

# **Forest History Society Strategic Plan Summary 2022 – 2032**

## **Mission**

**To preserve and help people use the documents of forest history. The Forest History Society identifies, collects, interprets, and disseminates historical information on the relationship of humans and forests, contributing to informed natural resource decision-making.**

## **Vision**

**FHS will remain the recognized leader in forest history and the primary contact for inquiries from around the world. Its archives will remain unsurpassed. Its outreach efforts to make history relevant to current forest policy and management will become its hallmark.**

### **The values we believe in:**

- The continuity and interconnectedness of forests and human events and that knowledge of the past provides insights to guide the future.
- Documenting the diversity of peoples' relationships and experiences with forests through time, and encouraging all individuals and groups to share their stories and perspectives.
- Bringing the lessons of forest history to bear on the complex social, ecological, economic and political forest policy issues of today.
- Preservation of records of historical significance, and maintaining their quality and integrity to serve present and future generations.
- Scholarship and the importance of applying intellectual skills to advance excellence in the study, analysis, and interpretation of forest and conservation history.
- Sharing information and knowledge among all interested in forests and conservation, and contributing to a public enlightenment about the values that the forests have had for humankind.
- Partnerships and the ensuing synergy among those who wish to support, preserve, study, and apply our heritage of forests and conservation; and our responsibility to contribute to an international network of interested citizens.

## **Introduction**

This aspirational plan charts five goals and a focused collection of strategies, tactics and measures to guide the general direction of the Forest History Society for 10 years, from 2022-2032, with a mid-point review in 2027.

It flows from robust interaction with the Board of Directors, Chief Executive and FHS staff and is informed by input from Society members and with insight about best practices and emerging technologies from leading cooperative archives and libraries.

The plan establishes a general planning context, lays out a set of emphases, and vests authority in the society's Chief Executive and staff to develop and implement annual plans of work. It is a thoughtful set of strategies and tactics that undertaken by staff, Board, Society members and partners can move the Society toward desired goal outcomes.

### **Key emphases for this planning period**

Past FHS strategic plans have been successful in laying out bold goals and strategies that have enabled development and use of its comprehensive collections of forest and conservation history; established key staff positions and led to the assembly of a talented team of professionals; and developed a world-class building and facility.

This strategic planning period has five key emphases:

1. Increase Society financial resources to sustain additional staff capacity, including a bold increase in the FHS endowment.
2. Sustain and support an effective and diverse Board and staff;
3. Continue to build FHS collections strategically by seeking diverse new sources. Promote wide use and access of Society holdings.
4. Encourage forest history scholarship and insight by expanding publications and programs.
5. Increase the general relevance, visibility and awareness of forest and conservation history for a diverse range of local, national and international audiences.

### **A living plan**

Our collective intention is for this plan to be a frequently-referred to and useful tool for CEO and staff in planning and implementing work, and for current and future Board members in prioritizing and finding their way forward toward agreed-upon outcomes.

### **Roles in relationship to this plan**

CEO and Staff: utilize the plan to inform priority setting, budget development, annual work planning, staff capacity development and professional development and Board interaction.

Board Members: Track progress toward desired outcomes; orient toward and align with FHS priorities and emphases; support chief executive in implementing strategic actions and priorities; help secure the financial resources for implementation.

## **GOAL 1: Strengthen Financial Resources**

*Secure sufficient financial resources to allow FHS to support its Mission and Vision for the future.*

**Strategy 1.** Increase the FHS Endowment to improve its capacity to sustain and grow programs and to finance a professional and well-paid staff.

### **Tactics**

1. Conduct an Endowment Campaign of \$4 to \$6 million to support FHS strategic initiatives through that add new professional positions and to support competitive staff compensation.
2. Reduce the Endowment's annual withdrawal rate to 4 percent over time, while maintaining FHS programs and staff salaries.
3. Target the Endowment's total investment returns to achieve a 6 percent annual goal net of investment management fees.
4. In addition to forest-related corporate entities, consider approaching non-forest related corporations looking to boost their ESG (Environmental, Social, and Governance) bonafides.

