

Thoreau Farm – Thoreau Society Merger FAQs

We are excited to engage in this discussion with our members, partners, and friends. We recognize that people will join the conversation from different perspectives, different levels of involvement in the ongoing work of the organization, and with different approaches to brainstorming and decision-making. We hope this FAQ sheet will help answer some of the common questions about the process and possibilities we see ahead. This will be a living document, and we hope to add any additional recurring questions as they arise. We also anticipate some of the answers evolving as our community moves through this process. If your question is not answered on this sheet, please email it to Rebecca or to a member of the working group.

Thank you,

The Thoreau Society-Thoreau Farm Working Group

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Why consider a merger?

Our two organizations have always been closely aligned. Key members of the Thoreau Society, especially Joe Wheeler, led the movement to preserve Thoreau's birth house, and as Thoreau Farm has established itself, the partnership between it and the Thoreau Society has deepened – including a shared executive director. Our two organizations complement each other, and a merger would broaden our reach and amplify our work while gaining some welcome efficiencies.

The potential efficiencies represent some cost and time savings, but also increased stability and sustainability for the new merged organization during a time when uncertainty plagues the nonprofit field. Our community, board, volunteers, and staff would all benefit from this streamlined organizational management.

Each organization is currently able to evaluate a merger from a position of strength, not vulnerability. This allows us to think beyond the practicalities of organizational survival and focus instead on the possibilities that a merger provides for achieving greater long-term viability and reaching for bigger goals.

What is the role of Thoreau Society membership in this process?

Formally, the Thoreau Society membership is only empowered to vote on changes to the bylaws. The Thoreau Farm Trust does not have an equivalent voting body; bylaw changes are voted on by their board.

Informally, the Thoreau Society membership and the communities connected to each organization are invaluable to this process because you represent the core of our work, both our primary audience and our primary source of strength. The knowledge, skill, time, and consideration you lend are what powers these organizations. We hope you will see this process

as an exciting opportunity to dream big for the future of sharing Thoreau with the world. We want your ideas about who we should be reaching, or how we should be presenting content, or where we should be looking for inspiration—and how all those ideas might shape a new merged organization.

If you are hoping to get more deeply involved in one of the aspects of our work, through committee work or volunteering, please reach out and let us know. Many of our most critical activities are volunteer-powered and we rely on your expertise and energy.

What is the timeline for a merger?

We began discussing the possibility quietly over a year ago. Several board members from each organization met regularly to assess the feasibility of a merger and examine the risks and opportunities. This included a careful look at the logistics of merging the two organizations from a legal, financial, and administrative standpoint—none of which presented roadblocks. These representatives reported back to and consulted with their full boards, who agreed that a merger presents many exciting opportunities.

Broader discussions with our community, including Thoreau Society membership, about the value and direction of a merged organization are ongoing now in Spring 2025 through the Annual Gathering in July 2025. We encourage everyone to share their input throughout this process and after, as the work of ensuring our dynamism as a community and organization is ongoing.

Depending on how the discussions go, we can bring a motion to approve a merger to the Thoreau Society membership and to the Thoreau Farm board in early fall 2025, with new bylaws that reflect a resilient and sustainable governance structure. We could begin 2026 as a combined organization.

How do the TF and TS missions compare?

They are very similar (see the At-a-Glance Comparison chart). Both focus on bringing Thoreau's legacy to our current world. Thoreau Farm focuses on the birth house as an education and writing center in Concord, embedded in a community of engaged citizens, reaching an audience of educated non-specialists eager to connect with history and ideas, and welcoming visitors of all ages and backgrounds. The Thoreau Society fosters an international conversation among scholars and enthusiasts focused conferences, publications, and the Thoreau Prize, with a crucial foothold at the Shop at Walden Pond.

A new merged organization could provide unparalleled opportunities to engage with Thoreau in deep, personal, and deliberate ways in order to make meaning in the world.

What are the key activities of both organizations? Would they change?

Thoreau Farm focuses on place-based education with tours of the birth house, the Sauntering Society, the Writer's Retreat at Thoreau Farm, and other programs. The Write Connection – a series of author talks and writing workshops – is already a strong program in partnership with the Thoreau Society. Thoreau Farm also publishes the book series *What Would Henry Do?: Essays for the 21st Century*.

The Thoreau Society focuses on the conversation among Thoreau enthusiasts and scholars, from visitors to the Shop at Walden Pond to participants in the Annual Gathering, to members who read and publish in the *Thoreau Society Bulletin* and *The Concord Saunterer*. The Society also administers the Thoreau Prize for Literary Excellence in Nature Writing, award two annual fellowships, and manage our archival collections housed at the Walden Woods Project Library.

We don't anticipate losing any of these core activities in a merged organization – only building them up based on our shared and complementary strengths, increased staff capacity, and unified public identity.

What are some of the pros and cons of a merger?

