



2005 Strategic Plan
May 25, 2005
(Retreat March 7, 2006)

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Executive Summary

The Colorado Tree Coalition (CTC) is a successful volunteer organization working to preserve, renew, and enhance community forests. This document records the discussion and decisions made at the April 9th strategy session of the Colorado Tree Coalition (CTC) Board of Directors. This session was the five year update of the CTC strategic plan. The document serves as an update to the CTC strategic plan and will serve as a guide for CTC's work in the coming months and over the next five years.

Based on board responses to a questionnaire given to the Board of Directors before the strategy session and the discussion at the beginning of the day, the strategy session focused on four interrelated areas for improvement for CTC over the next five years. These areas include (1) increasing the diversity of the CTC board, (2) communicating CTC's mission, vision, and programs to a broader audience, (3) expanding CTC's funding base and membership, and (4) expanding CTC programs.

Of these four, developing more effective ways to communicate CTC's mission, vision, and programs to a broader audience rose as a critical and challenging leverage point to help the organization expand, grow and succeed in board, membership and funding development over the next five years. To date, CTC has succeeded through the passion and commitment of its board of directors and the development of materials such as newsletters, a website, the growth of its grants program, and membership development. With this strategy session the CTC board is ready to take the organization to the next level of effectiveness. A summary of CTC's strategic plan elements and associated tasks over the next 5 years includes: (Also see page 14 for a more detailed timeline summary of the strategic plan).

NOTE: Changes incorporated at the CTC Board Retreat on March 7, 2006 are in **BOLD RED**

CTC Strategic Plan Elements Executive Summary

I. Board Development

II. Funding / Membership

III. Marketing / TPG

IV. Program Development

| | | | |
|--|---|--|--|
| <p>Goals</p> <ul style="list-style-type: none"> ▪ Board is both diverse geographically and professionally ▪ Active (Paid) Staff – Executive Director, Marketing, Fund Raising | <p>Goals</p> <ul style="list-style-type: none"> ▪ Retain existing members ▪ Connect with members after developing marketing strategy | <p>Goals</p> <ul style="list-style-type: none"> ▪ More press releases ... more exposure ▪ CTC is the first place for people to go for tree questions and answers ▪ CTC is recognized at the national level as an example of an effective non-profit ▪ Like Smokey Bear – everyone knows CTC ▪ All CTC programs receiving great visibility and exposure throughout the state ▪ CTC is visible and highly respected throughout the state | <p>Goals</p> <ul style="list-style-type: none"> ▪ Remarket current programs based on new communications strategy ▪ Expand and create programs as possible and funding allows |
| <p>Tasks</p> <ol style="list-style-type: none"> 1. Clarify roles 2. Identify board needs 3. Draft new board roles 4. Prioritize and recruit potential new board members 5. Annually repeat steps 2-4 as necessary to ensure board diversity 6. Consider revising how chapters appoint representatives to the CTC board - to make them more likely to do so. | <p>Tasks</p> <ol style="list-style-type: none"> 1. Send a renewal postcard. 2. Reconstitute the membership committee. (This effort will be informed by the work of The Passion Group or the membership committee could move within The Passion Group until CTC's marketing strategy is more fully developed. (see Marketing / TPG below) | <p>Tasks</p> <ol style="list-style-type: none"> 1. Evaluate the previous marketing report written by Creative, Inc. 2. Work with each existing committees to identify their marketing needs 3. Contact other like-minded organizations about their marketing strategy. 4. Create a marketing scope of work/ job description so CTC knows what it wants from a consultant. 5. Create budget for consulting work. 6. Advertise for marketing support as necessary. 7. Work with consultant (team) 8. Draft marketing plan 9. Begin implementing marketing plan | <p>Tasks</p> <ol style="list-style-type: none"> 1. Examine CTC and Trees Across Colorado collaboration (TAC) 2. Present draft proposal to full board 3. Implementation of collaboration might be possible until 2007. 4. Examine supporting Planning Commissions and Councils, tree boards, and membership, etc. through the following: |

Plan Elements

Based on the visioning exercise and the results of the board questionnaire, the board organized the results into the following plan elements. The plan elements are listed in the order discussed during the meeting.

I. BOARD DEVELOPMENT

The board of directors is a key element of success for any organization, but this is particularly true for a volunteer organization. The diversity of the board is one indication that the mission of the organization resonates beyond true believers. Consequently, the ongoing task of building and maintaining a diverse board of directors is a regular assessment for any organization involved in social and political change.

