



**Virginia Forestry Association
Strategic Plan
2016 - 2021**

*Executive Summary
April 19, 2016*

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Overview and Approach

According to the dictionary, *stewardship* is defined as “the careful and responsible management of something entrusted to one's care,” a concept that VFA members know and live better than most. Just as responsible landowners keep their forest management plans up to date, VFA has developed this strategic plan to guide the association’s activities for the next five years. The resulting plan is intended to focus the association’s existing resources and valuable time on what is needed most for the long-term success of the association.

To accomplish this, VFA’s Executive Committee commissioned a Strategic Planning Team (SPT) in late 2014 to develop a plan for the Board’s consideration. While clarifying its purpose, scope and methodology in December 2014, the team also began developing a central theme for the next five years. With feedback from members, this evolved into the plan’s 5-year focus of achieving a more *unified voice of forestry in Virginia*.

As with all good forest management plans, the process began with an assessment of the current on-the-ground situation. To do that, the SPT began collecting data in the form of member surveys at the 2015 Forestry Summit and continued connecting with members and other stakeholders for much of the year. These activities included a face-to-face forum with current forestry students at Virginia Tech, a survey of young forestry professionals, an all-member survey, and subcommittee discussions with some deeper research on the organization’s strengths, weaknesses, opportunities and challenges.

Based on these findings and the team’s awareness of the many forces affecting forests, trees, people and forestry in the Commonwealth, the SPT proposed several major initiatives to the Board in April 2016 with an important feature. Specifically, the following data summary and plan includes an ambitious network of initiatives that affect internal operations, member engagement, and external audiences. So, to ensure continuity and long-term success, the SPT also recommended the creation of an oversight committee to help coordinate the work streams, keep the plan on track, and adapt when necessary.

In conveying its recommendations to the Board, the SPT also gave this caveat. The plan’s ultimate success will be interdependent on four main factors: membership retention and growth, financial capacity, staff capacity, and member involvement. If those areas flatten or falter, then the significant initiatives herein will be most difficult to achieve.

However, the SPT is optimistic that just as a fire builds heat, momentum and distance as it draws in fuel and oxygen, so will the execution of this strategic plan as it brings in additional member involvement, energy, and commitment to the long term stewardship of our association and its mission.

Data Collection and Major Findings

The SPT collected data from the following sources: participants at the 2015 Forestry Summit, forestry students at Virginia Tech, young forestry professionals, individual calls to key stakeholders who were not at the Summit, and an all-member survey. In addition, the SPT broke into three sub teams to do some deeper research and assessment of the organization's strengths, weaknesses, opportunities and challenges. This is an executive summary of the SPT's findings.

2015 Forestry Summit Survey

Participants in the 2015 Forestry Summit Survey provided overwhelmingly **positive support for the plan objective**, *a unified voice of forestry in Virginia*. Survey participants also provided **encouragement for the SPT** to be bold, transparent, think long-term, take their time, and *do it right*. In addition, they warned that **a unified voice would be difficult** because of the diverse perspectives and agendas of the forestry community. Finally, there were a few concerns and footnotes about the fact that **greater collaboration and leadership would be necessary** to achieve the objective.

Survey participants also offered **initial ideas** for how VFA might accomplish a more unified voice, and they encouraged the continuation of the Forestry Summit and other events like it. **Participants suggested** additional joint activities; communications; attending one another's meetings and events; inclusive committees; advertising; mini-conferences; recognizing length of service; greater involvement, access and support for loggers; and finding ways to include young people more fully.

Virginia Tech Student Forum

A student interaction event was organized for Virginia Tech students in October 2015 in order to learn how best to interact with emerging natural resource professionals and students and to request their input on the strategic planning process. The event involved 30 students, mostly seniors with a mix of natural resource majors. Five committee members and several faculty members interacted with students to learn their perspectives and share information about VFA. Key observations included the following:

- While the students were very bright, engaged and interested in VFA, **very few had heard of the association or its mission**, and they had little awareness of the interrelationships throughout the forestry community.
- Students were **interested in staying connected**, and about 30 took advantage of complimentary one-year VFA memberships. Ideas for staying connected included mentoring, attendance at the Summit, student panels, and meeting forestry leaders when they come to Tech.
- Participants were interested in **networking and meeting leaders**, "people of influence," and other professionals in the forestry community for learning and job opportunities.

