



EcoForesters

Forestry. Conservation. Education.

Strategic Plan

July 2020-June 2023

Our Mission:

EcoForesters is a non-profit professional forestry organization dedicated to conserving and restoring our Appalachian forests through education and stewardship.

Our Vision:

Appalachian forests are part of a vibrant, healthy, and diverse landscape through ecological stewardship benefitting current and future generations.

Our Values:

- **Community** – we recognize our forests are natural, renewable resources whose sound management benefits all in the community.
- **Service** – our team goes above and beyond to meet our clients' and stakeholders' needs and deliver high quality services and programs.
- **Integrity** – our staff is dedicated to being honest, sincere, impartial and respectful in our actions.
- **Collaboration** – we work with organizations and individuals to create new, shared opportunities that benefit our forests.
- **Professional Expertise** – our services and programs are based on the most current forest science and practices, utilizing efficient and innovative methods, and administered by well-trained, experienced and professional individuals.

What Makes Us Different:

EcoForesters straddles the world between forest conservation and active management by connecting healthy forests to landowner values.

Strategic Focus Areas – July 2020 - June 2023:

1. Organizational Growth and Stability
 - Financial Sustainability
 - Fundraising
 - Administrative Efficiency and Structure
 - Organizational Culture
2. Building More Robust Programs
 - Outreach and Education
 - Forest Restoration and Invasive Species Control Services
 - Forestry Consulting Services
 - Landscape Scale Forest Conservation and Stewardship Projects

Goals and Objectives – July 2020-June 2023:

1. Organizational Growth and Stability: *Financial Sustainability*

Key Indicators of Success:

- Systems in place to monitor costs, overhead, and pricing by employee and project.
- Reduction in overhead costs.
- Efficient and accurate accounting of employee expenses/time per project, overhead calculation, profit margin per project, and monthly profit margin.
- New policies/procedures in place for use of restricted funds to ensure security of funds.
- Stable profit margins on contract work with consistent pricing that covers direct costs and overhead.
- Steady business for forestry and invasives programs.
- Steady increases in fundraising.

Goal 1: Balanced budget by end 2020, and surplus in 2021

Objective 1: Systems in place asap for ongoing accurate review of programs profit/loss including time tracking and percentages by project and employee by end of 2020.

Objective 2: Systems in place asap for ongoing accurate review of programs overhead, including marketing costs, and how much to allocate to programs (forestry, invasives, outreach) by end of 2020.

Objective 3: Systems in place for appropriate billing, possibly going to all hourly billing for consistency, to maintain consistent profit margins above direct costs and overhead for each project by end of 2020.

Objective 4: Increase fundraising of unrestricted funds from \$40,000 in 2019 to \$80,000 in 2020 so that non-profit overhead and programs pay for themselves.

Objective 5: Reduce overhead by \$40,000/year (20%) so that all fee for service programs have overhead no more than 80%.

Goal 2: Six months operating costs as reserve (\$120,000) by the end of 2023 (not including restricted funds or loans).

Objective 1: Achieve a \$20,000 surplus in fee for service work in 2021 by maintaining consistent profit margins (via methods listed under goal 1) along with a target of \$200,000 gross contract work. (For example if we maintain a 10% profit margin on \$200,000 gross income we should achieve a \$20,000 end of year profit.) Maintain these margins in 2022 and 2023 so profits total \$60,000 by end of 2023.

Objective 2: After reaching \$80,000 in unrestricted donations in 2020, increase unrestricted fundraising by 20% each year thereafter, thereby reaching \$58,240 surplus (above \$80,000 non-profit basic programs and admin expenses) by end 2023.

Goal 3: Review and improve employee work plan system to be in place by 2021 with quarterly checkups and annual reviews that allocate time appropriately to meet company financial goals.

Objective 1: Build off of current system maintaining simplicity, ease of use and understandability for both supervisor and supervisee.

Objective 2: Ensure system has specific measurable goals that are tied to overall company goals for contract work and non-profit programs.

Goal 4: Improve accounting accuracy and security of funds.

