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# **Strategic Plan**

## **2016-2020**

Summer, 2016

## Introduction

The Massachusetts Forest Alliance (MFA) was formed in 2012. In 2014, the MFA Board of Directors initiated a strategic planning process, assisted by consultant Charles Levesque of Innovative Natural Resource Solutions, LLC. The Board process included surveys of members and in-depth interviews with a variety of opinion leaders, inside and outside the membership. The surveys, interviews and review of key data provided a profile of the state of forestry, forest stewardship and the forest products industry in Massachusetts. Mr. Levesque prepared a report entitled *“Background Report for the Massachusetts Forest Alliance Board of Directors - in preparation for strategic planning work – July, 2015”* to summarize the stakeholder and external research. The report allowed the board and other participants in the subsequent strategic planning process to work from a common understanding about the internal and external situation surrounding MFA. The consultant further condensed the report’s findings into a presentation for a board retreat.

The strategic planning process culminated in an initial strategic retreat meeting of the Board on August 5, 2015 where the core of this Plan was developed. Follow up work by the board during the fall and winter of 2015-2016 led to the completed Strategic Plan.

The strategic planning process developed the following key policy statements:

- **Mission** – the ultimate description of “what” the organization is.
- **Vision** - an articulation of where MFA wants to be – or what its “world” should look like - relative to its Mission and in a given time-period.
- **Goals** – a series of “what” statements that are measurable (or can lead to measurable indicators) and directly related to the Vision and Mission.
- **Objectives/strategies** – a series of “how” statements that describe how the organization will reach the goals through its programs.
- **Indicators** – articulation of specific actions and measurable benchmarks that allow the organization to assess whether it is making progress towards its Goals.

## **MISSION**

The Massachusetts Forest Alliance advocates and educates for the community benefits associated with sustainable forests, responsible forest management, a strong forest economy, private landowner rights and the continuation of working forests on public and private lands.

## **VISION**

In 2035, Massachusetts forestry and the manufacturing sector dependent on it will be seen by residents as something essential, sustainable, environmentally sound and a positive part of life and the economy of the Commonwealth. Sound forest policy and management practices have made it possible to maintain our clean air and water, wildlife habitats, recreational opportunities and the quality of life for our communities. Policy makers at all levels now assure that laws and regulations value and respect forest landowners, forestry and the forest products industry. There has been an expansion of a full suite of markets for forest products. With full market opportunities, forest landowners make a better monetary return than ever, providing further reason for them to maintain their forests as forests. Citizens and government seek out forest products grown in the Commonwealth as part of their regular purchases, thereby enhancing local economies.

## GOALS

*“Direct” Goals (1-5)*

### **Goal 1 – Advocacy**

**Foster a legal and regulatory environment in the Commonwealth - both at the state and local level - that supports and enhances the ability of forest landowners, foresters, loggers, truckers, and mills to operate profitably and thrive.**

*Objective 1.1* – Organize and appoint a policy committee representing all MFA interests, with adequate non-board membership participation, to: monitor, identify, prioritize, and analyze issues; and to develop coherent public policy position recommendations for the board and membership.

*Indicator 1.1.a: There is a stable committee composition, with replacements appointed quickly as needed.*

*Indicator 1.1.b: There is a committee with at least one each of the following: forest landowner, forester, wood producer and a member who is neither paid staff, nor one of those three categories.*

*Indicator 1.1.c: There is at least a quarterly review and written summary of current and long-term issues.*

*Indicator 1.1.d: There is at least a quarterly meeting, in-person or by conference call, to discuss issues and articulate positions as needed.*

*Indicator 1.1.e: A Policy Update is published regularly in the Woodland Steward, on the website and via social media.*

*Indicator 1.1.f: There is a published annual report of issues reviewed and those acted on by the committee, with positions taken and explanations. Review should indicate whether issue is settled or ongoing, and whether settled in line with MFA position.*

*Objective 1.2* – Fund and support a consistent, capable and respectful voice on core issues, legislation, and regulation in Boston. This person should be someone familiar with land, forest policy, and forest products industry issues, as well as legislative and regulatory processes.