Goals

- Board is both diverse geographically and professionally
 - Utility Company (XCEL Energy and it’s counterparts in water and sewer folks)
 - Shopping Center developers and management company types on CTC board
 - Girl Scout and Boy Scout type representative on the CTC board
- Active (Paid) Staff – Executive Director, Marketing, Fund Raising

Evaluation - How do people currently get recruited to the CTC board?

- Personal invitation
- Local chapters (every chapter supposed to appoint a representative – several do not)
- Invited representatives

Force Field Analysis

+ What draws you to serve on CTC board?

- Encouragement from board members
- Desire to be an agent of change
- Accomplishing tasks and goals
- Passionate about trees
- People share in the work
- Give back to profession
- Pay expenses
- Fun group – 2 times
- Meet new tree people
- Passion for community forests
- Fun places for meetings
- Personal invitation
- Doing good at the local level
- Passion for trees
- Want to make a difference
- Networking
- High energy active group. Getting it done!

- What hinders people’s involvement on CTC board?

- Too many other commitments
- Don’t know about CTC
- Different focus – lost focus
- Don’t know about us
- Don’t know we need diverse people
- Time commitment – 4 times
- Everyone is busy
- Not knowing the commitment
- Hard work involved
- Distance involved – 3 times
- Fear of having to do to much (time constrains)
- Need connection between tree benefit and Corporate purpose
- Feel they get nothing in return
- We only communicate in our own circles
- Lack of support from their employers

The assessment of CTC’s current approach to board recruitment revealed a general sense that potential board members do not have a clear understanding of the commitment. Although CTC is a volunteer organization, there are several levels of involvement – from quarterly meetings to subcommittee work –and these varying degrees of involvement and time commitment should be better articulated in a CTC board packet. Board members discussed how the time commitment could be varied further through the development of an advisory board, which might meet only once a year. Based on the importance of a strong, diverse board to CTC’s success, the board members at the strategy session agreed to the following:

Next Steps:

Create a Board Subcommittee:

- Scott (**co-chair**)
- David H.
- **Keith (replaces Melissa)**
- Ralph
- Mike (**co-chair**)

| Tasks | Who | Timeframe |
|---|--------------|-----------------|
| <p>1. Clarify role of the board members, committee chairs, and potentially, an advisory board.</p> <p>a. get examples from other organizations such as Volunteers for Outdoors Colorado and review their board structure and various role definitions)</p> <p>b. clarify the roles CSFS and CTC play and show how CTC compliments CSFS. For example:</p> <p><u>CSFS</u></p> <ul style="list-style-type: none"> ▪ Withdrawing from community with increasing emphasis on fire ▪ Education ▪ Politics <p><u>CTC</u></p> <ul style="list-style-type: none"> ▪ Can fill a void created by CSFS ▪ Advocate ▪ Innovate ▪ Lobby ▪ Educate ▪ Voice of community forestry | Subcommittee | June 06 |
| <p>2. Identify potential board members (diversity geography, professionals [e.g., lawyers, marketers, sales, landscape architects])</p> <ul style="list-style-type: none"> • Each board member brings five names to full board for discussion | All board | April 06 |
| <p>3. Draft new board roles document to share with potential new board member (why, what, how, when, for how long, etc.)</p> | Subcommittee | June 06 |

| | | |
|---|---------------------------------------|--------------------------|
| <p>4. Based on board roles prioritize potential new board members and begin to approach potential new board members.</p> <ul style="list-style-type: none"> • Select best person and method to contact new potential board member (could be different for each potential member) | <p>All board led by subcommittee</p> | <p>August 06</p> |
| <p>5. At start of each year, repeat steps 2-4 as necessary to ensure board diversity.</p> | <p>Full board led by Subcommittee</p> | <p>January 07-09</p> |
| <p>6. After general board recruitment is well underway, CTC is to analyze and revise chapter representation to the CTC board. Review and edit by-laws to reflect all revisions.</p> | <p>Subcommittee</p> | <p>July 07</p> |
| <p>7. Develop job description for Executive Director.</p> | <p>Co-chairs</p> | <p>January 07</p> |

