



Wisconsin Arborist Association Strategic Plan 2010-2014

Final draft prepared by

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Final edit complete April 20, 2011, by Linda Barcz, Ed Bodus, Cathy Brodbeck, Rich Hauer, Brian Pelot, Eric Peterson, and Laura Wyatt.

Background: In the spring of 2009, the Board of the Wisconsin Arborist Association (WAA) determined the need to develop a new strategic plan. Joe McLennan, a consultant who had worked with the Board two years earlier, was asked to help design and facilitate a Board planning retreat, write the retreat summary, and create the initial and subsequent drafts of the plan. McLennan's offer to help with the first steps of implementation of the plan was also accepted.

A Board Task Force assessed the 2005 to 2009 plan with the report shared with the Board prior to the planning retreat on October 15 and 16. The general sense was that a good plan had been created, but there was continuing difficulty securing the help needed to implement key sections of the plan.

While the last plan did not have a vision statement, the Board in its retreat decided the vision statement would be a useful addition to the 2010 to 2014 plan. Although recommended by the consultant, the development of a set of value/belief statements for the Association was not specifically considered during the retreat.

This initial draft of the plan was sent to the Board for its comments, reviews, and suggestions with formal discussion occurring at the December 2009 Board meeting. One of the key components of that interaction was coming to an agreement on the specific goals and possible milestones for each of the strategies that have been outlined. The plan was fine tuned throughout 2010 while several of the plan action items were also being implemented.

The contents of the plan which follows have been suggested by the previous plan, the discussions at the October Board retreat, and McLennan's work with other membership organizations including the International Society of Arboriculture (ISA) and the ISA's Southeast Chapter. Edits from Board members are incorporated into this document.

The recommendation is that once the Board reaches preliminary agreement on the goals and milestones, then these strategies can be turned over to the appropriate work group(s) (Board committees or task forces) to develop the specific action plans which will then be presented to the Board for further discussion and approval. **The focus of future WAA Board meetings should be on the decisions that need to be made based on these action plans.** In some cases, an entire Board meeting could be devoted to one strategy.

NOTE: The "Strategies" (previously described as "Goals" in the last plan) are ordered according to the priority understood by the facilitator coming out of the October retreat. The "milestones" are intended to be measuring guides for progress in a particular strategy. These can be altered and reprioritized by the assigned work group. How these milestones will be achieved is up to each work group.

**Wisconsin Arborist Association
2010-2014 Strategic Plan**

OUR VISION

A primary resource for WAA members to promote the profession of urban forestry and arboriculture in Wisconsin.

OUR MISSION

Improving the understanding and appreciation of trees and the practice of arboriculture.

STRATEGIES AND PRIORITIES

1. Improve WAA's Organizational Structure
2. Promote the Value of Membership
3. Sustain Education
4. Increase Public Awareness of the WAA

The Wisconsin Arborist Association (WAA) was founded in 1964 by a small group of individuals dedicated to improving the knowledge and quality of the profession of arboriculture. Since that time, it has grown into a large organization of commercial, municipal, utility, and academic arborists. These members serve Wisconsin by providing private and public arboriculture services and research. The WAA is a chapter of the International Society of Arboriculture which has representation in over 30 countries.

1. Improve WAA's Organizational Structure:

Long-Term Goal: Improve the overall confidence level of the Board in understanding and implementing its roles and responsibilities.

Milestones:

- A. By May 1, 2011, a Governance Committee will be established. They will need orientation and training from Joe McLennan.
 - Detailed description and purpose of committee.
 - Help to keep the Board focused.
 - Cory Gritzmacher will help to spearhead.

- B. By July 1, 2011, we will have our policy and procedures manual in place. The manual will include job descriptions for the WAA Board members. This includes the Board President, each Board officer, Ex-Officio Members, and Committee Chairs (if not a Board Member). This will include a list of what we do on a regular basis and who is to do it. We will ask the people who perform the tasks to create a detailed explanation of the process/steps. Job descriptions will be part of this, but it will also include a calendar of activities and how they are done.
 - Mutual expectations description to be included.
 - This document should allow future Board and committee members to know the what, when, why, and how of their responsibilities.
 - Defining the structure of each committee will be part of this.
 - Include operating principles for committees.
 - The job descriptions and calendar will be reviewed and updated once per year.
 - Draft timeline for each committee by May 1, 2011.

- C. By September 1, 2011, we will have developed a process for Board member end-of-term interviews.

- D. By September 1, 2011, we will have developed and piloted a Board member recruitment process that includes a well thought-out orientation process.

- E. By January 1, 2012, we will have Board and Committee development training in place.

- F. By January 1, 2013, we will have a pool of potential candidates for the Board and for Board officer positions. These individuals will know Board member responsibilities.

- G. By January 1, 2013, we will develop long-term strategies to ensure we are operating in a cost-effective manner while providing sufficient funds to support our strategic initiatives.
 - Reserve fund equal to at least one year of operating expenses.
- H. By January 1, 2015, we will have designed and completed at least three Board orientation programs.

2. Promote the Value of Membership

Long-Term Goal: WAA members will recognize and appreciate the value of membership as determined by the results recorded from periodic member satisfaction surveys.

