer look at leadership capacity, culture, programs, and stakeholder relationships. This phase emphasized learning and transparency, with opportunities for candid input from the broader community.

This phase included a column announcing the potential merger in the *Thoreau Society Bulletin*, mailed to the membership, several email blasts to both organizations' lists, and multiple public listening sessions, including two on Zoom and three in-person at Thoreau Farm. Each and every occasion was accompanied by a call for feedback, input, and questions.

At the end of this phase, encouraged by the community feedback and in response to the demand for additional details, the Boards voted to move into a planning phase of merger discussions.

4. Planning (July 2025 - *anticipated November 2025*)

Once mutual interest and alignment were confirmed, we supported the development of a detailed merger plan. This included setting clear goals, defining roles and responsibilities, assessing resource needs, and outlining a realistic timeline for integration.

We are currently in the planning phase, preparing the steps necessary to bring the merger proposal to a formal vote by both Boards and the Thoreau Society membership. No final decisions or implementation would occur until after the official votes.

If the Boards and membership vote **no**, Thoreau Farm and the Thoreau Society will return to separate strategic planning efforts.

If the Boards and membership vote **yes**, the merger will move into the implementation phase, which includes integrating operations and providing the technical, financial, and capacity-building support needed to ensure a smooth transition and long-term success.