**Strategy 2.** Increase the Annual Fund, including memberships, to provide consistent and sustainable operating funds.

### **Tactics**

1. Grow Annual Fund to a level that will support half of the annual operating expenses.
2. Continue and amplify efforts by the Corporate Acquisition Team to secure new corporate contributions and increase contributions from existing members. Seek opportunities to identify and approach non-timber corporates.
3. Explore ways to provide recognition to corporate donors consistent with the FHS non-advocacy role and independent credibility. Create a corporate introductory information package to increase visibility. Institute an FHS Director level solicitation and stewardship program.
4. Continue acquisition efforts of professional foresters. Develop a state-by-state grassroots membership drive for all registered professional foresters and consulting foresters.
5. Exhibit annually at the SAF Annual Convention and the ASEH Annual Conference. Exhibit at state forestry association meetings and other regional and national meetings on a rotating basis and others that increase the FHS profile. Update FHS profile materials.
6. Increase information transfer with university forestry and environmental schools, the Association of Consulting Foresters, National Association of State Foresters, Sustainable Forestry Initiative, and other allied and diverse groups.

7. Maintain close ties with the Weyerhaeuser family to amplify their understanding of the family's legacy relationship with the FHS. Maintain Weyerhaeuser family representation on the Board of Directors. Increase relationships with other legacy families.
8. Ensure that all candidate and elected FHS Board members understand that it is part of their responsibilities to contribute financially to the Society and to encourage others to give.

**Strategy 3.** Develop and implement a planned giving strategy.

**Tactics**

1. Boost communications with existing individual donors to consider a bequest to the Society.
2. Provide opportunity on annual renewal forms to indicate FHS is cited in a bequest.
3. Identify opportunities and resource needs to establish a larger planned giving program at the Society.
4. Explore potential partners such as Duke University and the Triangle Community Foundation. Consider recruiting a planned giving expert to serve on the Board.
5. Offer estate planning and succession planning educational events for donors.
6. Understand and encourage contributions from donor–advised funds and change in beneficiary designations.

**Strategy 4:** Secure grants and contracts to advance the FHS Mission, augment the annual budget and to launch new programs and/or strategic partnerships.

**Tactics**

1. Entrepreneurially identify and apply for grants and contracts that have a high potential for award.
2. Strengthen relationships with the U.S. Forest Service and secure regular grant funding or cooperative agreements.
3. Seek opportunities for strategic operational or capacity growing grants.
4. Periodically consider making applications for larger, more complex grants such as from NEH, IMLS, major foundations, etc.
5. Develop an awareness of grant opportunities that meet both the strategic goal and inclusivity value.
6. Develop, maintain and communicate to stakeholders a descriptive list of opportunities (and potential associated investment costs) which would impact FHS capacity. (Case for Support)

**Strategy 5:** Provide unquestionable integrity in the management of the financial resources of the Society.

**Tactics**

1. Define and establish an operating reserve target that can be reasonably obtained within the planning period.
2. Identify and seek financial/fundraising accreditation from an appropriate organization, i.e., Charity Navigator; Great Nonprofits; GuideStar. At least one-person on staff should be a member of the Association of Fundraising Professionals.
3. Publish an annual financial/operating report to be published on the web site and shared with donors. Periodically print an annual report for distribution. At a minimum the report should include assets and liabilities, investment performance, and sources and use of operating funds.
4. Review and update (1) a Financial Processes and Procedures manual; (2) FHS Gift Acceptance Policies, including for the reception of non-cash gifts, and (3) an Endowment Management Policy document including background description of each restricted account.
5. Maintain a healthy relationship with an investment advisor that meets the goals established by the FHS.

