

# Texas Chapter ISA

## 2018-2021 Strategic Plan

Dec. 12, 2019 Board of Directors Update



### **INTRODUCTION**

This strategic plan was created to support the activities of the Texas Chapter – International Society of Arboriculture. The plan is designed to guide the organization for a three-year period, during which annual plans of work and specific budgets will be developed, administered, monitored, and evaluated.

### **VISION STATEMENT**

ISAT created a vision statement that describes the end result that the organization and its members are working toward: *Texas communities are enhanced when trees and urban forest resources are cared for and managed by qualified professionals using best practices.*

### **MISSION STATEMENT**

The updated mission statement summarizes the purpose of the organization: *Empower members to provide professional arboricultural and urban forestry services through education, research, and networking, creating greater public awareness of the value of trees.*

### **GOALS and OBJECTIVES**

In order to make progress towards achieving the ISAT vision and fulfilling its mission, specific and measurable goals and objectives have been adopted by the ISAT Board of Directors. The goals are broad statements of big-picture activities that can be monitored and evaluated.

Activities can be divided into two categories of objectives: **on-going** objectives that maintain the organization, and **innovation** objectives which are areas of organizational growth that help the chapter become more efficient and effective, and to have a broader impact. On-going objectives are typically the same from year to year (though they may be addressed in new ways) and provide for the continued, orderly administration of chapter operations. Innovation objectives are new initiatives that will help the organization grow and prosper. Some innovation objectives will be completed and the organization will move on to other initiatives, while other innovation objectives will move to the on-going category in future years.

The following on-going objectives and innovation objectives will guide the organization in the next three years:



**GOVERNANCE GOAL: Ensure organizational capacity and structure that supports a healthy chapter.**

ON-GOING OBJECTIVES	INNOVATION OBJECTIVES
<ul style="list-style-type: none"> <li>● Maintain a transparent nomination and election process</li> <li>● Ensure compliance with state and federal regulations for non-profit status and risk management best practices</li> <li>● Conduct annual planning retreat to evaluate strategic goals, and orientation of new Board members</li> <li>● Hold regular board meetings and an annual meeting for members</li> <li>● Maintain chapter records and filings</li> <li>● Maintain a governance committee that regularly reviews bylaws and policies</li> <li>● Maintain an Executive Committee that manages operational functions</li> <li>● Maintain a finance committee with regular Board review of finances</li> <li>● Represent Texas at the ISA level (CoR, Credentialing, Chapter Execs, Operating MOUs)</li> <li>● Collect, track, manage, and report financial information, taxes, and accounting in accordance with standard accounting procedures</li> <li>● Staff and support an ED position and other contract staff as determined</li> <li>● Maintain member and Credential holder data</li> <li>● Maintain a communications system for members, the public, ISA, and partners</li> <li>● Develop an annual budget that supports organizational activities, as well as future growth, while striving for a positive net revenue               <ul style="list-style-type: none"> <li>● Create policy and procedure manual using existing materials and other chapters' materials for reference</li> <li>● Determine appropriate staffing levels to meet organizational needs</li> <li>● Evaluate options for prudent management of reserve funds</li> <li>● Develop policies to address issues of risk and ethics - MAINTAIN</li> </ul> </li> </ul>	<p><b>Top 5 Priorities</b></p> <ol style="list-style-type: none"> <li>1. <b>Develop a succession management plan for all EC, Director, and Committee Chair positions, as well as future ISAT staff</b></li> <li>2. Develop a master calendar of organizational (planning and deadline) requirements and activities listing responsible role/positions.</li> <li>3. <b>Develop clear job descriptions and duties for staff, board and volunteers as part of a Board Manual</b></li> <li>4. Develop a volunteer management system including volunteer coordinator position description, recruiting and retention process, and a Volunteer Management manual</li> <li>5. Build pathway to recruit future board members, committee members and volunteers</li> </ol> <p><b>Additional Priorities</b></p> <ul style="list-style-type: none"> <li>● Explore alternative revenue sources such as additional sponsorships, merchandise and grants</li> <li>● Examine efficiency of current operations and ways to leverage current efforts</li> <li>● Develop a plan to increase the diversity of membership, the Board, and partnerships</li> <li>● <i>Explore methods of reaching the younger generation of arborists</i></li> <li>● Consider alternative models for supporting members, such as working to support regional urban forestry groups</li> <li>● Develop framework for bidding out staffing contracts on a routine basis</li> </ul>



**MEMBER SERVICES GOAL: Provide services in an efficient manner that result in value for members, access to credentialing, and facilitates opportunities for networking**