Board Resources

- **Community Resource Center** www.crcamerica.org
- **The Hauser Center for Nonprofit Organizations**
Kennedy School of Government, Harvard University
www.ksghauser.harvard.edu
- **Colorado Association of Nonprofit Organizations**
www.canpo.org
- **CompassPoint Nonprofit Services**
www.compasspoint.org
- **Nonprofit Genie**
Non Profit Management Assistance Partnership www.genie.org

Nonprofit Leadership and Management

Community Resource Center - www.crcamerica.org

II. **FUNDING/MEMBERSHIP (MOVE UNDER MARKETING & OUTREACH)**

Membership is the foundation of the CTC’s strength as a viable organization. Membership from individuals and organizations is another way to gauge the extent to which CTC mission and vision resonate with residents throughout the state.

| Funding | Membership |
|--|--|
| <ul style="list-style-type: none"> ▪ People supporting CTC through membership (“Giving for the Trees”) ▪ Utility company (XCEL Energy, Denver Water, and their counterparts) sponsorship of CTC ▪ State funds CF programs 50% ▪ Support of CTC by State government (other than CSFS) ▪ Organizations looking to donate \$ to CTC ▪ Funders come to us and give \$ ▪ We have sponsors coming to us ▪ Perpetual funding for people and the trees they plant and maintain ▪ Stable funding sources ▪ Not begging for \$ ▪ Established and reliable funding source ▪ People want to give us money for projects rather than us having to ask for it. ▪ Sponsored poster contest ▪ One major sponsor for CTC calendar ▪ Every household has a CTC calendar and they paid for it+ ▪ Projects in Colorado are funded by corporate sponsorship, membership, and partners of CTC ▪ \$ coming in from books, tours, calendars, workshops, merchandise ▪ sponsored calendar ▪ private funding 50% | <ul style="list-style-type: none"> ▪ Membership of 1000 people ▪ All communities are CTC members ▪ All Colorado communities are members of the CTC ▪ 10,000 members and many are actively involved |

Evaluation - How do people and organizations become members?

- Newsletter
- Brochures
- Word of mouth
- Website (with ability to contribute)
- Threats (there is a them here)
- Calendar

Although CTC has done a good job increasing its membership and funding from members, there has been a drastic drop in membership recently due to lack of renewals from the PLT group. The membership committee (Phil Hoefler) shared the actual numbers with the rest of the board.

Membership report – April 9

| | |
|--------------------|------------|
| COMP members | 36 |
| Individual members | 112 |
| Family | 22 |
| Business Community | 82 |
| Patron | 8 |
| Total | 260 |

These numbers include members with renewal dates going back to June 2004

Membership History

| TYPE | Apr 05 | Jan 05 | July 04 | Apr 04 | Jan 04 |
|--------------|--------|--------|---------|--------|--------|
| COMP | 36 | 39 | 44 | 44 | 44 |
| IN | 112 | 106 | 291 | 299 | 307 |
| FA | 22 | 22 | 24 | 24 | 29 |
| BU | 82 | 76 | 77 | 76 | 90 |
| PA | 8 | 8 | 6 | 7 | 8 |
| Total | 260* | 251* | 439 | 450 | 478 |

*Membership query is from June 2004 through December 2009.

- Major drop in IN members because of non-renewed PLT members.
- Phil Hoefer recommended that the CTC mail a letter or postcard to 239 people who haven't renewed their memberships since January 2003. However, the majority of these individuals were part of the PLT group.
- The board had a wide ranging discussion about the need for marketing expertise on the board. This led to the reformation of the communication subcommittee into a marketing subcommittee, otherwise known as "The Passion Group".

Goals

- Retain existing members
- Connect with members after developing marketing strategy

Next Steps:

| Tasks | Who | Timeframe |
|---|---|--|
| 1. Send a renewal postcard. There was no formal action on Phil's recommendation. Although much of the work related to funding and membership will be affected by The Passion Group's efforts, the board should make a formal decision on this recommendation. <ul style="list-style-type: none"> • Keep as much as existing memberships as possible. • Add check off for participation • Assign this renewal post card job and the database management to an administrative person. | All board Ralph | July 06 August 06 |

Funding and Membership Resources

- ***The Board Member's Guide to Fund Raising: What Every Trustee Needs to Know about Raising Money.*** By Fisher Howe, 1999.
- ***The Soul of Money: Transforming Your Relationship with Money and Life*** by Lynne Twist, 2003. www.soulofmoney.org
- ***The Nonprofit Membership Toolkit.*** By Ellis M. M. Robinson, 2003. Chardon Press. www.chardonpress.com

III. MARKETING (THE PASSION GROUP)

Reaching and attracting a new (and existing) members is another key element to CTC's efforts over the next five years. The tools and approaches CTC has developed to reach people throughout Colorado could benefit from professional marketing and communication expertise. Although the stories CTC tells Colorado residents and the systems CTC uses to "share the passion" have improved over the last five years (**the website is a great success**), but for CTC to achieve its mission and vision, CTC's marketing strategy must move to a new level.