*Indicator 1.2.a: There is an executive director, staff specialist, or consultant qualified to perform key duties in the field of regulatory and legislative relations.*

*Indicator 1.2.b: The above individual provides leadership for the Policy Committee.*

*Indicator 1.2.c: The person in this position provides an annual report of activities and contacts.*

*Objective 1.3* – Develop mutually respectful relationships with key organizations that are likely to be allies on some issues, opponents on others, so that discussions can be productive even when positions clash. Advocate in partnership with these organizations when mutually beneficial.

Continue to work closely with Farm Bureau in that regard.

*Indicator 1.3.a: There is a list of organizations most likely to be important to achieve this objective.*

*Indicator 1.3.b: Full use is made of the current structures such as the Agricultural Promotional Board and the Massachusetts Farm Bureau Federation’s commodity round table.*

*Indicator 1.3.c: Contact is made with each of those organizations as needed on specific issues.*

*Indicator 1.3.d: Contact has been made with those organizations at least 3 times a year, even when no current issues are pressing.*

*Indicator 1.3.e: Review at least annually to evaluate whether there are new “players” to engage.*

*Indicator 1.3.f: The Ex Dir. and the committee have reported on relationships with key organizations (positive / negative), contact person etc.*

Objective 1.4 – Initiate a statewide effort to improve understanding and correct misconceptions of forest management in cities and towns, especially where town boards actively oppose forestry; whenever possible, work cooperatively with DCR in this effort.

*Indicator 1.4.a: There is a list of cities and towns where there are “problems”.*

*Indicator 1.4.b: There are materials and approaches suitable for the type and scope of the problem.*

*Indicator 1.4.c: MFA meets at least annually with DCR to review state of play and efforts needed.*

*Indicator 1.4.d MFA communicates within and with the existing networks of agricultural commissions to maintain contact with municipalities and to coordinate on forestry issues with them.*

## **Goal 2 – Education & Communications**

**Assure that policy makers and the public have a better understanding of the ways in which forests, forestry and the forest products industry benefit all citizens of the Commonwealth.**

Objective 2.1 – Conduct a systematic review of current informational and educational offerings available to policymakers, foresters, industry workers, landowners and the public. Identify gaps and opportunities, with the idea of finding the “sweet spot” for a small organization like MFA.

*Indicator 2.1.a: MFA has worked with other organizations to create an inventory of available, easy to access information.*

*Indicator 2.1.b: MFA has determined what is utilized by each of the following categories – policymakers; foresters, industry workers, landowners, and the public.*

*Indicator 2.1.c: MFA has identified attainable opportunities to fill gaps, or correct inaccurate sources.*

*Indicator 2.1.d: MFA has included these activities in an annual report.*

Objective 2.2 - Hold regular tours of forestry operations or forest products manufacturers for policy makers in geographically distributed locations. Include key people from EOEEA, DCR and Fish & Wildlife in the tours. Include land trusts, conservation organizations, sporting clubs and other beneficiaries of good forest management in these offerings to strengthen and broaden the message.

*Indicator 2.2.a: MFA has held at least two meetings annually.*

*Indicator 2.2.b: There is representation from at least two executive branch departments at each meeting*

*Indicator 2.2.c: There is attendance from at least 4 non state agency partners, such as not for profits, municipalities, or the federal government.*

*Indicator 2.2.d Statistics on the tours are included in an annual report.*

Objective 2.3 – Include electronic communication and social media tools as part of overall communication with policy makers.

*Indicator 2.3.a: There is a social media following that includes at least 10 key members of the legislature and agency staff*

*Indicator 2.3.b: There is a communication medium for policy makers and interested individuals that highlights policy issues of organizational importance.*

*Indicator 2.3.c: Such activities, including the number of contacts, is in an annual report.*

Objective 2.4 – Team with Farm Bureau on meetings about forestry and farming in MA where invited state representatives and senators are the key audience.

*Indicator 2.4.a: There is significant attendance of our members at MFBBF legislative breakfasts.*

*Indicator 2.4.b: There has been at least one successful member engagement event each year with elected officials and members in attendance.*

*Indicator 2.4.c: The number of elected officials attending is included in an annual report.*

Objective 2.5 - Offer regular articles on good forestry and about forest products businesses in the community to local papers.