Young Forestry Professionals Survey

The SPT also reached out to more than 30 young professionals in their first 5-10 years of their careers and asked for their insights on several matters. Key observations included the following:

- Respondents had a **consistently favorable impression** of VFA and good awareness of its existence and purpose.
- **Reasons for joining** included supporting VFA, staying connected professionally, staying informed, and enrolling because their employer suggested it.
- Most found that **expected value was being received** in the form of professional networking but that this was limited to the *Forestry Summit*; **other value included** staying in touch with issues, learning from more experienced professionals, and listing membership on their resumes. They said that **additional value might be gained** with smaller or shorter educational opportunities that would better allow for time away from work, meaningful fellowship/networking opportunities for young professionals, and making their involvement easier for those not on the Board or serving on formal committees.
- While perceived value was not a major obstacle, **dues remained a hurdle for some**, unless they were paid for by their employers, which did not appear to be the norm.
- Similar to the students, participants **preferred email communication** for business purposes and **Facebook Groups** for connection and fellowship opportunities.
- **Suggestions for improving the *unified voice*** concept included holding more focus groups to understand perspectives, maintaining the positive impression of forestry and foresters among the public, appealing to younger members and professionals, educating the next generation of landowners, engaging more parts of the forestry community, and promoting forestry as a land investment.

SPT Sub Team Sessions

Three SPT sub teams were created and commissioned to do a modified SWOT analysis (strengths, weaknesses, opportunities and threats) on assigned areas. They met either in person or virtually as breakout groups in the fall of 2015. These are the highlights of their findings.

- **The *Internal Factors Sub Team*** was asked to look at the strengths and weaknesses of the association's infrastructure to see what might need to be addressed in order to achieve a more *unified voice*. They determined that the Board needed to be restructured, made smaller, more accessible and efficient with clearer roles and responsibilities and representation of members; that recruitment needed to increase for younger generations and education continue for school-age children; that the association's management software needed updating; that the number of staff is small

relative to the need; and that communication with members and partners must continuously be improved with evolving tools and technology.

- **The *Internal Constituencies Sub Team*** was asked to assess the relative strengths and weaknesses of VFA's relationship with internal constituencies (i.e., those already active in the forest management community) and how those relationships might help or hinder VFA to *lead the unified voice of forestry in Virginia*. They determined that while landowners were the largest group of members (40%), this still represented less than one percent of forest landowners in Virginia. This is both our largest constituency and our largest opportunity for growth and impact, because we still lack engagement with a large sector of landowners. Also, while VDOF is highly engaged and mutually supportive with VFA, the USFS is not. The sub team also noted that forest families have one chance in a generation to get their succession plans right, which is significant for the future. It was also observed that Virginia Tech Cooperative Extension is one of the best ways to stay in touch with landowners, that forestry faculty are rarely VFA members, that membership dues (and reciprocal agreements) should be explored further, that the Virginia Forestry Education Fund is a significant asset, and that VFA member presence at landowner events is essential but sparse.
- **The *External Constituencies Sub Team*** was tasked with studying the opportunities and challenges posed by VFA's major external constituencies in regard to helping or hindering VFA to achieve a unified voice of forestry in Virginia. The key observations included the following: pro-forestry legislators continue to pose a great opportunity if we can continue to inform them about our impacts and needs; non-forestry legislators and urban voters pose a considerable challenge to our mission unless they can be reached and engaged more effectively; unengaged forest landowners are a major opportunity to inform about threats to their forest interests and inform their decisions with the help of VDOF and Virginia Tech's extension service; we need to build more consistent working relationships and forums with affiliated regulatory agencies; a number of primary *environmental* organizations are currently outside VFA span of influence but offer a great opportunity where common ground exists; Real Estate agents can provide a significant bridge to forest landowners and one that the extension service has bolstered but needs support; local governments are engaging in a variety of regulatory issues that affect forest landowners; loggers are an important lynchpin with landowners such that their practices directly influence the perception of our entire community; and productive relationships remain critical with other forestry based associations.

2015 Member Survey

An all-member survey was conducted in the fall of 2015 using both mailed surveys and email survey formats, which received about a nine percent response rate.