Milestones:

- A. By February 1, 2011, a new approach to annual business meeting will have been done for a second time with the goal of increased interaction between the Board and members. Evaluate if we will continue with this format in future years.
- B. By September 1, 2011, a baseline of current participation of members in programming and committees will have been confirmed. (This is the number of people involved by committee now.)
- C. By January 1, 2012, a new member orientation program will have been successfully piloted as evidenced by a number of new committee members.
 - Strategy to define and set up systems for committees to involve more people (and feed into future leadership positions).
 - Incorporate with Goal 1.A. work to be sure this happens.
 - Create a checkoff box on the WAA application to ask if applicants want to be contacted to be involved.
- D. By January 1, 2012, a method to track membership retention will have been established.
- E. By January 1, 2014, a membership retention rate will have been stabilized at 85 percent.
- F. By January 1, 2015, increase members active on committees and Board by 50 percent.
 - Compare to 2.B. above.
- G. By January 1, 2015, membership will have increased to 800 paid members.

- H. By January 1, 2010, 2012, and 2014, a membership satisfaction survey will have been completed and results will be used to expand or contract services as appropriate. Results will indicate that WAA is seen by members as a reliable knowledge center/clearinghouse.

3. Sustain Education

Long-Term Goal: Sustain/create education and research and promote/encourage ISA certification programs and services which are known for their high quality and practical use.

Milestones:

- A. By January 1, 2010, the intent of publishing and distributing a newsletter to members on a quarterly basis will have been met.
- B. By January 1, 2011, the annual conference will have piloted at least two new program tracks for conference participants.
- C. By July 1, 2011, an audit of current programs will have been completed with recommendations for those which need to be maintained, changed, or dropped.
- D. By July 1, 2011, the program committee will have at least one participant from each of the member categories.
– Include in Policy Manual.
- E. By each annual conference, proof is provided that a minimum of 15 ISA Continuing Education Units (CEUs) have been made available to all members in the previous calendar year.
– Include in Policy Manual.
- F. By January 1, 2011, new programming and services, developed as a result of the suggestions made in the membership surveys, will have been being piloted/tweaked.
– Include in Policy Manual.
- G. By January 1, 2013, WAA's calendar of education, training, and certification programs for the tree industry will have received statewide acclaim.
- H. By January 1, 2014, WAA will have presented an average of four educational awareness events for the public and three education events for our members each year. At least two of them will have been the result of a co-venture with an allied group.

- I. By January 1, 2014, WAA will have awarded 40 hours of CEU credit: 35 percent in arboriculture practices, 30 percent in tree science, and 35 percent in management.
 - Promote new certifications (BCMA, Tree Worker, Municipal, Aerial Lift).

4. Increase Public Awareness of the WAA

Long-Term Goal: WAA is acknowledged as a valuable resource for our membership for issues having to do with the urban forest/arboriculture. Over time, there will be an increase in education and knowledge of elected officials and the public.

Milestones:

- A. By January 1, 2011, will have explored Web site and social media for use to achieve WAA goals.
- B. By January 1, 2012, a list of potential allied organizations will have been developed and prioritized for possible co-ventures, partnerships collaboration, etc.
- C. By January 1, 2013, a marketing and public relations strategy will have been developed using input from outside experts and resources. (Consultant may be needed.)
- D. Each year, the Web site has an increase of 20 percent for hits to the Certified Arborist for Hire and Educational sections of the WAA Web site.

Additional Goal-Related Tasks

Goal 4. WAA Board will have to evaluate to see if they want to pursue:

- Work with the LEAF program by January 1, 2014, to design a program for elementary schools on urban tree appreciation. (Select two to work with.)
- Include SSA and students groups.
- Link our Web site to WLCA and WPRA (other potential partners).

Goal 1. By January 1, 2012, a fund development group will be in place to coordinate and develop ways to increase donations for scholarships, Tree Fund, or other needs as deemed necessary.

- Increase the number of WAA members participating in fundraising efforts.
- By January 1, 2014, WAA past presidents will have completed fundraising for the Bob Skiera fund totaling \$100,000.
- Investigate opportunities for donations to the Tree Fund (i.e., Trees are Good license plates).

- Investigate revenues from the sale of publications and training materials (ISA).

Goal 4. By January 1, 2013, WAA's new family of pamphlets and brochures will have received recognition at regional and national award ceremonies.

Future Ideas for Consideration

1. Reevaluate this long-term goal in 2015 to see if we should change the goal to: "WAA is acknowledged as the go-to source for any issue having to do with urban forestry."
2. Conduct a statewide audit of current market awareness including mentions in Wisconsin media to establish a baseline.
3. Included in the audit is a listing of the number of Wisconsin elected officials with whom WAA has a working relationship.
4. Four to five years after the survey in Goal 2 above, repeat the survey with a goal to reveal that name recognition of WAA and what it does has improved by ____ percent; number of media mentions has increased by ____ percent; number of elected officials known to WAA has increased by ____ percent.
5. Consider a focus on, or a plan for, college students as a separate goal.
6. Increase ISA membership within WAA by 10 percent by 2014.

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