*Indicator 2.5.a: There is a list of contacts with local papers.*

*Indicator 2.5.b: At least six articles a year are sent to those papers, with content that includes information about forestry, or forest products businesses.*

*Indicator 2.5.c: At least four such stories are published per year somewhere in the Commonwealth.*

*Indicator 2.5.d: The results have been included in an annual report.*

Objective 2.6 - Produce regular fact sheets for policy makers focused on the economic value of the forest products industry, including key statistics on jobs, payrolls, value-added, acres, and any other relevant metrics, including ecosystem services. These fact sheets could take several forms (e.g., annual calendar mailed to policy makers).

*Indicator 2.6.a: MFA has access to the best source of data on a county basis for the economic analysis of our industry.*

*Indicator 2.6.b: MFA has published county fact sheets annually based on a consistent source of data.*

*Indicator 2.6.c: The information on the fact sheets and their dissemination has been included in an annual report.*

Objective 2.7 - Enhance relationship with Project Learning Tree by offering assistance with teacher training, field days, guest presenters in the classroom, and potential field trips for students. Expand the impact of Project Learning Tree by increasing support from AFF and others.

*Indicator 2.7.a: MFA has met at least annually with PLT organizers.*

*Indicator 2.7.b: At least 3 foresters attend meetings/workshops each year with PLT.*

*Indicator 2.7.c: MFA's Project Learning Tree activities are in an annual report.*

Objective 2.8 - Work with Foresters Council to provide school groups and teachers with regular opportunities to get into the woods and see the links among forestry, wildlife habitat, and sustainably produced forest products used by all.

*Indicator 2.8.a: Foresters Council has sponsored or hosted at least one workshop each year specifically geared towards children.*

*Indicator 2.8.b: Foresters Council activities and highlights are included in an annual report.*

### **Goal 3 – Membership Communication**

***Effectively and regularly communicate important forestry/forest products related information to MFA members.***

Objective 3.1 – Publish The Woodland Steward (TWS):

*Indicator 3.1.a: Four issues of TWS magazine per year covering a full range of topics for all MFA members has been published.*

*Indicator 3.1.b: Each MFA director has supplied – written or arranged for - a minimum of one printable article per year for TWS on a topic of their choice relevant to the organization and its membership.*

*Indicator 3.1.c: The Woodland Steward is relevant, improves in quality and is financially self-sufficient.*

Objective 3.2 – Distribute an “action alert” bi-weekly MFA news update via e-mail and Facebook to all members able to receive. The update should include legislative activity, education and training opportunities, profiles on members and other MFA or related activities of interest to the membership.

*Indicator 3.2.a: Twenty alerts were sent in the year.*

*Indicator 3.2.b: Each of the 20 include at least 2 of the following categories: legislative activity, education and training opportunities; profile on members; other current events or items of interest to the membership.*

*Indicator 3.2.c: There is a readership of at least 100.*

*Indicator 3.2.d: There is an open rate of at least 20%.*

Objective 3.3 – Create content for Facebook that will generate interest, reposting, and discussion. Get members to "friend" our page.

*Indicator 3.3.a: There are at least 300 followers/friends.*

*Indicator 3.3.b: At least one MFA created item each month is shared at least 20 times.*

*Indicator 3.3.c: There is an article from each issue of TWS posted on the page.*

*Indicator 3.3.d: There is an item each month that generates at least 10 comments.*

Objective 3.4 – Survey members regularly about what they would like MFA to do for them.

*Indicator 3.4.a: There is an online survey mechanism to generate feedback.*

*Indicator 3.4.b: The survey has been utilized to seek detailed input from one of the subcategories of membership each year.*

*Indicator 3.4.c: The results have been shared with the membership.*

Objective 3.5 - Provide more information to members about timber markets and their opportunities in them.

*Indicator 3.5.a: TWS has a regular feature or sidebar for timber market news*

*Indicator 3.5.b: have, at least 2 times a year, a “case study” or story about a timber products opportunity for landowners.*

Objective 3.6 - Provide information for members to engage their heirs in keeping their forest in forest. Partner with other conservation organizations to support this.