There are many benefits to a merger. A larger combined organization will be more resilient, with more efficiencies in operations, better prospects for grant-funding, and more ways for those people who are interested in Thoreau's enduring ideas to engage with us. The Thoreau Society would gain a real home in Concord, a place for members to gather and learn. Thoreau Farm would connect to an international community of Thoreau scholars and enthusiasts. Together, a new combined organization could dream big about how to bring Thoreau's legacy to bear on our most challenging problems.

We considered the risks carefully. There's always some uncertainty in combining organizations. Members and friends closely connected to either organization might feel less connected to the merged organization. The place-based focus of Thoreau Farm might not fit easily alongside the broad, dispersed conversation of the Thoreau Society. The academic rigor of the Thoreau Society might get diluted in a larger, more broadly focused organization. The goals of both organizations – a trail connecting to the Battle Road for Thoreau Farm, for example, and fostering the development of young scholars for the Thoreau Society – might not be widely shared among both organizations. We have thought these through carefully, and we're confident that we can address these risks as we move forward.

How would a new merged organization care for the Thoreau birth house?

The Thoreau Farm Trust will continue as the legal entity and owner of the birth house and surrounding land, with funds dedicated to maintaining the property. It will operate with a new set of bylaws that will structure the workings of the new, combined organization, but the house and its emergency funds will remain protected. The merger will allow us to better realize the long-standing vision for the birth house as a vital educational center for bringing Thoreau's legacy to our world.

How are the finances of the two organizations?

Both organizations are in sound financial shape (see the At-a-Glance Comparison chart). Each goes through regular financial reviews, and an independent financial expert examined the finances of both organizations to see if a merger would pose any undue risks (in her view, it

wouldn't). The Thoreau Society has a larger operating budget and more staff than Thoreau Farm; Thoreau Farm holds the largest asset as owner of the birth house and surrounding land.

Each organization also has restricted funds designated to specific projects or functions. Those funds will necessarily remain restricted and committed to their intended purpose.

A new merged organization would eliminate some redundant administrative work and expenses, freeing up staff time and money to devote to programs or long-term projects.

What personnel do the organizations have?

Both organizations currently have a half-time executive director; these roles are filled by one person. Thoreau Farm employs several docents to lead house tours. The Thoreau Society has a part-time membership coordinator, a full-time shop manager, and several shop employees. Both have volunteer boards of directors: seven for Thoreau Farm; fifteen for the Thoreau Society.

A new merged organization could be organized to bring on additional staff to support programming or outreach.

What are the logistics of a merger?

If the decision to merge is made, and both the Thoreau Society membership and the Thoreau Farm board vote to adopt new bylaws, then several legal, financial, and administrative steps will take place, all supported by outside experts. This includes our pro bono law firm that has committed to helping us through the legal process and filings with the State of Massachusetts. The legal process will ensure that existing contractual commitments are upheld and documented, particularly those related to restricted funds.

Understanding the various logistical processes and identifying outside support for them was a key component of considering the feasibility of a merger. They have been reviewed carefully but none has been initiated. Having identified that this merger could work legally, financially, and functionally, we are now deliberately considering how it might work for our community and what benefits it may have for a combined mission of sharing Thoreau.

What will the name of the merged organization be?

This is still under discussion, and we'll welcome your input at the appropriate time. We're currently exploring several possibilities and anticipate engaging a design and communications consulting team—funded by a grant—to help shape how a new, merged organization is introduced and presented publicly. Our mission, future goals, and how we define our current and future audiences will guide the external outreach process, including the naming. As such, those decisions will follow our ongoing internal conversations about what we hope to achieve—conversations in which we hope you participate.

How would the new organization work?

For members of the Thoreau Society and friends of Thoreau Farm, not much would change and the key features of both organizations would continue.

We anticipate a period of transition for the governance structure. The Boards of Directors would be combined, and over several years settle down to a manageable size, likely meeting quarterly as a full board. Committees would meet more regularly to manage the many areas of the combined organization. We anticipate an Executive Committee, made up of the current presidents of both organizations and at least one board member from each previous organization, would steer the new organization for the first years. Detailing this structure will be a key task in drafting new bylaws.

We anticipate keeping all of our existing staff who work at the Shop at Walden Pond and who give tours of the birth house. A new combined organization might find opportunities to grow this competent, knowledgeable staff.

How would a merger affect our partnerships with other organizations?

We believe becoming a single, larger organization would improve our partnerships by allowing us to offer more to the many partner organizations we value. We work closely with the Walden Woods Project, the Walden Pond State Reservation, Gaining Ground, the Robbins House, Louisa May Alcott's Orchard House, the Concord Free Public Library, the Concord Museum, and many other organizations in and around Concord.

We also work closely with the Fuller Society, the Emerson Society, and the Alcott Society, and we frequently collaborate with other author and scholarly societies. We participate in the American Literature Association, the Association for the Study of Literature and the Environment, and the Modern Language Association.

All of these partnerships would continue; some, like the Thoreau Society collections curated by the Walden Woods Project and the lease of the Shop at Walden Pond from the Massachusetts Department of Conservation and Recreation (DCR), are legal contracts that will remain in force. The nonprofit landscape in and around Concord is crowded, and we have a stronger presence and voice as one larger, more robust organization.

