

## Thoreau Farm – Thoreau Society Proposed 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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#### *1) Why consider combining these two organizations into one new one?*

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 for the last 15 months. Our two organizations complement each other, and a merger could broaden our reach and amplify our work while gaining some welcome efficiencies.

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 new organization could provide for achieving greater long-term sustainability and reaching for bigger goals.

We want to stress that our proposal is a concept at this point, not a detailed plan. If, after extensive conversation with our community, the two boards agree it's worth moving forward, we will draft legal documents, including new bylaws and careful plan for a transition. We're not there yet.

#### *2) 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 and reaching an

audience of educated non-specialists eager to connect with history and ideas. The Thoreau Society fosters an international conversation among scholars and enthusiasts focused on conferences, publications, and the Thoreau Prize, with a crucial foothold at the Shop at Walden Pond.

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

Thoreau Farm focuses on place-based and online 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 21<sup>st</sup> 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*. It also administers the Thoreau Prize for Literary Excellence in Nature Writing, awards two annual fellowships, and manages its archival collections housed at the Walden Woods Project Library.

The working group doesn't anticipate changing any of these core activities in a new organization – only building them up based on our shared and complementary strengths.

4) *What are some of the pros and cons of a merger?*

There are likely 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 are considering the risks carefully. There's always some uncertainty in combining organizations. One risk is perception that one organization is being "acquired" by the other. Another is that 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 will continue to think these through, and we're confident that we can address these risks as we move forward.

5) *How do the finances of the two organizations look?*

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.

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.

*6) What will happen to the Thoreau Society and membership in this new organization?*

The Thoreau Society, with its history as the oldest society dedicated to an American author, will continue to play a central role in a new combined organization. There will continue to be an international membership and a host of activities and programs that foster cutting edge scholarship and bring Thoreau's message to the world. As with membership in other nonprofit organizations, this membership would have the currently existing benefits: receiving publications, access to programs, and discounts. We have discussed keeping the name "Thoreau Society" for the membership body of the new organization, but this will be determined as part of a professional branding process that takes into account all of the legacy names, logos, etc.

*7) What is the timeline for a merger?*

The working group began discussing the possibility 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 preliminary look at the logistics of creating a new organization from a legal, financial, and administrative standpoint. These representatives reported back to and consulted with their full boards, who agreed that a combined organization presents opportunities worth exploring further. Staff and key partners were brought in to the discussion last summer, and we have been expanding the conversation over the last few months.

Broader discussions with both communities are ongoing. The Thoreau Society hosted Open Forums on May 4 and June 10 and the Thoreau Farm conducted a Forum at the house on June 22 to engage interested persons and hear opinions, questions, and ideas.

To date, the general consensus suggests that moving forward is worthy. Some concerns such as the name of the new organization, governance structure, protection of core programs and assets, branding, and identity were surfaced. To date, it is evident that new initiatives, new programs, and new services – as a result of a merger – have yet to be identified.

Legal documents outlining the details of consolidation are not yet available for discussion and debate. The next step is for the working group to work on governance for a new organizational structure. Depending on how the discussions go, and after the creation of new bylaws, both organizations could move to approve a new organization with those new bylaws by the end of 2025. We could begin 2026 as a combined organization.

*8) 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 will include legal work to represent each organization and to establish and record new governing documents with the State of Massachusetts. The legal process will ensure that existing contractual commitments are upheld and documented, particularly those related to restricted funds and birth house ownership.

9) *What personnel do the organizations have?*

Both organizations currently have a half-time executive director; these roles are filled by the same 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 evolve to bring on additional staff to support programming or outreach or other goals as determined by the new board.

10) *How would the new organization work?*

The key features of both organizations would continue. We anticipate a period of transition for the governance structure. Detailing this structure will be a key task in drafting new bylaws.

The Boards of Directors would be combined into one, 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. The Executive Committee – made up of the current presidents of both organizations and at least two board members from each previous organization – would lead the new organization.

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.

11) *What will the name of the merged organization be?*

This is still under discussion. The combined mission, future goals, and how to define current and future audiences will guide the naming.

We anticipate engaging a design and communications consulting team to help shape how a new, merged organization is named, introduced, and presented publicly. Public input will be part of this process. We have already acquired some funding to support this part of the process.

12) *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 – the 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.

### *13) 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.

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. 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
<b>History</b>	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-)
<b>Mission</b>	<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>
<b>Key activities</b>	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)
<b>Personnel</b>	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)
<b>Community</b>	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
<b>Budget Snapshots</b>	<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
<b>Assets</b>	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)