*Indicator 3.6.a: There is at least one workshop each year on this topic.*

*Indicator 3.6.b: The membership has access to a directory of service providers/information sources on the topic.*

#### **Goal 4 – Continuing Education**

***Offer training and educational opportunities to all membership groups within the organization.***

Objective 4.1 – Annually, provide at least two training/educational events each for loggers, foresters and landowners that include continuing education credits for the professional offerings. Consider that some of these be dinner events. Partner with other organizations such as UMass, Christmas tree growers, maple syrup producers, nurseries, etc. Assure that each event is at least revenue-neutral, but generates net revenue when possible.

*Indicator 4.1.a: There are at least two events for loggers with at least 20 loggers attending.*

*Indicator 4.1.b: There are at least two events for foresters with at least 20 foresters attending.*

*Indicator 4.1.c: There are at least two events for landowners with at least 20 landowners attending.*

*Indicator 4.1.d: At least 4 of the events are jointly-sponsored with partner organizations.*

*Indicator 4.1.e: The events, in aggregate, generate positive cash flow annually.*

Objective 4.2 - Training/educational events offered for members should include information that can attract new members. Non-member groups should be targeted in the program announcement.

*Indicator 4.2.a: Half of the events involve specific invitations to non-members.*

*Indicator 4.2.b: Half of the events involve a partner made up of primarily non MFA members.*

Objective 4.3 – Continue to sponsor and administer the Massachusetts Tree Farm Program.

*Indicator 4.3.a: There is a paid Tree Farm Program administrator*

*Indicator 4.3.b: MFA, through MFT, is the formal sponsor of the Tree Farm Program.*

*Indicator 4.3.c: A signed memorandum of agreement governs the relationship between MFA and the Tree Farm Program.*

*Indicator 4.3.d: TWS regularly publishes Tree Farm Program news.*

Objective 4.4 – Make the annual Tree Farm Field Day more inclusive.

*Indicator 4.4.a: A Tree Farm Field Day was co-hosted by MFA.*

*Indicator 4.4.b: Tree Farm members, and nonmembers, attend the Tree Farm Field Day.*

## **Goal 5 – Economic Development**

***Facilitate the maintenance of current forest products markets and encourage new markets in the Commonwealth.***

Objective 5.1 – Survey forest products manufacturers in the Commonwealth to evaluate the feasibility of MFA providing useful services to producers.

*Indicator 5.1.a: Members have been surveyed at least once every 5 years to determine what services they would see value in MFA providing.*

*Indicator 5.1.b: The cost and benefit of providing such services has been determined.*

*Indicator 5.1.c: The board has evaluated each idea presented by the members and determined if it is worth pursuing.*

Objective 5.2 – Provide leadership via the Statewide Wood Energy Team to expand renewable wood energy opportunities in the Commonwealth.

*Indicator 5.2.a: At least 4 SWET meetings are held each year.*

*Indicator 5.2.b: A staff person is employed to assist with SWET activities.*

*Indicator 5.2.c: At least two pages of the Woodland Steward are dedicated to wood energy items that are priority items for the SWET.*

*Indicator 5.2.d: Sponsorship opportunities for the SWET are available in the activities and workshops of the MFA.*

Objective 5.3 – Work to encourage low grade markets in MA.

*Indicator 5.3.a: There is ongoing dialogue with DOER around the importance of the low grade markets.*

*Indicator 5.3.b: Engage the Executive Office of Housing and Economic Development to advance understanding of the importance of low grade markets for achieving the Commonwealth's broad environmental goals.*

*Indicator 5.3.c: DFW, DAR, and DCR are advocates for low grade markets as important to good forestry, healthy forests, and wildlife habitat.*

*Indicator 5.3.d: Low grade product users are funding efforts to address low grade market issues.*

Objective 5.4 – Promote the use of local wood products with the building trades organizations and architects.

*Indicator 5.4.a: There is a forest products utilization expert at DCR.*

*Indicator 5.4.b: Each regional "Buy Local" organization has materials regarding local wood products.*

Objective 5.5 – Advocate for landowner and producer opportunities within the Mohawk Trail Woodlands Partnership, insuring that the economic development component of the project remains central to the project as it moves forward.