- **Regarding what VFA does particularly well**, the following topped the list of responses: **policy and legislative** representation at the state level; **member information**, education and programs (e.g., Tree Farm, PLT, VFEF, scholarships); **meetings such as the Forestry Summits**, but also forums for relationships, connections and learning; and **communication tools** like *Virginia Forests* magazine, email alerts and newsletters.
- **Regarding what VFA could do even better**, survey participants reported the following major observations: the need to **increase breadth of membership** to include and serve a wider population of stakeholders so that the association is less dependent on the traditional large forestry interests (i.e., be more inclusive of young people, heirs, urbanites, small-acreage owners, western regions, the underserved, loggers, Timber Investment Management Organizations (TIMOs), arbor businesses, people with interests in the forest other than fiber); **increase services** and involvement, **representation** at the landowner level (“rank and file”) rather than depending on the leaders of large forestry interest groups too heavily (e.g., more inclusion, easier **access** to the Board, committees, opportunities for feedback, and connections to resources); and increased attention and responsiveness to **localized issues** (regional meetings, local networks, local response teams).
- **Regarding how members prefer to receive information**, participants reported the following: a preference for greater frequency of updates; **minimal interest in social or video media** by most current members but recognition for a **need to modernize** in this area to reach new constituencies with more contemporary methods.
- **Regarding what VFA could do better when working with other forestry interest groups**, participants mentioned the following: respecting the different roles of groups but finding common ground more than getting stuck on areas of difference; becoming more proactive in breaking down barriers and cross-pollinating with interest groups; combining newsletters; developing forums for diverse views to be shared; holding joint Board meetings; and offering quarterly and/or more local meetings.
- **Regarding what else VFA should be concerned about for the future**, respondents mentioned the following themes: **increasing government regulation** and intervention from the federal to the county level; **declining human resources** needed to fuel our community (e.g., traditional forestry students, logging community, young members); **multiple environmental, economic and silvicultural trends** but none with much greater frequency than others (e.g., forestry in wetland mitigation, hardwood management and markets, land conservation, growth-drain, deer-hunting, trespass, keeping the family farm in the family, micro/urban forestry).

- **Regarding what other advice, information or questions**, participants noted the following: many general kudos to the staff; the need to add staff to accomplish goals; the need to improve Board-level access, representation and operations; the need for a stronger presence in the media.

The tables on the next several pages represent the strategic plan itself, which is broken down into the five primary focus areas and includes guidance for leadership, contributors, timing, and benefits.

Strategic Plan - Focus Area #1: Organization Development – Facilitate strategic plan implementation and restructuring the Board to improve unified and effective decision-making and execution; ensure inclusive representation; enable easier access and connection; and encourage more local as well as statewide member involvement while maintaining needed staff capacity.

Action Items	Owner/Lead Person	Contributors	Milestones & Due Dates	Benefits Achieved
a. Appoint an oversight committee	Carolyn	3-4 people, past presidents and at least one coordinator (staff and/or otherwise)	Gets started with the incoming Board, establish after the 2016 Summit	To ensure execution of the plan by coordinating the many work streams, checking and reporting progress to plan, and maintaining momentum. So that the leadership structure is most efficient, responsive and agile as the organization faces increasing complexity in the environment and society.
b. Recruit a restructuring subcommittee	Paul and Carolyn	Subcommittee of 2-5, including at least two past presidents, executive director, and two other experienced leaders	Gets started with the incoming Board, establish after the 2016 Summit; the committee also recommends that any restructuring not affect Board members during their tenure but be a gradual transition	
c. Evaluate pros and cons of many options, getting initial input; consider initial ideas in May 2015	Subcommittee	Executive Committee, Executive Director	Initial ideas to Executive Committee for Spring retreat (mid-May 2016)	
d. Propose two or three alternative structures that consider geographies, local regions, ownership size, age, interests, access, clear expectations, councils or committees.	Subcommittee	Executive Committee, Executive Director	Complete implementation planning by end of Q1 2017	
e. Develop an implementation plan for the chosen structure			Complete transition by end of Q1 2018	
f. Implement transition plan				
g. Evaluate staffing, recommend enhancements	Executive Director		At the end of each calendar year	So that staffing levels consistently match organizational needs and strategies by balancing size, functions, and personnel development.
h. Reevaluate board structure	Next Strategic Planning Team		At the end of five-year planning cycle	So that the new structure is reviewed and improved after a reasonable period of time in place but not so frequently that it causes undue disruption.
i. Review building and infrastructure needs	Executive Committee	Executive Director, Board	Beginning in 2019 or sooner if needed	So that the building and infrastructure remains adequate for the strategy

Strategic Plan - Focus Area #2: Communication and Marketing – Ensure VFA is actively engaged with the entire natural resources community and recognized for its leadership and expertise; the general public has increased awareness and support of our Mission and that internal stakeholders are exceptionally well-informed and involved.