Objective 1: By September 2020, maintain an interest earning account where restricted funds from donors, restricted grants, loans, and down payments from clients greater than \$5,000. Restrict access to this account to require dual authority from Board President and Treasurer.

Objective 2: By September 2020, account for restricted funds from donors, restricted grants, loans, and down payments from clients greater than \$5,000 as a liability until funds are used for their specified purpose. (Note: this is not possible in quickbooks but EF will keep a separate spreadsheet to track these funds.)

Objective 3: By September 2020, bill all clients, and transfer restricted funds/grants/down payments as appropriate, on a monthly basis so that monthly income for work performed is accurate.

1b. Organizational Growth and Stability: *Fundraising*

Key Indicators of Success:

- Donor retention is stable and approximately 66%
- Increased donor acquisition by 25% each year
- Fundraising income rises and meets program funding levels
- Core donors are developed and nurtured
- Grow collaboration with EBCI
- Staff and board fully engaged in development

Goal 1: Fundraising supports non-profit programs expenses sufficiently by 2020.

Objective 1: Differentiate between non-profit outreach costs and fee for service marketing.

Objective 2: Meet quarterly objectives found in annual fundraising plan.

Objective 3: Integrate recommendations from Review of Current Practices and discuss with Development (GEM) Committee and Board by end of calendar year 2020.

Objective 4: Support fundraising with investment of staff and board time.

Goal 2: Donor retention of 66% each year.

Objective 1: Improve donor engagement by contacting all donors personally by phone at least twice a year.

Objective 2: Programmatic updates to donors quarterly via email.

Objective 3: 4 core donors (with high giving capacity) are developed annually.

Objective 4: Work plans goals for donor cultivation are met or exceeded.

Objective 5: Make thank you calls to all donors and involve the board in thanking donors.

Objective 6: Solicit support from existing donors through year end mailing annually. Segment the year-end mailing with different letters based on relationships with EF.

Objective 7: Consider an additional mailing in either March or September.

Goal 3: Increase the number of new donors by 25% each year.

<i>Objective 1:</i> Participate in Go Local yearly with a goal of at least \$1,000 and to provide an entry point for new donors.
<i>Objective 2:</i> Utilize Facebook to promote small peer-to-peer fundraising campaigns to convert followers to donors and access their networks.
<i>Objective 3:</i> Consider online event that can be publicized on social media to reach existing and potential donors.
<i>Objective 4:</i> Solicit support from new donors through year end mailing annually. Segment the year-end mailing with different letters based on relationships with EF.
<i>Objective 5:</i> Consider an additional mailing in either March or September.
Goal 4: Apply for and secure at least two grants per year.
<i>Objective 1:</i> Grant calendar completed and updated each year.
<i>Objective 2:</i> Develop relationships with grantmaking organizations.
<i>Objective 3:</i> Develop plan to co-write grant with Eastern Band Cherokee Indians
Goal 5: Fully engage board and staff in development
<i>Objective 1:</i> 100% board member gifts received by end of 2020.
<i>Objective 2:</i> Staff participation in developing new and existing donors

2. Organizational Growth and Stability: <i>Administrative Efficiency/Structure</i>
<p>Key Indicators of Success:</p> <ul style="list-style-type: none"> ● Succession plans are in place for leadership staff and board. ● Management and employee roles are well understood, stable, and clearly defined. ● Staff time on administrative tasks is significantly reduced and/or delegated to support staff, contractor, or volunteer. ● Clear well-defined systems are in place for administrative tasks. Administrative tasks are well defined for each employee. ● Policies are complete, up to date, and effective
Goal 1: Redefining roles and responsibilities of leadership staff and board

Objective 1: Transition plan in place to hire new ED, likely internal replacement, and for Rob to step down from ED role and to serve only as board president by end 2021 or earlier if possible.

Objective 2: Define and separate roles - board chair and ED - as part of the plan to separate, determine the ideal staffing structure within our budget by end 2021.

Objective 3: Develop plans for succession for all leadership staff and board leadership by end 2021.