*Indicator 5.5.a: Each meeting of the MTWP advisory board is attended by an MFA staff person or board member.*

*Indicator 5.5.b: MFA played a key role in the drafting of any legislation or bylaws of the organization.*

Objective 5.6 – Work with the state to incentivize the use of local wood and advanced wood products in state funded buildings.

*Indicator 5.6.a: Preferential treatment for local wood in statewide procurement contracts for wood products is the norm.*

*Indicator 5.6.b: There is at least one event each year that shows and promotes wood buildings funded by the state.*

*Indirect Goals – supporting goals 1-5 (6-9)*

## **Goal 6 – Governance**

***Assure an active, dynamic MFA board leadership with regularly changing personnel.***

Objective 6.1 – Create a standing nominating committee with at least 3 members whose responsibility shall be to secure active, committed new members for the board and committees as terms end and as people cycle through committees.

*Indicator 6.1.a: There is a committee with a chair that has met in person or on the phone at least twice in advance of each annual meeting.*

*Indicator 6.1.b: There is at least one nomination for each empty board position.*

*Indicator 6.1.c: There is at least one landowner, one forester, and one wood producer on the nomination committee.*

Objective 6.2 – Assure training for all new board members that fosters commitment to the organization and an understanding of how activity today has an impact in the long term health of forestry and the forest products industry in the Commonwealth.

*Indicator 6.2.a: There is at least one training event each year for all new board members and new committee members.*

Objective 6.3 – Develop and institute a Board member “job description” that clearly describes what is expected of each member. Assure that the candidate understands and agrees to participate before attending initial Board training.

*Indicator 6.3.a: There is a current Board job description in place.*

*Indicator 6.3.b: Each board member has agreed to serve in accordance with the terms of the board job description.*

Objective 6.4 – When possible, develop opportunities for each of the Councils to participate at a multi-state, or regional, level, as well as at a statewide level.

*Indicator 6.4.a: There are at least two opportunities for participation for each council that involve issues beyond Massachusetts boundaries.*

*Indicator 6.4.b: The opportunities have been shared with council members.*

*Indicator 6.4.c: At least one council member attended at least one such event each year.*

## **Goal 7 – Finances**

***Develop a 5-year budget for MFA that reflects what is needed to achieve Goals 1-5. Develop fundraising approaches to deliver that budget.***

Objective 7.1 – Based on the 5-year budget developed to carry out this strategic plan, annually develop and adopt by March 31, a detailed budget for the next fiscal year beginning July 1.

*Indicator 7.1.a: There is an annual budget.*

*Indicator 7.1.b: Reports are made, on a quarterly basis, on the progress within the budget.*

Objective 7.2 - Create a standing fundraising committee with at least 3 members to develop and implement a plan, once it receives board approval, for fundraising for the coming fiscal year to meet the revenue needs developed in the annual budget.

*Indicator 7.2.a: The fundraising committee has at least one forester, one wood producer, and one landowner.*

*Indicator 7.2.b: There is a fundraising plan.*

*Indicator 7.2.c: Quarterly goals are set and pursued for fundraising.*

*Indicator 7.2.d: On a quarterly basis, progress on goals is reported to the Board.*

Objective 7.3 – Each director will, annually, raise at least \$5,000 (give or get) for MFA..

*Indicator 7.3.a: Each director is aware of this goal, which is clearly stated in the Board job description.*

*Indicator 7.3.b: Progress towards the individual goals is discussed at least semi-annually with the board.*

Objective 7.4 – Conduct personal visits by board members and the executive director to meet with individuals and companies that have given strong financial support and those that benefit from the work of MFA.

*Indicator 7.4.a: Develop information sufficient to demonstrate that real value results from strong financial support.*

*Indicator 7.4.b: Packets that target each of the following groups: landowners, foresters, wood producers, and low grade wood users, are available.*

*Indicator 7.4.c: Each director visits at least two prospects with the Executive Director.*

Objective 7.5 – Broaden fundraising to include secondary manufacturers (especially paper-related entities) that currently neither belong, nor contribute to MFA.