## **Goal 2 – Ensure Effective Governance to Execute the FHS Strategy**

*Ensure an effective organization by attracting and retaining a high capacity, engaged, and diverse board of directors and staff.*

**Strategy 1:** Evaluate, update, and apply policies that enable the Board to effectively meet its governance responsibility, fiduciary obligations, and to provide strategic direction.

**Tactics**

1. Review and, as needed, update the FHS by-laws and policies that relate to the functioning of the Board and programs.
2. Explore the adoption of a Board management/decision support system to support the Board's governing responsibilities.
3. Review and as appropriate, update approval policies for the annual budget as submitted by the President and CEO.
4. Ensure adequate policies and procedures to recruit, direct, supervise, retain, interact with, evaluate, and compensate the President and CEO.
5. Protect the organization's assets and members' investment in the organization, including human capital, financial assets, physical plant, and equipment and facilities.

**Strategy 2:** Be intentional to maintain and improve Board diversity.

**Tactics**

1. Define the desired diversity strategy outcome. The Nominating Committee may include a range of age, ethnicity, religion and worldviews, consistent with other board needs for expertise, geographical location, employment representation, and fundraising capacity.
2. Develop a plan to achieve the diversity strategy outcome. The Nominating Committee will consider diversity goals when identifying potential board candidates.
3. Maintain and expand the Experience Matrix and Potential Board candidate tools to improve diversity analysis of board members.
4. Review, and as needed, improve current recruitment strategies. Identify ways to attract more women, People of Color, LGBTQIA+, and other diverse backgrounds and characteristics to support the mission and values. Board training focused on diversity, equity and inclusion (DEI) may be an element of improving recruitment strategies.
5. Reduce obstacles to Board service for members who need a financial assist to participate in meetings and events. Consider a variety of ways to reduce obstacles, including video-conferencing.
6. Keep inclusivity and diversity topics at the forefront of the Board's work. Through training, understand our team's (Board and staff) implicit/unconscious biases to help in opening doors to equity. Use Board member expertise to help spark conversations about how we individually interpret and experience discrimination of whatever nature.

**Strategy 3:** Develop and Implement a President and CEO Succession Plan.

**Tactics**

1. Assign the search for a new President/ CEO to the Executive Committee with the help of other Board members and outside counsel as needed. Determine who will draft the plan.
2. Determine what elements need to be in place to attract the best qualified candidates.
3. Determine the nature of the President and CEO transition.

**Strategy 4:** Invest in and Sustain Professional Staff Capacity.

**Tactics**

1. Review and update existing staff policies to ensure a focus on equal opportunity, diversity, professional development, and performance evaluation.
2. Periodically review and assess FHS staff compensation.
3. Assess current workforce capacity and identify additional staffing and financial resources to bolster capacity.
4. Consider joint leadership training for Board and staff when appropriate and when resources allow.

## **GOAL 3: Collect and preserve holdings, and improve access to the FHS Library and Archives**

**Strategy 1:** Identify and acquire a broad array of library and archival collections.

### **Tactics**

1. Be entrepreneurial in identifying collections at risk and be proactive to acquire valuable collections, including identifying and seeking out collections of material where a paucity exists at FHS or elsewhere.
2. After assessing the current archival space available and identifying priorities for acquisition, communicate directly with individuals and organizations identified as priorities in this assessment.
3. Ensure funds and plans are in place to maintain and improve the physical plant to protect, access, and utilize all collections and to ensure staff capacity to acquire, process and maintain enhanced collections.
4. Expand the collection policy of the library materials to be more comprehensive of international publications, children's books, and other currently lightly held resources.

**Strategy 2:** Increase the capacity to create, acquire, and manage digital content in an increasingly diverse range of formats.

### **Tactics**

1. Seek Endowment funding for a digital archivist position to assist with archival collections, especially born-digital material, as well as ongoing digitization projects.
2. Develop a plan for accession and preservation of digital materials as well as print, with clarification of what things FHS can do in-house considering technological limitations, and what things will be done in collaboration with other organizations.
3. Continue existing photograph digitization efforts and expand into new formats, such as archival collections, including paper records, documents, audio, video, and other materials.
4. Increase development of digital exhibits and other website resources.