Objective 4: Create job descriptions and supervisory authority to streamline systems and delegate authority and responsibilities for leadership staff by end 2020.

Objective 5: Consider support and/or training from Pathways to assist with Executive Director transition.

Goal 2: Support staff/interns/volunteers to relieve some work of leadership staff by end 2022.

Objective 1: By mid 2021, define tasks currently administered by leadership staff that could be administered by support staff, how leadership staff would oversee support staff and tasks, and what work leadership staff would conduct if such tasks are taken off their plate. Use this information to conduct financial cost-benefit analysis of hiring support staff.

Objective 2: By end 2021, build job descriptions around defined support staff tasks and determine if the job is best fit for a volunteer, intern, PT or FT employee.

Objective 3: During 2022, hire appropriate support staff in instances where benefits outweigh costs.

Goal 3: Put systems in place to improve efficiency of staff communication and collaboration (immediately).

Objective 1: Reduce staff meeting time thereby reducing its contribution to overhead, by creating systems and guidelines for improving staff communication (immediately).

Goal 4: Define and document procedures and product standards and having all staff follow by end 2020.

Objective 1: Standardize client communications process for contract work from start to finish of any job.

Objective 2: Standardize administrative procedures for contract work, including database management, time tracking, billing and bookkeeping, from start to finish of any job.

Objective 3: Define product standards and process for executing contract work from start to finish of any job.

Objective 4: Supervisors orient staff to system and standards and monitor progress to ensure they are implemented.

Goal 5: Streamline internal monitoring of profit/loss by projects/programs/staff

Objective 1: (see Focus Area 1/Goal 1/Objectives 1 and 2)

Objective 2: Ensure systems are accessible and utilized by all employees and supervisors by the end of 2020.

Objective 3: Improve system to conduct quarterly and annual reviews between employee and supervisor that evaluate project success and efficiency as part of employee work evaluations and plans, by end of 2020.

Goal 6: Ensure company policies are up to date and effective

Objective 1: Internally review, and as necessary modify, all EF policies and make sure they are up to date and effective, include best practices, and are compliant with state and federal laws including ADA, OSHA, FLSA, FICA, and Family Medical Leave Act by end of 2020.

Objective 2: Create new policies as necessary such that EF is compliant with all laws and following best practices for nonprofits by end of 2020.

Objective 3: Review policies with applicable board and staff annually to ensure that policies are properly followed and enforced.

3. Organizational Growth and Stability: *Organizational Culture*

Key Indicators of Success:

- Annual review is used to gauge staff enthusiasm for EcoForesters' mission, job satisfaction, whether they have proper guidance and support and sufficient room for professional development.
- Staff adheres to all policies set forth in the employee handbook.

- Open communication channels are maintained and problems are resolved in a positive, professional and respectful manner. Management staff keeps all employees informed of big picture organizational direction and issues.
- Staff work well together as a team and independently as needed.
- Performance goals in place with appropriate compensation growth.
- Board is engaged at appropriate level in organizational guidance and oversight

Goal 1: Commitment of leadership of keeping open lines of communication between staff (ongoing).

Objective 1: Leadership staff will prioritize being open and available to provide guidance to staff on projects as needed.

Objective 2: Leadership staff will check in individually with staff they supervise at least every other week to discuss work plans and any questions or concerns.

Objective 3: Maintain monthly staff meetings for leadership staff to discuss big picture issues that concern all staff.

Objective 4: Leadership will inform staff promptly and appropriately of any significant organizational changes that may be of concern.

Goal 2: Refine formal review process to have more measurable goals, annual work plan that ties to strategic plan goals, closer look at efficiency/profitability.

Objective 1: (see Focus Area 1/Goal 3)

Objective 2: Provide staff with appropriate COL compensation adjustment

Objective 3: Offer incentives for staff to pursue additional certifications

Goal 3: Maintain formal and informal staff interactions with time to reflect on organizational challenges and opportunities as well as improve staff relationships

Objective 1: Maintain at least monthly all staff meetings and improve efficiency by reducing meeting times and limiting agenda topics to items that are inclusive of all staff input/discussion. Conduct other meetings between smaller groups of staff as needed (immediate).

