

Harnessing the Passion of the Western Chapter through Strategic Planning

Kevin Martlage



When I was contacted by Rose Epperson in the Spring of 2019 to help the chapter operationalize their strategic plan and eventually develop the current one, I jumped at the chance to help as much as I possibly could. Rose has been a mentor of mine since we first met in 2016 and I have always held both her and the Western

Chapter in the highest regard as they helped to integrate me into the world of arboriculture while I was at ISA. If I could help facilitate the development of the chapter strategic plan so that they could continue to help others, I was all in. I was extremely honored to help and truly appreciate the trust of Rose, the board, and the chapter in having me guide them through this very important process. Additionally, I am excited to write this short article about the process we followed while helping to introduce you to the plan and the great work the board accomplished over the last 3 months.

One of the joys of owning my own consulting firm is the opportunity to work with so many great friends, colleagues, individuals, and organizations around the country. When I left ISA as the Director of Credentialing in 2018, I was certainly stepping away from an industry I had grown to love and a team that was second to none of any I had worked with over my 25-year career. While this was difficult to process at the time, it allowed me to step back, assess my options and strategically plan my future. The uncertainty of stepping away from a job that I absolutely loved, while being disconnected from so many colleagues I had met around the world, was a hurdle that I was not looking forward to jumping over. However, by approaching that hurdle with a long term, infinite outlook it allowed me to see through the trees and understand the vast opportunity of the entire forest. If I had simply focused on

the hurdle in front of me instead of the opportunity that presented itself once over it, I would still be looking for that 'step ladder' that would allow me to tackle that next step. By looking past that hurdle strategically and infinitely, I am now able to help so many great organizations understand how they too can make an impact on what they are most passionate about.

The process of visualizing the future, understanding the hurdles but not focusing on them, and developing a sustainable plan to make an impact is the basis of the strategic planning process we just completed with the Western Chapter Board. The process we followed was simple, but effective, in helping the chapter understand what is truly possible. The biggest hurdle we faced in the development of the strategic plan is of course the current COVID-19 pandemic. While the chapter has been very effective in continuing to provide its member benefits in the face of the pandemic, it was important for the Board to assess how they have done in terms of still getting things accomplished. To achieve that goal, we produced a survey which was sent to the board and the committee chairs to get their thoughts. The feedback we received was helpful as we developed our plan and began to look at how we will operationalize that plan over the next 3 years.

To effectively develop a sustainable and achievable strategic plan, I feel that it is important to begin with looking at how you have done as an organization to that point. It is no secret that the Western Chapter is one of the highest performing chapters in the ISA family, so we had to look critically at what has been achieved and what was still in progress from the previous 3 years. Event participation grew, certification numbers remained steady, TRAQ participation continued to be great, and the chapter did a great job of pivoting offerings to a virtual model even in the face of the pandemic. Therefore, we had to focus on what else was possible as you continue to enhance and sustain what you have already achieved.

Through the facilitation of numerous virtual workshops, we were able to validate the purpose of the organization, while also identifying four strate-

gic goals we wanted to impact over the next three years. Leadership, Membership, Professional Development, and Marketing/Public Relations were the categories that were identified with the following descriptions of each:

