

# **Strategic Plan 2016-2018**

Final Draft, April 2016

## **Mission Statement:**

The Herb Society of America is dedicated to promoting the knowledge, use and delight of herbs through educational programs, research, and sharing the knowledge of its members with the community.

## **Vision Statement:**

It is the vision of The Herb Society of America to be recognized globally as the premier resource for herbal education and information fostering the preservation, cultivation, use and delight of herbs.

## **Values:**

The Herb Society of America believes in:

- Providing opportunities for education about herbs
- Providing opportunities for networking and the exchange of information and experiences
- Promoting a respect for our global environment and the preservation of herbs
- Fostering research to expand the history and understanding of herbs

## **Goal 1: Grow Membership and Strengthen Relationship with Current Members**

A strong membership base is essential for the operations and financial viability of The Society. The intent of the membership goal is to achieve transformational growth that will attract and retain members from the widest variety of people interested in the study of herbs. In order to achieve this goal, The Herb Society of America must become more innovative in identifying and meeting the expectations of the current public, utilizing appropriate technological and market trends.

### **1.1 Increase membership growth**

- 1.1.1 Communicate value of membership and benefits at every opportunity in publications, brochures, and electronic media including but not limited to the website, Facebook, Pinterest, and Twitter.
  - 1.1.1.1 Ensure all brochures, handouts are reviewed annually and updated as needed with coordination between responsible board chair and HSA staff.
  - 1.1.1.2 Emphasize volunteerism, the charitable and philanthropic value of membership, the concept of “giving back” to the next generation and sharing gifts of knowledge and friendship.
- 1.1.2 Explore methods and develop procedures to retain and increase active membership for a net gain in membership of 10% for FY17 and FY 18.
  - 1.1.2.1 District membership delegates will continue to build membership within the districts through personal contact to inactive members and to welcome new members following receipt of membership reports.

- 1.1.3 Evaluate and update HQ membership renewal and retention plans with executive director, membership chair, and headquarters membership staff to increase retention by net 10% over FY17 and 18.
- 1.1.4 Headquarters membership staff will conduct exit interviews with non-renewing members and collect statistics to report trends to the membership chair and board.
- 1.1.5 Develop methods to offer opportunities and avenues to recognize members and member's accomplishments.
  - 1.1.5.1 Announce achievements and news in the "What's New" section of the website.
- 1.1.6 Research recruiting possibilities through retiree associations, including but not limited to AARP, Retired Teacher's Associations, or other national retiree organizations.
- 1.1.7 Explore additional membership options, including but not limited to tiered memberships, youth, legacy, and trial memberships.
  - 1.1.7.1 Assign ad hoc committee with membership chair and develop plan, recommendations or proposal for addition options.
- 1.1.8 Improve business membership benefit plan in coordination with membership chair and executive director with the goal of increasing business membership by a minimum of 10% net gain annually.
  - 1.1.8.1 Provide a monthly feature area on the HSA website for HSA business members.
- 1.2 Develop a strong contributing membership base.
  - 1.2.1 Identify, recruit, and encourage HSA members to contribute to the blog, *The Herbarist*, newsletters, webinars, guides, and other publications.
    - 1.2.1.1 Maintain master list of authors and contributors with topics.
- 1.3 Develop additional membership benefits, while maintaining and strengthening existing benefits.
  - 1.3.1 Identify new membership benefits to HSA members that would be valued and utilized.
  - 1.3.2 Develop electronic communications for use by HSA members to communicate, including but not limited to E-cards, Anniversary Cards, and Welcome Cards.
  - 1.3.3 Ensure member benefits are refreshed periodically and discount codes are updated for posting early January annually.
  - 1.3.4 Explore and develop a mentoring program or model for new members
- 1.4 Improve communications with current membership including but not limited to life members, members at large and unit members.
  - 1.4.1 Provide *Unit Connections* e-newsletters to unit chairs quarterly.
  - 1.4.2 Explore a quarterly e-newsletter for HSA Members at Large.
  - 1.4.3 Develop a method to communicate with HSA Life Members.
  - 1.4.4 Explore and establish methods for committees, unit chairs, and members at large to facilitate and improve communication between each other.
- 1.5 Improve resources available to unit members and unit officers.

- 1.5.1 Review the Unit Resource Handbook biennially and update as needed.
  - 1.5.1.2 Develop “Being a Mentor” guidelines for the Unit Resource Handbook.
- 1.5.2 Add a Unit Chair Welcome section to the HSA website.
- 1.5.3 Encourage units to submit Unit Profiles updates, to monitor unit chair information and to update HSA headquarters and district membership delegates when changes occur.
- 1.5.4 Develop a publicity/event/display table kit for use by members or units when they have a table at an event, sale, seminar, Flower and Garden shows.
  - 1.5.4.1 Develop methods to download and print posters, display material, brochures for events.
- 1.6 Utilize electronic and social media to reach a diverse audience and enhance membership.
  - 1.6.1 Redesigned website with launch in 2016.
  - 1.6.2 Collect and analyze statistical data from all sources of electronic media to develop trends.
  - 1.6.3 Develop HSA video’s and “How To’s”.
    - 1.6.3.1 Develop partnerships with like organizations to share herb related educational video or media files.