Action Items	Owner/Lead Person	Contributors	Milestones & Due Dates	Benefits Achieved
a. Revisit and potentially revise the mission statement and reconcile with advocacy statement	SPT will fine-tune, reconcile and shorten to a tagline	Executive Director and Staff	Before the 2016 Forestry Summit	So that the purpose of VFA remains current, relevant to the environment in which we operate, and easily communicated.
b. Develop/identify VFA brand and logo	Professional communication staff from across the community (or contractors)		Q3 2016	So that the look and feel of the organization's visual branding conveys the essence of the mission, both informatively and impactfully.
c. Develop a communication plan with PAC			Evaluate the current situation by Q3 2016 Develop improvements by Q4 2016	So that the communication system is up-to-date and effectively used to reach key audiences with key messages through the most appropriate and cost-effective channels for each constituency.
d. Review and articulate the value proposition of the organization and its communication	Executive Committee		Articulate the value proposition by Q4 2016	So that members are getting and perceiving the value they need and want.
e. Communicate the roles of leaders, their connection to members, and their accessibility			Attach this deadline to the outcomes of Focus Area #1 (Organization Development)	So that members are keenly aware of who represents and serves their interests in the leadership structure.
f. Implement the communication plan with PAC	Executive Committee and designees		Beginning as soon as the plan is complete and approved	So that the brand, value proposition and tools are effectively implemented.

Strategic Plan - Focus Area #3: Membership Diversification – Maintain and grow the depth, breadth and diversity of our membership by improving our value proposition for them and finding creative ways to connect more fully with current and potential members.

Action Items	Owner/Lead Person	Contributors	Milestones & Due Dates	Benefits Achieved
a. Update social media mechanisms to communication tools for outreach to younger populations	Shannon and agency professionals	VFA staff; link with communication professionals in Focus Area #2 (Communication and Marketing)	Immediate start and on-going	So that the association is less dependent on traditional members and more proactively inclusive of <i>additional current</i> members and <i>potential new</i> members to ensure our voice is unified across the widest possible spectrum of Virginians.
b. Evaluate membership categories in light of Strategic Planning Team feedback	Staff and membership task force		Prior to April 2016	
c. Establish student engagement plan, including annual visit to Virginia Tech and additional outreach to other schools	Staff and membership task force	Some specific individuals have been identified but not yet contacted	End of June 2016	
d. Implement student engagement plan			Beginning as soon as plan is complete	
e. Establish membership diversification plan by identifying categories of potential new members (e.g., affiliations, gender, ethnicity, urban, rural, geography, families) and developing outreach initiatives	Membership task force	Some specific individuals have been identified but not yet contacted	Before end of 2016	
f. Implement member diversification plan			Beginning as soon as plan is complete	
g. Establish a <i>meet and greet</i> component at Forestry Summits	Summit Planning Team and Staff		2016 Summit and on-going	

Strategic Plan - Focus Area #4: Revenue Enhancement – Find or create additional sources of revenue to help fund expanded operations, communications, advocacy and outreach initiatives necessary above and beyond the current level, which is made possible by dues alone.