**Strategy 3:** Establish a national oral history program in forest and conservation history.

### **Tactics**

1. Seek endowment support for an oral historian position and basic program support.
2. Digitize all FHS oral history interviews and make accessible on the web site. Integrate oral history interviews into digital exhibits.

3. Conduct oral history interviews and coordinate with oral history efforts in the US and internationally.
4. Assess the current state of the FHS oral history collection, as well as natural resource related oral histories nationwide; create an inventory and identify deficiencies and gaps (especially related to underserved communities and groups), and create a plan to reduce those deficiencies and gaps, including possible sources of funding.
5. Be entrepreneurial in identifying collections at risk and be proactive in acquiring or creating valuable collections of material where a paucity exists at FHS or elsewhere

**Strategy 4.** Modernize and enhance operations to ensure accessibility of FHS collections to current and future generations.

**Tactics**

1. Update and develop Library and Archives policies and procedures, including collection maintenance and development, data management, digitization, use fees, and disaster preparedness.
2. Evaluate the Inmagic Presto current content management system and consider alternatives.
3. Update and develop plans for existing library technology infrastructure. Consider funding mechanisms to update technology as needed going forward.
4. Develop a searchable option for FHS library holdings on the web site.
5. Encourage and ensure opportunities for professional development and training for library and archives staff to keep up with best practices and technology.

**Strategy 5:** Streamline processes and provide sufficient staffing for information requests, collection maintenance, preservation, and access.

**Tactics**

1. Seek funding to bring on additional support staff to assist with information requests.
2. Increase the efficiency of responding to information requests. Analyze information requests for common themes and create an "FAQ Space" on the FHS website where clients can find answers to commonly asked questions. Improve directions to website users for conducting their own database searches. Consider developing a tutorial. Over time, consider artificial intelligence (AI) opportunities for assisting patrons with queries.
3. Develop an information request policy that prioritizes requests and identifies a fee schedule for longer requests. Communicate this fee schedule to patrons up front.

## **GOAL 4: Expand FHS Programming and Publications**

*Encourage and support scholarship and programs that enhance knowledge of forest history for diverse publics.*

**Strategy 1:** Establish robust public-facing programs through print publications, live-streams, blog posts, films, and more.

### **Tactics**

1. Maintain *Environmental History* as the internationally recognized journal of record in the field, keeping it financially solvent, while exploring partnership opportunities such as funding a special issue on forest and conservation history.
2. Seek funding for public engagement capacity to expand information outreach and educational offerings through meeting, symposia.
3. Position FHS as a center for vital conversations. Foster a series of initiatives and events (conferences, lectures, colloquia, Chautauqua, gatherings) around environmental themes and concerns.
4. Improve and expand FHS programming by 1) developing and sustaining an expanded lecture series beyond the Lynn W. Day Lecture that is hosted by the FHS; and 2) hosting colloquia, symposia, panel sessions, and other programs from the FHS headquarters, including live-streamed events produced by allied organizations.
5. Expand reach and audience by authoring, creating, and publishing films on the diverse and exciting history of American forestry and conservation.
6. Augment print publications by 1) seeking opportunities to publish *Forest History Today* twice yearly; 2) increasing the number of guest contributors to the blog "Peeling Back the Bark;" 3) increasing the frequency of publication of books; 4) expanding the *Issues Series* by publishing on new topics and updating older publications; 5) publishing more monographs and edited volumes on a regular schedule; and 6) examining whether to remain an independent publisher or enter into co-publishing agreements, either exclusive or selective.
7. Develop and put in place protocols to survey and evaluate the effectiveness of FHS's public outreach programs.
8. Maintain and explore ways to expand our longstanding awards program recognizing scholarly achievement and service to forest and conservation history.

**Strategy 2:** Maintain and improve programs in K-12 and continuing education.

### **Tactics**

1. Expand K-12 efforts by securing an Educational Specialist to bring historical context to forest and conservation education.