Goals

- CTC is the first place for **communities** to go for **community forestry** questions/answers
- CTC is recognized at the national level as an example of an effective non-profit
- CTC **and its** programs are highly visible and respected throughout the state

Evaluation – How effective is CTC's marketing strategy and how can it improve?

There was general agreement among the board members present that CTC's effort to reach a broad audience in Colorado could be improved. In many ways, this work is the piece of CTC's efforts that people like the least. It happens last and many times not at all. This is common with many nonprofit organizations. The concept of "selling" or "marketing" can have negative connotations for people involved in what they consider an obvious right approach to something. However, communicating ideas is critical to organizational success – not only for raising awareness but raising funds as well.

The key realization of this discussion is that whatever one calls it – marketing, communications, outreach, etc. – everything an organization does (or doesn't do) communicates a message to members, non-members, funders, potential funders, and policy makers. A well crafted marketing strategy can help recruit board members, members, communities, and corporations to become partners with CTC to help achieve its mission. To these ends, the board members agreed to the following:

Goals of marketing strategy

- Building Awareness
- Sharing what we do
- Explaining why you should care

| | | |
|---|--|--|
| 6. Create budget for consulting work. <ul style="list-style-type: none"> Note that the process of understanding CTC's marketing needs could put the organization in contact with individuals and organizations that could help CTC on a pro bono basis. (see Board Development) Write a grant to fund the marketing consultant | All board Vince w/ Karen | October 06 January 07 |
| 7. Advertise for marketing support as necessary. | Subcommittee | March 07 |
| 8. Work with consultant (team) | Subcommittee | May 07 |
| 9. Draft marketing plan <ul style="list-style-type: none"> Present to board for adoption | Subcommittee and full board | October 07 |
| 10. Begin implementing marketing plan | Full board | October 07 |
| 11. Create a funding data base to track potential sponsors and to determine who is approaching them and for what program. | | Ongoing |

Marketing Resources

- **Groundspring** – Affordable internet fundraising, email, and advocacy and for nonprofits www.groundspring.org
- **Online Fundraising Handbook** - www.groundspring.org/learningcenter/handbook.cfm
- **A Goodman – Good Ideas for Good Causes** <http://www.agoodmanonline.com/green.html>
- **Storytelling as Best Practice.** By Andy Goodman, 2003 www.agoodmanonline.com/publications/storytelling/index.html
- **The Story Factor: Inspiration, Influence, and Persuasion Through the Art of Storytelling.** By Annette Simmons, 2002.
- **Strategic Stories: How 3M is Rewriting Business Planning.** by Gordon Shaw, 1998. Harvard Business Review.
- **Communications Toolkit: A guide to navigating communications for the nonprofit world.** by R. Christine Hershey, 2005 Cause Communications, www.causecommunications.org
- **Smart CHART: Helping Nonprofits Make Smart Communications Choices** - www.smartchart.org/
- **The Frameworks Institute** – www.frameworksinstitute.org

IV. PROGRAM DEVELOPMENT

CTC has a number of programs that would benefit from the efforts of the Marketing / TPG subcommittee. Generally, the board wanted to improve the visibility of existing programs rather than create new ones, however, the board recognized a number of opportunities that that CTC could pursue over the next five years. The timeframe for work in this area shows, much of the program development is on the back burner until the CTC board completes work in board development, funding and membership, and marketing.