ON-GOING OBJECTIVES	INNOVATION OBJECTIVES
<ul style="list-style-type: none"> <li>● Hold annual Texas Tree Climbing Championship event</li> <li>● Provide newsletter 6 times annually</li> <li>● Provide monthly TreEmail</li> <li>● Maintain Social Media accounts, such as Facebook page, Blog, etc.</li> <li>● Complete update of oak wilt web page</li> <li>● Continue providing Oak Wilt Qualification credentialing</li> <li>● Maintain an ISAT office for members to interact with (phone number, email address, etc)</li> <li>● Provide non-members attending events the opportunity to become members</li> <li>● Provide members with volunteer opportunities that support the organization and contribute to their professional development</li> <li>● Maintain credential support including testing, CEU's, and point of contact</li>   <li>● Expand Texas Tree Conference and Trade Show Wednesday night social to provide additional networking opportunities</li> <li>● Explore advertising opportunities (newsletter, website)</li> <li>● Continue to work with Texas A&amp;M Forest Service to develop Wildfire Risk Reduction Qualification credentialing</li> </ul>	<p><b>Top 5 Priorities</b></p> <ol style="list-style-type: none"> <li>1. Explore technology development, to engage ISAT members through the use of technology. Evaluate additional social media platforms including discussion forums</li> <li>2. Pursue additional opportunities for networking</li> <li>3. <b>Coordinate annual day of service opportunity for members (pris and Misti)</b></li> <li>4. <b>Develop a three year plan to recruit, involve, and retain ISAT members. (Misti - Membership Services)</b></li> <li>5.</li> </ol> <p><b>Additional Priorities</b></p> <ul style="list-style-type: none"> <li>● Plan for additional member outreach</li> <li>● Membership services plan</li> </ul>



**EDUCATIONAL GOAL: Support continuing education programming to meet the needs of members**

ON-GOING OBJECTIVES	INNOVATION OBJECTIVES
<ul style="list-style-type: none"> <li>● Manage, promote, and facilitate educational events according to annual work plan</li> <li>● Provide relevant digital and print materials to support members' continuing education</li> <li>● Host annual Texas Tree Conference, Trade Show, Academy and Tree School</li> <li>● Hold Texas Tree Climbing Championship and, pre-climb workshop</li> <li>● Publish newsletter that provides industry updates and educational information to members</li> <li>● Continue to offer Oak Wilt Qualification training</li> <li>● Maintain education committee that plans and implements events               <ul style="list-style-type: none"> <li>● Partner with other allied industries to support events</li> <li>● Develop mechanism for event participant survey data tracking</li> <li>● Explore structuring annual conference sessions to offer relevant material for allied professionals</li> <li>● Increase Spanish language workshops by one each year for next 3 years</li> <li>● Explore getting access to ISA's EventMobi app for Texas Tree Conference</li> <li>● Host educational event/arbor fair at Texas Tree Climbing Championship</li> <li>● Work with Texas A&amp;M Forest Service to offer Wildfire Risk Reduction Qualification training</li> </ul> </li> </ul>	<p><b>Top 5 Priorities</b></p> <ol style="list-style-type: none"> <li>1. Make conference/workshops available for purchase/viewing for those who cannot attend</li> <li>2. <b>Explore streamlined methods for event management and operational details (Educational Committee/Executive Committee)</b></li> <li>3. <b>Plan for a branding and marketing mechanism to increase event attendance (Educational, Member Services)</b></li> <li>4. Basic tree care workshop for rural (ex-urban) areas</li> <li>5. <b>Create a 3 year educational event plan covering diverse content, teaching levels, and geography (Educational Committee)</b></li> </ol> <p><b>Additional Priorities</b></p> <ul style="list-style-type: none"> <li>● <i>Host two webinars for members</i></li> <li>● Explore translation at existing workshops</li> <li>● Partner with TCIA for arborist apprentice program</li> <li>● Partner with TAMU to develop field diagnostic guide for pest/pathogens</li> </ul>



**PUBLIC AWARENESS GOAL: Foster greater public awareness of credentialed arborists and proper tree care**

ON-GOING OBJECTIVES	INNOVATION OBJECTIVES
<ul style="list-style-type: none"> <li>● Maintain a public facing portion of website</li> <li>● Support statewide Arbor Day observances</li> <li>● Outreach to allied professional groups</li> <li>● Send newsletter and TreEmail beyond chapter members and make available digitally on website</li> <li>● Offer academic tuition and conference registration scholarships to college students               <ul style="list-style-type: none"> <li>● Make allied professional CEU’s available as applicable at ISAT events</li> <li>● Host arbor fair in conjunction with Texas Tree Climbing Championship</li> <li>● Develop a strategy to increase ISAT presence at allied professional conferences (Board member, exhibit booth, volunteer, attend, offer as speaker)</li> </ul> </li> </ul>	<p><b>Top 5 Priorities</b></p> <ol style="list-style-type: none"> <li><b>1. Develop a plan for public awareness that includes goals, platforms for information dissemination (Outreach Committee)</b></li> <li>2. Establish framework for service projects (e.g. annual work day, storm recovery) to the public/community</li> <li>3. Promote ISAT professional development opportunities to allied professionals</li> <li>4. Kids climb/Limb walk – build framework for use and adoption globally</li> <li><b>5. Explore how to promote/leverage Texas Tree Climbing Championship (Outreach Committee, TTCC)</b></li> </ol> <p><b>Additional Priorities</b></p> <ul style="list-style-type: none"> <li>● Video tree climbing event and post to website/promote               <ul style="list-style-type: none"> <li>● Host two webinars for allied professionals</li> </ul> </li> <li>● Promote and leverage Tree City/Campus/Line USA programs</li> <li>● Develop and promote chapter speaker roster</li> <li>● Actively promote ISAT newsletter articles to other audiences               <ul style="list-style-type: none"> <li>● Develop public communications plan for disseminating information to the state during a natural disaster</li> </ul> </li> </ul>