2. Explore a variety of approaches to expanding FHS educational efforts, including, for example: 1) an AmeriCorps position to focus on local community education with schools; 2) participate with Duke University in outreach programs to Durham Public Schools; 3) discuss internships with university education programs; and 4) cooperate with the North Carolina Forestry Association in the use of FHS content.
3. Provide input into existing K-12 educational programs offered by allied organizations. Seek-out connections with Project Learning Tree and other programs seeking primary material.
4. Develop and put in place protocols to survey and evaluate the effectiveness of Forest History Society K-12 efforts.

**Strategy 3.** Strategically use FHS building space to enhance the accessibility of forest, conservation, and environmental history and generate new partnerships of relevance and support.

**Tactics:**

1. Consider innovative uses of the library that could advance the strategic advantage of the Society (expanding digitizing operations, a maker's space, student related projects in the arts, children's book readings, etc.)
2. Find innovative ways to make the public and the academic world aware of the new building so as to increase its use and the visibility of FHS by 1) developing exhibits for display in Exhibit Hall, and mirroring them with digital exhibits on the website; and 2) utilizing the conference room for presentations and meetings with the Society as either the primary host or in conjunction with other aligned and allied organizations.
3. Finalize policies and procedures for renting the Lynn W. Day Education Center to community groups and allied organizations locally, regionally, and nationally. Post on the web site and distribute informational materials to allied groups.
4. Actively position Durham as a location for large national groups to host a local meeting and come to FHS for small programs and tours. Identify and contact potential groups. Contact local hotels, Discover Durham, and the DCVB.
5. Consider renting extra office space to allied organizations.
6. Explore opportunities to rent the Starker Oral History Studio and other spaces for compatible programs.
7. Upgrade and periodically rotate the exhibits in the L. Michael & Karen Kelly Exhibit Hall to attract visitor groups.

## **GOAL 5: Strengthen Visibility & Engagement**

**Strategy 1.** Create a promotional “Marketing Kit” for staff, board and volunteers to use to engage new and existing constituents.

### **Tactics**

1. Inventory, improve, update and create new print and digital marketing materials (including the documents that demonstrate the unique mission and values of FHS).
2. Create a modern short film/video promoting the FHS work and history.
3. Develop and distribute a biennial financial and programmatic report.
4. Review demographic information of members and donors to inform our marketing strategy.
5. Pilot the creation of an inexpensive two-sided FHS informational brochure (rack card) to be distributed to State and National park, Visitor Centers, etc.
6. Create a marketing campaign around the new archive space as a crucial resource for the study of forest history, the forest industry, and conservation.
7. Create a network distribution plan for FHS promotional materials that supports enhanced engagement.

**Strategy 2.** Deepen Understanding of and Engage with Current and Prospective Members and Stakeholders.

### **Tactics**

1. Develop and implement survey tools to determine what FHS members, supporters, and audiences using FHS information are interested in, how they prefer to receive information, and what FHS programs they value. Use historic information, case assessment, program analytics, and staff knowledge, to make cost-effective informed program decisions.
2. Identify products, services, and programs which have the broadest reach and maintain/strengthen their delivery. Support a range of cost-effective services that reach the diversity of audiences.
3. Create and activate a plan, including communication channels, to increase engagement in priority constituent groups aimed to meet their interests.
4. Increase the number of virtual and in-person engagement activities, such as lectures, expert presentations and attendance at affiliate professional and trade meetings and conferences.
5. Advance social media strategy to increase visibility, use of FHS content, and convert users to supporters.
6. Pending resources, publish *Forest History Today* 2 to 4 times, per year.