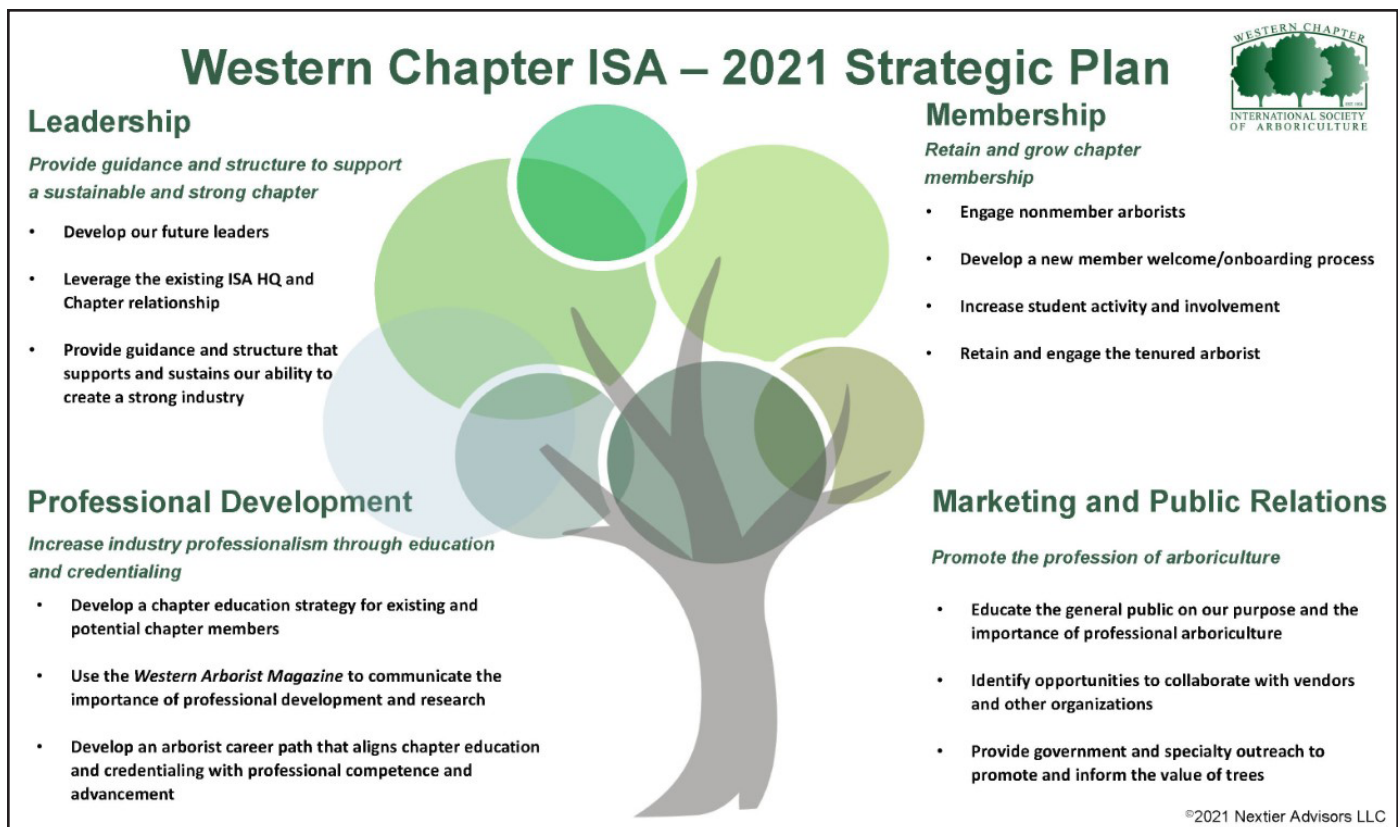
- Leadership – Provide guidance and structure to support a sustainable and strong chapter.
- Membership – Retain and grow chapter membership.
- Professional Development – Increase industry professionalism through education and credentialing.
- Marketing and Public Relations – Promote the profession of arboriculture.

Through our process it was decided that the five strategic categories of the previous plan would be revised and streamlined into four categories with 'Education & Training' and 'Credentialing' being combined into a new category called 'Professional Development'. This would allow for a more efficient and streamlined approach to these two very important aspects of the chapter. In addition, 'Governance' was adjusted to 'Leadership' to illustrate its importance while enhancing the strategic goal of the chapter to develop the next generation of chapter board members and volunteers. This enhanced focus on

both current and future leadership development will help to ensure a sustainable and effective framework designed to support the impact the chapter will have on generations well into the future.

The next step in the process was to develop the strategic initiatives that would be carried out to drive the overall strategic goals. Each of the four strategic categories were reviewed by members of the strategic planning committee to identify three key initiatives that would be important for the chapter to operationalize over the next three years. This part of the process involved an interactive virtual session where the group discussed and confirmed the initiatives under each of the four categories. The group was encouraged to keep a very high level and long-term mindset regarding the initiatives and the overall goals. They did a great job of staying at a high level with the understanding that the various committee champions would be working on the specific operational plan once this part of the process had been completed.

The final step in the strategic planning process was to have the team determine some next steps or the 'how' for each of the categories. This part of the process identified steps they developed for the chapter to be successful in driving the initiatives and ultimately the four strategic goals. Following



this part of the process I met with Board President, Jimi Scheid and Executive Director Rose Epperson to identify the champions and committees for each of the initiatives. This process allowed us to set up the operational plan development stage which would be carried out by the Board liaisons, committee chairs, and the champions over the next three years. This final phase will include the champions working with their committees to determining potential collaboration partners, anticipated hurdles, Key Performance Indicators (KPIs), next steps, and most importantly anticipated due dates.

Probably the most important part of the strategic planning process is keeping the plan alive and making it happen. By determining champions for each, it will be providing an efficient framework for the champions and staff to follow up and provide updates to the board and membership as the plan continues to be set into motion.

Strategic planning can be accomplished using many different processes and tactics. Ultimately, it is the work of the board, their passion for what

makes you unique, and the history and legacy of the organization that will allow you to achieve even greater things. Facilitating the process and working with a group of individuals who are passionate about your organizational goals makes working with the Western Chapter that much more rewarding for me personally.

The great poet Henry David Thoreau once wrote, "It is not what you look at that matters, it is what you see". Your plan is certainly written for what you see and have visualized as impactful goals for the next three years. I wish you nothing but the best as you continue to make an impact on the industry and your current and future membership. I am looking forward to continuing to build the relationship with the chapter as you exceed your plan over the next three years.

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