**RESEARCH GOAL: Promote and support arboricultural research**

ON-GOING OBJECTIVES	INNOVATION OBJECTIVES
<ul style="list-style-type: none"> <li>● Maintain current donation to TREE Fund</li> <li>● Enhance partnerships with universities to explore research opportunities</li> <li>● Support Tour de Trees riders</li> <li>● Offer grants for Texas-specific research and find technology transfer methods within the state</li> <li>● Maintain a TREE Fund liaison position</li> </ul>	<p><b>Top Priorities</b></p> <ol style="list-style-type: none"> <li><b>1. Strategize for future development of in-state arboriculture researcher or extension faculty in partnership with TFS, USFS, and AgriLife Extension (Governance)</b></li> <li>2. Encourage applications to the TREE Fund for Texas-focused research proposals</li> <li>3. Update policies for promoting and supporting research, fundraising, etc.</li> <li><b>4. Develop criteria for undergraduate research related to the industry. (Research and Scholarships)</b></li> </ol>

**STRATEGIC INITIATIVE – BUILDING CAPACITY**

Strategic initiatives are specific areas of focus for the organization during the time covered by the plan. In this plan, one significant strategic initiative is put forth. In order to achieve some of the many ideas proposed as innovation objectives, it will be necessary for the ISAT to build additional capacity. The ISAT is experiencing symptoms of burnout among Board members and volunteers and has limited contractual staff available. Capacity building is about finding ways to get more things accomplished – it pertains to the group’s ability to deliver its mission more effectively now, and in the future. Capacity building is an investment in future sustainability and effectiveness of the ISAT. Growing capacity may require changes to the way the organization has been run in the past, additional allocations of time and resources, and the dedication and determination of the leadership.

There are three levels at which the ISAT can build additional capacity – within the Board, the Volunteers, and the Staff. The ISAT Board of Directors has developed the following strategy to build additional capacity for the organization during the next three years:

**ISAT Capacity Building**

<b>Board</b>	<b>Volunteers</b>	<b>Staff</b>
<ol style="list-style-type: none"> <li>1. Develop clear roles and job descriptions, including determining tenure for committee chair positions</li> <li>2. Identify staffing level tasks for various employee needs</li> <li>3. Conduct a job task analysis of board members to identify tasks best suited for staff versus BOD</li> <li>4. Hire an administrative assistant to handle details for the organization</li> <li>5. Set goals for different staffing levels and make a quality vs quantity determination</li> <li>6. Reorganize Board member committee assignments and roles to separate governance and operation duties</li> <li>7. Develop a framework for Board member mentoring</li> <li>8. Develop annual goals for committees</li> </ol>	<ol style="list-style-type: none"> <li>1. Develop a formal volunteer coordinator position</li> <li>2. Designate a volunteer coordinator for the annual conference and other events</li> <li>3. Create a volunteer coordination manual including volunteer position descriptions and Board policies</li> <li>4. Leverage the volunteer capacity of Master Gardeners, Master Naturalists, AgriLife Extension, and other relevant organizations such as regional urban forestry groups</li> <li>5. Incentivize and recognize volunteers</li> </ol>	<ol style="list-style-type: none"> <li>1. Conduct a job task analysis to determine what current Executive Director tasks can be moved to other potential positions</li> <li>2. Develop a clear annual work plan for Executive Director and other contractors</li> <li>3. Identify and prioritize staffing needs by category – Administrative, Event Coordination, Volunteer Coordination, Outreach, and Executive functions</li> <li>4. Conduct a budget analysis – what can we afford, determine if opportunity for incentives is appropriate, what are our expectations?</li> <li>5. Explore how we can use Executive Director and/or additional contractor to take time pressures off of Board members</li> </ol>

**CONCLUSION**

The Texas Chapter of ISA has been successful over the last forty years by being an opportunistic organization. In the next three years, it will remain opportunistic, but will become more strategic in its approach. Guided by this strategic plan, the organization will advance its mission, benefiting both its members and Texas communities.