Goals

- Remarket current programs based on new communications strategy
- Expand **successful programs** and create new programs as possible funding allows

| Grants | Education/Outreach | Policy |
|--|---|--|
| <ul style="list-style-type: none"> ▪ We give away over \$100,000 annually ▪ We give away sooo much money in grants ▪ \$1,000,000 grant money for communities annually ▪ Bring in a lot of grant \$ ▪ A CTC funded project in every town in Colorado ▪ Grants for tree planting ▪ Corporate giving to enhance the urban forest | <ul style="list-style-type: none"> ▪ People working to preserve natural areas ▪ Educated the general public on trees ▪ People educated about the values of natural areas ▪ Planted the right tree in the right place ▪ Fully stocked and diverse community forest ▪ Tree care workshops in communities ▪ Poster contest is active in every school ▪ Annual educational workshop ▪ Sponsored by CTC ▪ Programs targeted to both rural and urban areas ▪ Community awareness of healthy forests ▪ Kids playing in yards and parks ▪ CTC hosts various types of workshops throughout the state ▪ “Tree Tour” Map for most cities ▪ Bring together management and research ▪ Regional Arboretums sponsored by CTC ▪ Mini-Arboretums in parks ▪ Every community has a volunteer tree planting program (“Trees Across Your Community”) ▪ Every community has an Arbor Day planting ▪ Knowledgeable Tree “Owners” (citizens and politicians) ▪ Tree diversity (10%) ▪ Diversity in every | <ul style="list-style-type: none"> ▪ Best Practices for local governments <ul style="list-style-type: none"> ○ Tax break for planting trees and caring for trees ○ Street trees in all developments ○ Every school in the state with a canopy of state trees ○ Trees are infrastructure not amenities ○ ½ of urban area (or parking lots) under the cover ○ As in the time of those that came before us – every street in every community has trees and they are healthy. ○ HOA’s taking responsibility for street trees ○ Every community adequately budgets for tree maintenance and planting. ○ Hazard tree management in large and small communities ○ No tree topping ○ Fully stocked streets with trees |

| | | |
|--|---|--|
| | <p>community forest</p> <ul style="list-style-type: none">▪ Forester/arborist and necessary staff in all communities▪ Colorado has national champion Blue Spruce | |
|--|---|--|

Evaluation – What are CTC’s programmatic opportunities?

Given CTC’s mission, there are a number of programs that CTC could implement. Fully evaluating the timeliness and effectiveness of program options beyond current efforts is on a longer timeframe than the strategic plan elements documented above. However, collaborating with Tress Across Colorado presents a unique opportunity that a program subcommittee will explore now rather than wait until work in plan elements 1-3 is complete. Consequently, the board agreed to the following:

Next Steps:

Create a Program subcommittee:

- Gertie
- Phil
- Tom (**chair**)

| Tasks | Who | Timeframe |
|--|---|---------------------------------------|
| 1. Examine CTC and Trees Across Colorado collaboration (TAC) <ul style="list-style-type: none"> a. This is a great opportunity that should be further explored b. Evaluate what it would take to expand TAC and connect it more with CTC | Subcommittee | May- July 05 (done) |
| 2. Present draft proposal of TAC to full board <ul style="list-style-type: none"> ▪ Implementation of collaboration might be possible until 07. ▪ Elaborate on and add explanation to the proposal drafted by Gertie Grant | Subcommittee Include communities currently involved | July 05 –Jan 07 July 06 |
| 3. Develop standard operating procedures for all successful programs and mentor your replacement. | Program coordinators | December 06 |

Program Resources

Collaborative Leadership: How Citizens and Civic Leaders can make a difference.
By David Chrislip and Carl Larson, 1994.