How might a person engage with the combined organization?

There would be lots of points of connection with a combined organization. One goal of the merger is to provide more ways of joining the Thoreau community and more ways of participating in the many things we do. Some possible examples:

A poet interested in place-based writing might find her way to a writing program put on in the birth house, attend a Thoreau Prize event, share her work at an Annual Gathering, and publish in *The Concord Saunterer*. A conservation biologist based in the Boston area might attend a public lecture co-hosted by us, research our conservation history in our collections housed at the Walden Woods Project, and partner with us in developing a citizen science program. A new local resident might stop by the Shop at Walden Pond, join a Sauntering Society excursion, and become a regular at our events, helping lead local adult education efforts. An out-of-state college

student might stop by Walden Pond, learn about our research opportunities, and find a lifelong scholarly home in our community.

It's easy to imagine a host of similar stories — our goal is to build a welcoming home and a vibrant community for everyone who finds that Thoreau's writing has planted a seed we can all help grow.

What can I do now?

We are hoping that this phase of the discussion is community-powered and vision-inspired. We encourage you to engage often and in as many ways as you are comfortable.

First, please make sure that your contact information is up to date with us. We want to be able to stay in touch through this process and this is the first step.

Next, please mark your calendars for our Open Forum sessions. We hope you will tune in or show up, and add your ten cents (it's the tariff-era two cents!) to the conversation.

Also, talk to your friends who are connected to these organizations, or who might want to connect with a new merged organization, about what you envision for the future of sharing Thoreau with the world. Encourage them share their thoughts with us over email or during an Open Forum conversation. We know from the history of the Thoreau Society that through conversation we can activate each other's best ideas.

We recognize that this is a challenging time for communities across the U.S. and around the world, and we are deeply aware of the privilege we have to operate in relative safety. By merging organizations, we could free up resources and actively pursue goals that have too often remained stuck in discussion. However, we know we can't do everything at once. That's why we're seeking your input—through our Open Forums, your emails, and your comments—to help us identify the most urgent priorities for this moment, the long-term goals you envision for us, and whether you believe a merged organization is the best path forward.

Please share your thoughts with us.

At-a-Glance Comparison of Thoreau Farm / Thoreau Society

Topic	Thoreau Farm	Thoreau Society
History	Founded in 1999 to preserve Thoreau's birth house Opened in 2010 to the public	Founded in 1941 by a community of enthusiasts and scholars Housed at Thoreau Lyceum (1970s-90s) Housed at Walden Woods (1990s) Housed at Thoreau Farm (2010-)
Mission	<i>The Thoreau Farm Trust is committed to preserving Thoreau's birth house and promoting Thoreau's extraordinary insights into life, nature, and social responsibility. It offers educational programs and presents his birthplace and its surrounding landscape as a source of inspiration for living deliberately, practicing simplicity, and exploring new ideas for positive change.</i>	<i>The Thoreau Society exists to stimulate interest in and foster education about Thoreau's life, work, legacy, and his place in his world and ours, challenging us all to live a deliberate, considered life. The Thoreau Society keeps Thoreau's writing and ideas alive around the globe and across generations.</i>
Key activities	House preservation House tours <i>What Would Henry Do?</i> Book series Sauntering Society Writer's Retreat at Thoreau Farm The Write Connection writing workshops and author events	Annual Gathering Publications (<i>Thoreau Society Bulletin</i> and <i>Concord Saunterer</i>) Shop at Walden Pond Thoreau Prize Archival Collections (at WWP Library) Fellowships (two per year)
Personnel	Executive Director (part time) Docents (four, part time) Board (seven)	Executive director (part time) Membership coordinator (part time) Shop manager Shop associates (three, part time) Board (fifteen)
Community	Active Donors: 234 Facebook Page: 3900 Instagram Followers: 1175 Mailchimp Subscribers: 1718	Active Donors: 888 Current Members: 773 Library Subscribers: 59 Facebook Page: 5600 Facebook Group: 16,300 Mailchimp Subscribers: 4319
Budget Snapshots	<i>FY2025 (July 2024-June 2025)</i> Income: \$92,000 - Fundraising: \$26,000 - Earned Income: \$66,000 Expenses: \$88,000 - Facility expenses: \$25,000 - Admin expenses: \$52,000 - Other expenses: \$11,000	<i>FY2026 (April 2025-March 2026)</i> Income: \$160,000 - Shop: \$45,000 - Annual Gathering: \$24,000 - Fundraising: \$55,000 - Membership: \$36,000 Expenses: \$150,000 - Publications: \$35,000 - Admin expenses: \$115,000
Assets	House Investments: approx. \$145,000 (excluding the restricted funds that support the Write Connection and Thoreau Farm Trail)	Collections Investments: approx. \$55,000 (excluding the restricted funds that support the Thoreau Prize, TCCA Fellowship, and Harding Fellowship)