

Canopy Strategic Plan Fiscal Years 2009 – 2011

Executive Summary

A. Introduction

This plan has been developed to identify some of the key issues facing Canopy in the next three years and to address approaches for arriving at the desired outcomes. It is not intended to present a comprehensive statement of all tasks and programs performed by the organization – these activities are tracked and managed through a control and schedule system developed and used by the Executive Director. Rather, this document highlights those special issues that have been identified as critical to the long-term success and further development of the organization.

B. Mission Statement

Because we believe trees are a critical element of a livable, sustainable urban environment, Canopy's mission is to educate, inspire, and engage residents, businesses, and government agencies to protect and enhance local urban forests.

As an adjunct to the mission statement, Canopy will use the tag line "Healthy Trees, Healthy Communities" in promotional literature.

C. Core Values

Canopy has a set of principles and values that are integral to the work we do and that are essential to our efforts to always be a respected and professional organization. These values include emphasizing the need to:

- Use educational means and hands-on experiences to convey the importance and benefits of a healthy urban forest
- Maintain a highly competent staff and board of directors to effectively conduct the business of the organization
- Value and recognize the contributions of staff, board and the large base of volunteers necessary for a successful organization
- Make informed decisions using the latest in arboriculture science
- Work cooperatively with public, private, and other non-profit agencies in achieving desired goals
- Share our experiences and knowledge with other urban forestry groups

D. Vision

Our vision for the future is that:

- Palo Alto and neighboring communities will have a continually replenished, healthy urban forest
- Residents will both recognize the value of the urban forest and enthusiastically support Canopy's efforts through donations and volunteer efforts

- Canopy will make a significant contribution to maintaining and enhancing local urban forests through advocacy and hands-on efforts
- Canopy will contribute to community building through new and replacement tree plantings; care for newly planted and mature trees; and educating and encouraging residents to support and appreciate tree-related activities
- Canopy will be recognized as the primary local organization that provides information and education of tree-related topics through consistent and highly visible outreach to the community
- Local communities will have up-to-date tree inventories and an effective urban forestry management system
- Canopy will seek partnering with like-minded organizations in surrounding communities and fostering the establishment of Canopy-like organizations where they don't exist

Partnerships between Canopy, local and state government agencies, residents, businesses, and schools will help achieve this vision.

In order to accomplish this vision, we believe that:

- Canopy must first sustain its core commitment to Palo Alto working in partnership with the City and other allied organizations
- As Canopy undertakes any geographic expansion, it will do so only if the potential exists for strong collaborative partnerships with clear understanding of the responsibilities of all collaborators and significant potential for sustainability of effort once Canopy completes its commitments
- Sufficient resources must also be available so that Canopy does not find itself stretched beyond its own capacity to sustain ongoing commitments in a quality manner
- Canopy must strengthen its Board of Directors, volunteer corps, and financial resources, with an emphasis on unrestricted funding to provide programming flexibility and organizational capacity-building so that it can invest in attracting and retaining talented staff and continue to provide high quality work in the community
- Canopy will build increased capacity to track results and costs of its work
- Canopy must also develop increased understanding and support in the community for the variety of services/programming it provides

E. Strategic Goals, Objectives, Action Plans for Fiscal Years 2009 – 2011

1. Continue core services in the City of Palo Alto

Goal: Ensure the continuation and successful implementation of Canopy's contract with the City of Palo Alto. This is our largest contract and contractual obligations are spelled out in the Scope of Services, a document that is reviewed and modified annually.

2. Build organizational strength and capacity

Goal: Build a Board that will govern and support the organization, develop a strong volunteer base, expand staff as resources become available, improve record keeping and documentation capacity, and identify office space and equipment needs.

3. Develop three-year financial plan that links and fully resources our Strategic Plan

Goal: Develop a financial “roadmap” that shows how the organization: a) increases unrestricted funding for ongoing and core Canopy efforts, b) targets grant funding to specific projects, c) identifies a sustainable revenue mix that includes contracts, unrestricted funds, grant funding, membership, event revenues, and explores fee-for-service opportunities, d) doubles membership, e) sustains level of reserves.

4. Continue to provide Urban Forestry support to East Palo Alto

Goal: Phase out of Canopy’s urban forestry leadership role in East Palo Alto while at the same time working to build the capabilities of the EPA Tree Initiative group and the City of EPA infrastructure; completing tasks associated with our initial planting efforts; and assisting with future tree-related activities in East Palo Alto.

5. Pursue partnerships with adjacent communities as meet our criteria for compensation for services.

Goal: Provide our services to local governments and their residents, as opportunities permit.

6. Streamline Canopy’s message and distribute to a wider audience.

Goal: Create a campaign to provide a clearer message to the community about urban forestry, the benefits trees bring to a community, and what Canopy does. A population with a better understanding of all three points will strengthen both our urban forest and the organization.