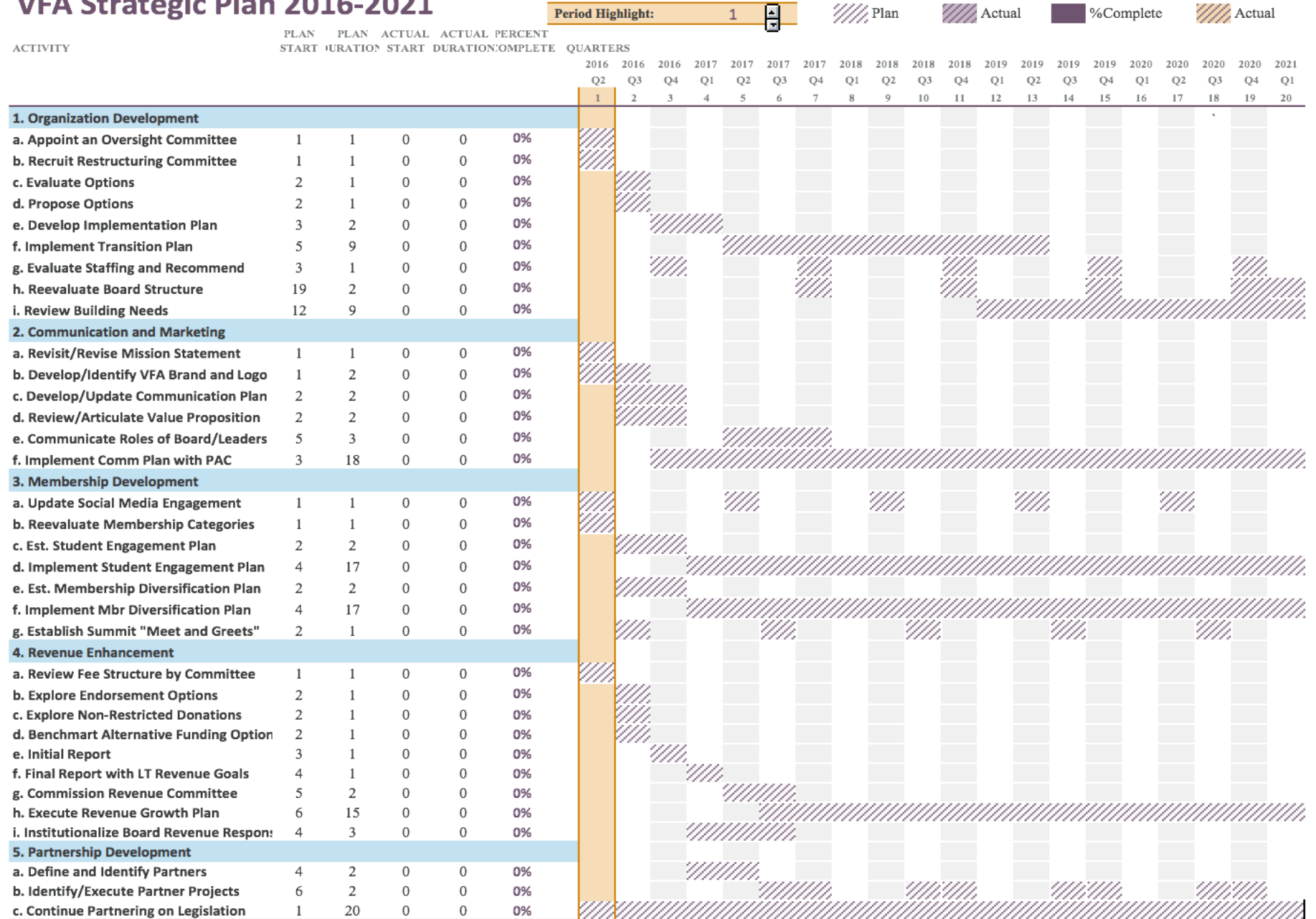
Action Items	Owner and/or Lead Person	Other Contributors	Milestones & Due Dates	Benefit to be Achieved
a. Review and recommend adaptations to membership fee structure	A temporary task force to be appointed by the Executive Committee, including at least the following: current treasurer, past treasurer, VFA staff representative, professional fundraiser, SPT representative	Some specific individuals have been identified but not yet contacted; Other outside expertise as deemed necessary	Q2 2016 - Establish the temporary task force	So that the organization is less dependent on membership dues as the primary source of funding its growing operations.
b. Explore endorsements to enhance revenue			Q3 2016	
c. Explore non-restricted donations and grants [i.e., 501(c)3 at least]				
d. Benchmark other alternative funding sources of similar organizations and associations (i.e., bequests)				
e. Initial report			Q4 2016	
f. Final report with LT revenue goals			Q1 2017	
g. Commission revenue implementation committee	Executive Committee		Q2-Q3 2017	
h. Executive revenue growth plan	Implementation Committee		Beginning Q3 2017	
i. Institutionalize Board revenue generation responsibility	Executive committee		Beginning Q1 2017	
<p>Also, take the following longer-term ideas into consideration:</p> <ul style="list-style-type: none"> • Advocacy and tax deductibility of revenue • Discounts for members • Selling products and fees for services • Obtaining grants to support partnership projects/issues (some for overhead) • Creative joint memberships 				

Strategic Plan - Focus Area #5: Partnership Development – Seek out and establish unifying partnerships to address relevant statewide issues or initiate significant projects with allied associations and interest groups who have a similar mission, even when there is not full agreement across natural resources concerns.

Active Action Item	Owner/Lead Person	Contributors	Milestones & Due Dates	Benefits Achieved
a. Define and identify types of “partners,” identify current key partners, identify potential partners by issue and common mission	Executive committee	Subcommittee and/or or assignees Some specific individuals have been identified but not yet contacted	Q1-Q2 2017 Establish goals and roadmap	So that new and expanded partnerships are grown by working on concrete issues that are common to allied entities
b. Approach partners to identify issues or projects of highest interest and impact			Identify annual forums or projects beginning Q3-Q4 2017	
c. Continue identifying important political issues across the state, develop partnership plans for each			Initiate at least one concrete partner project annually unless one more emerge on their own Report progress every quarter	

Gantt Chart - Timeline

VFA Strategic Plan 2016-2021



Strategic Planning Team Members

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John Carroll, Carroll Resource Management

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