## **Goal 2: Promote and Strengthen Educational Programs and Resources**

The educational products and services offered by HSA are vital to support membership development and value, as well as, defining, creating, and influencing the external perceptions of The Society. The Society needs to develop and maintain programs that attract and retain members and organizations by recognizing the diversity of member interests and backgrounds. Web-based programs offer opportunities to reach new members by delivering products and services in a cost effective manner and by overcoming the distance between HSA (the provider) and the user.

- 2.1 GreenBridges™
  - 2.1.1. Develop and implement a marketing strategy to increase participation by 25% annually.
    - 2.1.1.1 Strategies include but are not limited to use of trademark, sharing of photos and garden stories, list of plants by zone (virtual gardens) and exploring relationship with like-minded organizations.
- 2.2 Notable Native Herb Conservation
  - 2.2.1 Develop a marketing strategy to increase program recognition in order to expand as an HSA signature program.
  - 2.2.2 Select Notable Native Herb three years in advance.
  - 2.2.3 Develop marketing strategies showcasing HSA’s environmental support, Notable Native Herb, develop educational materials for the NNH, as well as develop partnerships with like-minded organizations, HSA business members, nurseries and plant growers.
  - 2.2.4 Review program criteria, evaluate and update.
- 2.3 Promising Plants
  - 2.3.1 Evaluate and update program criteria.

- 2.3.1.1 Review Operating Manual documents with committee chair.
- 2.3.2 Select a limited number of Promising Plants for a three-year time period to provide educational materials, partnership and trialing opportunities.
  - 2.3.2.1 Ensure a wide variety of growing zones.
    - 2.3.2.1.1 Explore option to grow in recognized trial gardens in each region.
- 2.3.3 Improve recognition of Promising Plants with plant organizations, botanical gardeners, nursery growers and others in the trade.
- 2.3.4 Collect Promising Plants evaluations received to date, review, present information and program recommendation.
- 2.4 Webinars
  - 2.4.1 Offer high quality webinar presentations on a variety of topics.
    - 2.4.1.1 Develop a strategy to increase attendance at the HSA webinars.
  - 2.4.2 Provide some webinar programs in the evening to offer an opportunity to members who work.
  - 2.4.3 Develop strategies to produce income from archived webinars.
- 2.5 *The Herbarist*
  - 2.5.1 Explore options for delivery to a broader audience beyond HSA membership.
  - 2.5.2 Maintain a list of potential authors.
    - 2.5.2.1 Review, evaluate and update author submission guidelines and forms, contracts by spring 2017.
  - 2.5.3 Develop and establish themes for next three issues FY 17, FY 18 and FY19 and communicate theme at least a year in advance.
- 2.6 HSA Headquarters Resources
  - 2.6.1 Promote HSA Headquarters (Vineyard House) as a regional and member resource.
    - 2.6.1.1 Invite public gardening or media groups to tour (or video) headquarters historic stone building and educational herb beds around headquarters.
  - 2.6.2 Develop, promote, and expand the availability of PowerPoint programs for use by HSA members for educational programs.
  - 2.6.3 Collect digital images or photos and categorize for use by HSA members and HSA staff.
    - 2.6.3.1 Communicate photo size, format requirements, and desired images.
  - 2.6.4 Increase awareness of HSA archives and the historical value of rare collections.
    - 2.6.4.1 HSA Librarian to write articles highlighting the rare and historical collection.
  - 2.6.5 Utilize headquarters gardens to support HSA programs, e.g. Promising Plants, Notable Native Herb, and GreenBridges™.
    - 2.6.5.1 Zone appropriate plants from each program will be planted.
  - 2.6.6 Increase public and member awareness of the library as a resource for local research and member research.
    - 2.6.6.1 Improve online searchable information and how to access.
    - 2.6.6.2 Explore feasibility and develop members only library sessions.
    - 2.6.6.3 Develop timelines and goals to complete the updated HSA history book.