*Indicator 7.5.a: The fundraising committee has generated a list of leads of secondary manufacturers.*

*Indicator 7.5.b: The fundraising committee has worked with the Executive Director to write a targeted letter*

*Indicator 7.5.c: At least 4 such prospects have been visited.*

Objective 7.6 – Solicit and evaluate a range of ideas to raise revenue for MFA, including existing and new avenues.

*Indicator 7.6.a: The membership has been polled, at least annually, broadly and in smaller, targeted settings, for revenue ideas.*

*Indicator 7.6.b: A description of fundraising strategy and evaluation of results is produced and updated annually.*

*Indicator 7.6.c: A discussion of fundraising strategy is an agenda item at least twice annually at board meetings.*

## **Goal 8 – Membership**

***Increase the membership of MFA across all membership sectors during the strategic plan period.***

Objective 8.1 - Create a membership committee with at least 3 members whose first task is to develop a membership growth plan for the next year as part of the organizational goal to increase membership 10% per year to a level of 800 by the year 2020.

*Indicator 8.1.a: A fundraising committee with at least one forester, one wood producer, and one landowner is in place.*

*Indicator 8.1.b: That committee has met at least 4 times a year.*

*Indicator 8.1.c: There is a membership plan that presents a path to 800 members by 2020.*

*Indicator 8.1.d The plan has a role for board members, with various participation levels.*

Objective 8.2– Each board member should commit to a plan of membership recruitment, compatible with their individual capabilities.

*Indicator 8.2.a: Each board member has developed a very short but personal recruitment plan with escalating involvement.*

*Indicator 8.2.b: Each board member has submitted such a plan to the Executive Director.*

*Indicator 8.2.c: The plan is reviewed and discussed as an agenda item, at least twice a year, either at board meetings, or individually with board members.*

Objective 8.3 – Begin a grass roots effort to connect with the wood producers segment of the Commonwealth to encourage membership and MFA participation in this sector.

*Indicator 8.3.a There is a list of wood producers in the Commonwealth.*

*Indicator 8.4.b There is a fact sheet on advantages of an MFA membership.*

*Indicator 8.4.c Current members approach non-members and report on same annually.*

Objective 8.4 - Approach town arborists arborist organizations, sporting and fishing clubs, snowmobile clubs, mountain bikers, equestrian clubs, hiking and tracking clubs, Mass Maple Producers, landscapers, small acreage owners, and others to increase MFA membership.

*Indicator 8.4.a: MFA has a list of other such organizations.*

*Indicator 8.4.b: There is an opportunity for affiliate memberships.*

*Indicator 8.4.c: At least 4 times a year MFA attends a gathering of such groups to solicit members and share the work of MFA.*

*Indicator 8.4.d: The Executive Director and board will produce a brief assessment report on the extent of these efforts, successes, failures, and recommendations for improvement, at least annually.*

Objective 8.5 – Create incentives for members to get others to join MFA.

*Indicator 8.5.a: There are at least two such incentives.*

*Indicator 8.5.b: The use of such incentives is tracked.*

*Indicator 8.5.c: The effectiveness of the incentives is reported on.*

Objective 8.6 – Develop communication materials and get the word out about the benefits of membership in MFA.

*Indicator 8.6.a: There is an up to date membership brochure.*

*Indicator 8.6.b: There is an up to date benefits flyer for each target audience.*

Objective 8.7 – Make sure programs are attractive to potential members and have registration fees for members that are less than for non-members.

*Indicator 1.4.a: There are at least 4 events each year that target new members.*

*Indicator 1.4.b: Fees for programming incentivize joining MFA.*

## **Goal 9 – Staffing**

***Retain a dynamic MFA executive director and support staff who together can lead the organization successfully through this next phase of its existence.***

Objective 9.1 – Improve mutual support between board and staff through regular meetings. The Executive Committee will meet with the ED at least every other month to discuss activity and procedures. The responsibilities of the ED will be reviewed to determine workload priorities and to look for possible efficiencies.

*Indicator 1.4.a: There are regular meetings by conference call or in person with the executive committee and the Executive Director.*

*Indicator 1.4.b: The Executive Director reports to the full board in a mutually acceptable format at least monthly*

*Indicator 1.4.c: There is consistent feedback and review of staff priorities at least once a quarter.*