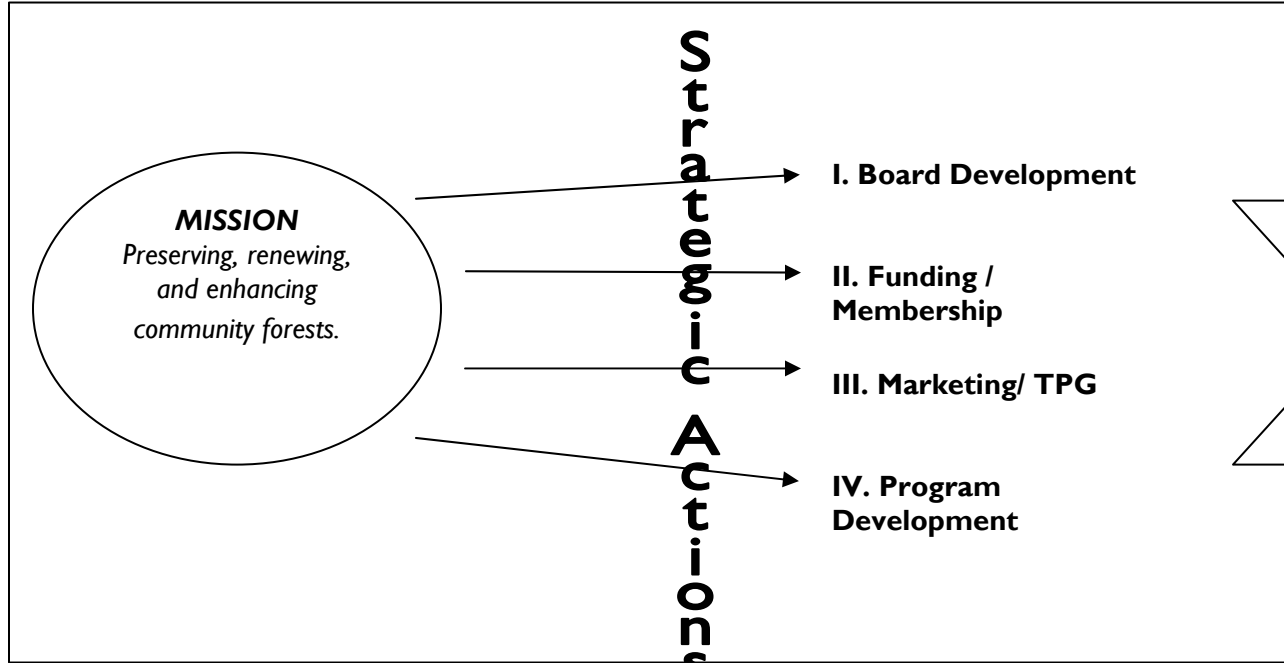
Collaborative Leadership Fieldbook.
By David Chrislip, 2002.

High Performance Nonprofit Organizations: Managing Upstream for Greater Impact.
By Christine Letts, 1999.

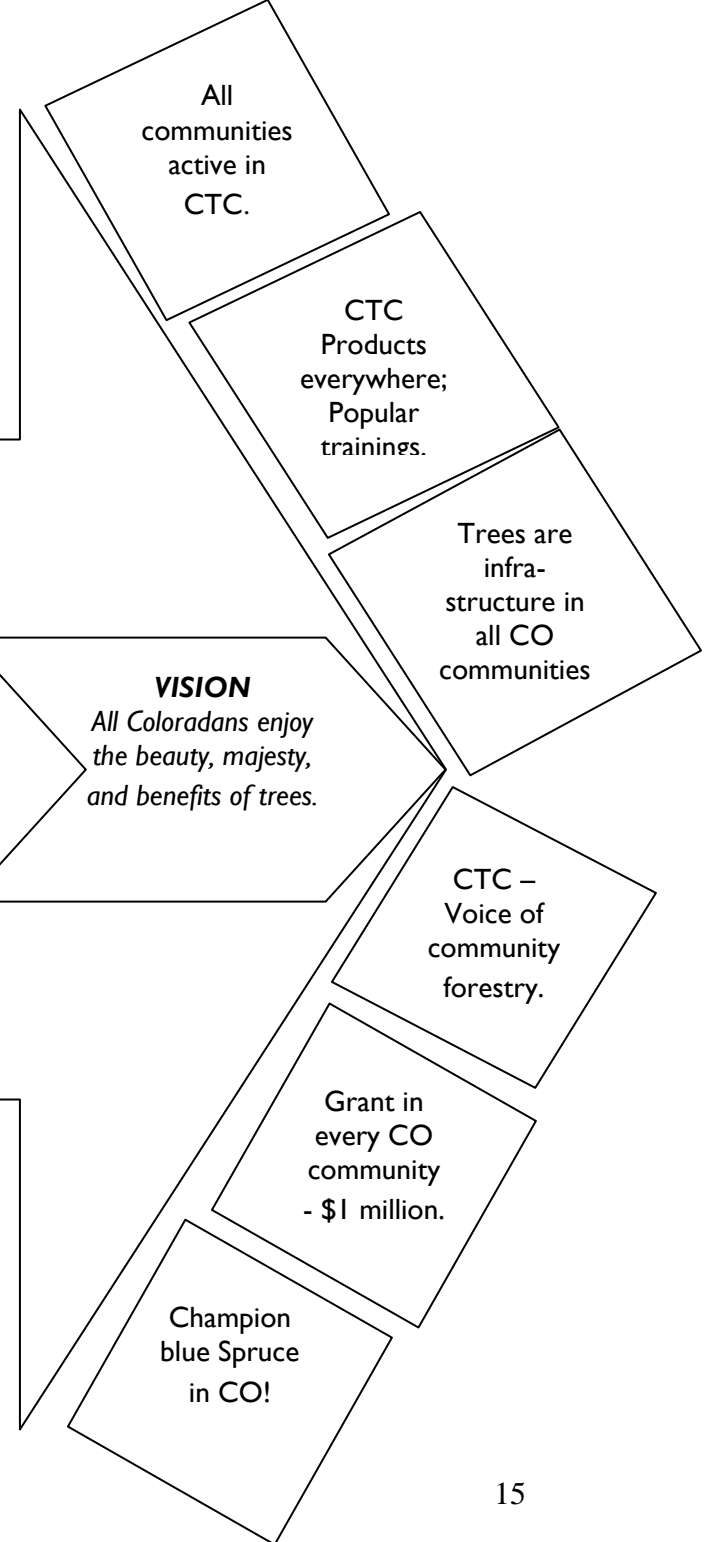
The Fifth Discipline Fieldbook: Strategies and Tools for Building a Learning Organization.
By Peter Senge, 1994.