Objective 2: Scheduled meetings between staff should have an agenda and scheduled time not to exceed with goal being to finish meetings early. Impromptu meetings between staff should be conducted only if immediately necessary and staff should be mindful of efficiency in these meetings (immediate).

Objective 3: Maintain monthly staff lunch and at least one other fun informal gathering per year.

Goal 4: Improve board relationships by more active board committees.

Objective 1: Review existing committees and modify who is on each committee and the committee's roles and responsibilities by the end of 2020.

Objective 2: Staff representative and committee chairs determine meeting schedule and committee annual goals by the end of 2020.

Goal 5: Strategically grow the board.

Objective 1: Consider strengths and weaknesses of existing board and conduct a search for an additional 2 board members to strategically strengthen the board by end of 2020.

Objective 2: Vote on 2 additional board members by the end of 2021, increasing the size of the board to 11 members.

4. Building More Robust Programs: *Outreach and Education*

Key Indicators of Success:

- Increased awareness of EF and more word of mouth referrals
- EF trained and sponsored peer networks in place and supported
- New speaking opportunities with professional or community groups
- Active with partners resulting in collaborative projects with other local nonprofits
- Formation of client referral program
- Landowners have improved stewardship ethic and knowledge of forestry issues
- Improved public's understanding of need for ecological forestry
- Clear connection between EF stewardship and climate change mitigation
- Diverse donor base
- Membership program with contact opportunities between members and board/staff

Goal 1: reach 3,000+ landowners per year.
<i>Objective 1:</i> 300 in-person.
<i>Objective 2:</i> 3,000 online and via mail.
Goal 2: Strategically increase individual landowner engagement.
<i>Objective 1:</i> Engage 2 current EF clients around becoming an EF “ambassador” by end of 2020.
<i>Objective 2:</i> Prioritize landowner outreach using landscape conservation goals (i.e. watershed protection, conservation lands, etc.) by end 2020.
Goal 3: Engage landowners virtually and EF increase video content.
<i>Objective 1:</i> Hold a landowner tour webinar by Spring 2021.
<i>Objective 2:</i> Video 2 landowners discussing their stewardship goals and plans each year. Use videos to augment virtual landowner tours.
Goal 4: Increase speaking engagements for EF staff.
<i>Objective 1:</i> Schedule one speaking engagement per quarter. (Ongoing)
Goal 5: Identify the source of how landowners learned about EF.
<i>Objective 1:</i> Ask every person that contacts EF how they heard about us.
Goal 6: Increase marketing and outreach of EF to landowners and general public through various media (client emails, news media, social media, website, advertising, print etc).
<i>Objective 1:</i> Develop annual plan, leveraging expertise of appropriate committee(s), to increase exposure of EF to landowners and general public starting by beginning 2021.
<i>Objective 2:</i> Explore alternatives for design work (hiring a graphic designer, recruiting an intern or a design student) to outsource redesign of newsletter template and regular newsletter design as well as annual report and outward-facing strategic plan publication.
Goal 7: Clear communication standards and definitions for approaching different interest groups/donor types.

Objective 1: GEM committee to identify strategy and best terms for communicating to all supporter types and better unify messaging.

Objective 2: Set up a glossary of definitions for technical forestry terms with hyperlinks on the website by end of 2020.

Goal 8: Improve and more easily communicate EF brand.

Objective 1: Restore EF marketing budget through increased fundraising in 2021.

Objective 2: Seek funds for professional branding and website improvements in 2021.

5. Building More Robust Programs: *Forest Restoration and Invasive Species Control Services*

Key Indicators of Success:

- Increased revenue and profit
- Increased acre footprint
- Increased suite of services offered

Goal 1: Generate \$100,000 in invasive control revenue by end of 2020.

Objective 1: Get a SAMS number and inquire about contracts with USFS and NPS (within 2 months).