**Strategy 3.** Enhance collaborations with colleges, universities, libraries, scholars and researchers.

**Tactics**

1. Collaborate with universities and research centers to establish/partner in internships programs and establish student opportunities to increase library/archive support and create new content in digital exhibits. Identify individuals in forestry, history, and research center programs to champion collaborations. Consider inclusivity options.
2. Increase outreach and seek collaboration with forestry/university libraries.
3. Cultivate a closer relationship with the National Humanities Center with respect to their residential fellowships and other programs.
4. FHS staff to participate as adjunct faculty where appropriate.
5. Evaluate opportunities to develop and market forest history related modules for college classrooms.
6. Develop short Master's level research project proposals and submit them to universities with MF and MEM programs (e.g., Yale, MSU, etc.) to extend college-level collaborations.
7. Develop marketing materials for university programs, libraries, and research centers. Publicize opportunities as appropriate on H-Environment and student gatherings at professional conferences.

**Strategy 4.** Meet and engage with local Durham organizations to foster new collaborations, including diverse cultural groups.

**Tactics**

1. Consider opportunities available with the Diversity & Equity in Environmental Programs (Deep) collaborative and Durham Environmental Coalition that include local community, regional, and aligned organizations.
2. Expand relationships with diverse cultural groups related to forest history (Native American tribes; Heirs program, Hayti Heritage Center).
3. Continue to schedule open houses at the new headquarters with targeted groups.
4. Join the Downtown Durham Rotary Club.
5. Develop youth programs for volunteerism and local community forest and conservation projects.

## **Strategy 5.** Expand International Involvement & Relationships

### **Tactics**

1. Attend meetings of international societies and networks (IUFRO, ISTF, ICEHO, ESEH, NiCHE, SOLCHA, etc.). Take part in research committees and consider officer roles.
2. Provide FHS news and updates to newsletters, list serves, web sites, etc.
3. Offer to host international meetings such as the World Congress in Environmental History and regional IUFRO meetings.
4. Seek funding for international involvement through grants, endowments and other funding sources to attend meetings of international societies and networks.

## **Strategy 6.** Seek out and expand relationships with diverse allied cultural groups.

### **Tactics:**

1. Identify, contact, and assist local and regional diversity groups such as the Maxville Heritage Interpretive Center.
2. Maintain contact with and attend meetings of the Intertribal Timber Council. Seek out tribal presence on the FHS Board.
3. Become knowledgeable and assist where feasible with the Heirs property program.
4. Actively pursue grants & contracts where the FHS core mission overlaps with DEI issues (e.g. Land Trust Alliance).

## **Strategy 7.** Strengthen relationships with primary allied organizations.

### **Tactics**

1. Position FHS as a center for vital conversations. Foster a series of initiatives and events (conferences, lectures, colloquia, Chautauqua, gatherings) around environmental themes and concerns where there is overlap with a historical context.
2. Create relationships with state and local forest history organizations and museums as well as with state forestry associations in the US; with provincial forest history organizations in Canada; and, globally, with such potential affiliates as the European Society for Environmental History and the International Consortium of Environmental History Organizations.
3. Identify strategic meetings to attend periodically such as the Who Will Own the Forest, Timberland Investment Conference, Sustainable Forestry Initiative, National Association of State Foresters, Association of Consulting Foresters, Forest Landowners Association, and the Tree farm annual meeting, among others.
4. Inform the forest and conservation community of the need to preserve forest history and FHS capacity to accept collections.

5. Explore and expand joint programming efforts with the American Society for Environmental History.
6. Invite guest bloggers to Peeling Back the Bark
7. Exhibit and present periodically at forest related meetings.
8. Create a national and adequately funded Oral History Program to serve the needs of engaging FHS audiences.
9. Actively position FHS's HQ in Durham as a location for regional and national meetings of allied organizations.
10. Ensure that FHS has a presence with major environmental education organizations, attending conferences and events by the National Association of Interpretation (NAI), the North American Association for Environmental Education.
11. Contact Society of American Foresters to 1) tap into their centennial celebration work; and 2) assist with and preserve their oral history accumulation.
12. Reach out to state forestry and forest industry advocacy organizations – WFIC, OFIC, CFA, MWPA, etc.