CTC Strategic Plan Summary 2005-2009

Existing Programs



Existing Funding



| PLAN ELEMENT | 2006 | 2007 | 2008 | 2009 | 2010 |
|---|--------------|--------------|--------------|-------------------|--|
| III. Marketing / TPG | | | | | |
| 1. Choose a subcommittee name | DONE | | | | |
| 2. Evaluate the previous marketing report written by Creative, Inc. | 7/06 | | | | |
| 3. Work with each existing committees to identify their marketing/funding needs. Conduct a community needs assessment/survey. | 8/06 | | | | |
| 4. Contact other like-minded organizations about their marketing strategy. | 9/06 | | | | |
| 5. Create a marketing scope of work/ job description so CTC knows what it wants from a consultant. | 10/06 | | | | |
| 6. Create budget for consulting work. Write a grant to fund marketing. | | 10/06 | 1/07 | | |
| 7. Advertise for marketing support as necessary. | | | 3/07 | | |
| 8. Work with consultant (team) | | | 5/07 | | |
| 9. Draft marketing plan | | | 10/07 | | |
| 10. Begin implementing marketing plan. Create a funding database to track potential sponsors. | | | 10/07 | 10/07-7/09 | <div style="border: 1px solid black; padding: 5px; display: inline-block;">Ongoing</div> |

| PLAN ELEMENT | 2006 | 2007 | 2008 | 2009 | 2010 |
|---|-------------|------|------|--|------|
| IV. Program Development | | | | | |
| 1. Examine CTC and Trees Across Colorado collaboration (TAC) Present draft proposal to full board | DONE | | | | |
| 2. Implementation of collaboration might be possible until 07. Add information to Gertie's proposal . | 7/06- | 1/07 | | <div style="border: 1px solid black; padding: 5px; display: inline-block;">Ongoing</div> | |
| 3. Develop standard operating procedures for all successful programs and mentor your replacement. | 12/06 | | | | |

CTC PROGRAM DEVELOPMENT (March 7, 2006)

Community Education Program

- Hazard Tree Program: Bill Cassel, Ralph Zentz, Ken Wicklund, Jude O'Connor, Becky Wegner, Mike Schomaker
- Select Tree Evaluation Program: Tim Buchanan,
- NADF Poster Program: Donna Davis, Doug Schoch
- Workshops (ECCFC, WCCFC, ISA-RMC): Vince Urbina, Keith Wood, Scott Grimes

Grants Program

- David Flaig, Keith Wood, Grant reviewers

Champion Tree Program

- Neil Bamesberger, Vince Urbina, Doug Schoch

Notable Tree Program

- Calendar: Becky Wegner, Kathleen Alexander, Jennifer Sherry, Keith Wood, Phil Hoefler, Vince Urbina, Neil B.
- Tree Tours: To Be Determined, Dave Hoefler

Awards Program

- Wendy Ball, Phil Hoefler, Joann Phillips, Ralph Zentz

Newsletter Program

- Keith Wood

Website Program

- Brian Green

Deb Ashe Cottonwood Classic Program

- Keith Wood, Scott Grimes, ISA-RMC Executive Secretary

Trees Across Colorado Program

- Gertie Grant, Tom Wells, Dave Flaig, Wendy Ball

Community Forestry Disaster Fund Program

- Ralph Campbell