Objective 2: Contact current and former clients who have timber sales planned within next 5 years.

Objective 3: Sustain invasives crew year round so that is not just seasonal work, starting winter 2020-21.

Objective 4: Sustain and increase clients through goals and objectives specified in outreach/education section above.

Goal 2: Create a 2nd invasives crew to implement work by summer 2021 while increasing demand for invasives work to \$200,000 annually in 2021-23.

Objective 1: Hire and groom a 2nd invasives crew leader by fall 2020 that also has forestry skills so they can help with multiple facets of EF's work.

Objective 2: Sustain current level of funding for Sandy Mush invasives work while also finding match funding for Invasive Stewardship Fund.

Objective 3: Continue and leverage work from goal 1 objectives 1-4 above.

Goal 3: Diversify work of invasive crew to pre-commercial forest restoration treatments such as thinnings, tree planting, crop tree release and timber stand improvement.

Objective 1: Generate \$20,000 in forest restoration treatments (other than invasives control) by end 2021 and increase to \$40,000/year by end 2023.

Objective 2: Leverage revenue from objective 1 above to enhance "winter work" to provide year round employment for invasives crew through winter 2020-21 and thereafter.

6. Building More Robust Programs: *Forestry Consulting Services*

Key Indicators of Success:

- Increased revenue and profit
- Increased acre footprint

Goal 1: 2021-2023: Write ~60 Forest Stewardship Plans per year, generating \$150,000/year average in revenue.

Objective 1: Contact recent buyers of forestland (need access to realty database?).

Objective 2: Develop relationship with realtor(s) to identify potential clients.

Objective 3: Contact former clients and ask for referrals.

Goal 2: 2021-2023: Generate \$100,000 revenue in timber sales (\$33,000 annual average).

Objective 1: Set up system to annually contact current and former management plans clients due for a timber sale.

Objective 2: Investigate cost (and time) of adding FMP-database to Salesforce, and how that could help with objective to contact clients needing work.

Goal 3: 2021-2023: Generate \$75,000 in timber appraisals (average \$25,000/year).

Objective 1: Offer as part of a management planning process.

Objective 2: Target new forestland owners (through real estate transactions) to assess their timber basis.

Goal 4: 2021-2023: Generate \$30,000 in general consulting revenue (average \$10,000/yr).

Objective 1: Develop referral program (existing clients, real estate agents?) to increase potential client traffic.

Objective 2: Quantify impact of forest restoration using carbon/climate change based metrics.

Goal 5: Explore offering new services like controlled burning, agroforestry, or urban forestry by 2023.

Objective 1: Assess demand for these services by surveying existing clients.

Objective 2: Consider partnering with other groups. E.g.: Wildwood Forestry (controlled burning); Warren Wilson College (non-timber forest products); GreenWorks (urban forestry).

7. Building More Robust Programs: *Landscape Scale Forest Conservation and Stewardship Projects*

Key Indicators of Success:

- Increased revenue
- Increased acre footprint
- Increased landowner engagement
- Increased landowner stewardship activities

Goal 1: Increase stewardship participation in Sandy Mush.

Objective 1: Form and nurture at least one stewardship peer group in year 2 of Sandy Mush Forest Restoration Project

Objective 2: Initiate and support at least one stewardship peer group each year of Sandy Mush Forest Restoration Project.

Goal 2: Train landowners in non-native invasive species control.

Objective 1: Hold landowner training annually in Sandy Mush.

Goal 3: Participate in one U.S. Forest Service project planning or implementation.

Objective 1: Bid on at least one U.S. Forest Service Non-native Invasive Species control project in 2021.

Objective 2: Help Nantahala Pisgah Forest Partnership plan ecological restoration project on Pisgah or Nantahala.

Goal 3: Collaborate with Land Trust(s) to outreach to landowners abutting conservation lands.

Objective 1: Reach out to land trusts to jointly engage landowners in 2021.

Objective 2: Find match for Community Foundation of WNC Invasive Stewardship Fund grant funds by end of 2020.