- 2.6.7 Offer educational programs and outreach to the local community.
  - 2.6.7.1 Vary staffing hours and promote being open during large events at Holden Arboretum.
  - 2.6.7.2 Share requests for speaking opportunities with local unit and local members at large.
- 2.7 Children's Gardening
  - 2.7.1 Develop an herb related coloring book and /or activity for children (define a starting age group).
  - 2.7.2 Explore feasibility of developing HSA branded growing "kits", with instructions, evaluation forms/tables, seeds, and gift card or coupon for soil mix and pots to use by members working with school age children or to use for Samull Grant awards.
- 2.8 Website
  - 2.8.1 Utilize to provide educational materials to HSA members and to the public.
  - 2.8.2 Enhance information available on website regarding herbs for health and well-being.
  - 2.8.3 Expand and explore connections with other organization whose mission aligns with and whose focus is herbs for health and well-being.
- 2.9 Educational Conference
  - 2.9.1 Evaluate current program structure and develop strategies to increase educational opportunities during the conference.
  - 2.9.2 Review and evaluate Educational Conference post survey results and incorporate changes as appropriate.
  - 2.9.3 Explore methods to electronically deliver the Annual Meeting of Members.
- 2.10 Grants
  - 2.10.1 Increase visibility on HSA website.
  - 2.10.2 Review, evaluate, and update as needed grant guidelines and applications for improved clarity in project guidelines, publication, and reporting requirements for grant submissions.
    - 2.10.2.1 Requirement for final reports to be published in *The Herbarist* and HSA newsletters.
    - 2.10.2.2 Review and update materials provided to Samull Grant Award recipients.
- 2.11 National Herb Garden
  - 2.11.1 Increase member and public awareness and education of the NHG history and programs.
  - 2.11.2 Provide video and/or image of "Under the Arbor" series for the HSA website and/or on the HSA YouTube page.
  - 2.11.2 Maintain HSA membership support of the NHG.
- 2.12 Gardens of HSA
  - 2.12.1 Collect Gardens of HSA information for posting on HSA website.
    - 2.12.1.1 Expand program to include member at large maintained gardens.
  - 2.12.2 Explore and develop expanded education through garden guides using electronic media, e-books, apps and/or QR codes.

- 2.13 Evaluate HSA level of participation in National HerbDay.
- 2.14 Explore partnerships with national and like-minded organizations for expanded educational opportunities for HSA members.

### **GOAL 3: Strengthen and Grow Financial, Technical and Human Resources**

The HSA Board of Directors is committed to ensuring that The Society adapts rapidly and effectively to change in the technical and operating environment. The Society will ensure that the board, staff and members are focused on achieving the strategic goals, maintaining sound financial stewardship, and engaging in capacity building and fund raising efforts.

- 3.1 Increase financial support in order to strengthen the capability of the organization to meet mission goals.
  - 3.1.1 Increase revenues by a total of 25% over the next two fiscal years (FY17 & FY18) with a goal of \$17,500 increase.
  - 3.1.2 Increase donation totals by 15% over the fiscal years (FY17 & FY18) with a goal of \$8,500 increase.
  - 3.1.3 Develop targeted appeal letters to HSA units and identified members for donations.
  - 3.1.4 Explore potential revenue streams.
  - 3.1.5 Establish a monthly giving program.
  - 3.1.6 Update HSA wish list on website quarterly and include in HSA newsletters
  - 3.1.7 Increase sponsorships for the Educational Conference 2017 and the Annual Meeting of Members 2018.
    - 3.1.7.1 Develop a list of sponsorship opportunities and benefits.
  - 3.1.8 Increase advertising in the *The Herbarist* 2016 by 20% from FY2015.
    - 3.1.8.1 Develop a list of potential advertisers' and sponsors'.
    - 3.1.8.2 Develop a list of advertising and sponsorship benefits.
    - 3.1.8.3 Explore e-books and other forms of electronic distribution of issues of *The Herbarist*.
- 3.2 Promote Giving Opportunities
  - 3.2.1 Highlight Founders' Circle giving options during district events, in HSA newsletter articles and through personal conversations.
    - 3.2.1.1 Offer training for asking techniques, for approaching donors, develop sales/elevator speech for giving.
  - 3.2.2 Include articles in HSA newsletters promoting giving programs including but not limited to; Herbal Pathways, In Memory and/or In Honor gifts, Amazon Smile, Good Search and Good Shop.
  - 3.2.3 Promote Giving Tuesday, Nov 29, 2016.
- 3.3 Garden Gallery
  - 3.3.1 Develop and enhance herb related products offered in the Garden Gallery, online and at HSA events and unit events.
  - 3.3.2 Increase profit margins on Garden Gallery items.
- 3.4 Decrease operating costs.
  - 3.4.1 Reduce operating expenses for FY17 and FY18 by 10%.

- 3.4.2 Explore and develop options to reduce board expenses.
  - 3.4.2.1 Develop options to reduce board expense for face to face meeting FY17 and FY18.
  - 3.4.2.2 Explore options to reduce the size of the board.
- 3.5 Marketing and fund raising
  - 3.5.1 Develop and establish a case statement, impact statement, and elevator speech for soliciting membership and contributions.
  - 3.5.2 Develop and monitor a five (5) year marketing plan in coordination with the development chair and executive director.
  - 3.5.3 Update and monitor the current fund raising plan in coordination with the development chair and executive director.
  - 3.5.4 Develop relationships and partnerships with similar plant societies and like-minded organizations.
    - 3.5.4.1 Continue to develop participation with Coalition of American Plant Societies (CAPS) sharing potential program information and highlights from CAPS meeting with board members.
- 3.6 Improve board training and development.
  - 3.6.1 Include board training activities at every board meeting and provide board members with available board nonprofit training opportunities.
  - 3.6.2 Provide information on gardening trends for future program development.
- 3.7 Evaluate investment management company options in coordination with Finance and Operations Committee and executive director.
- 3.8 Ensure the maintenance and upkeep of the HSA Headquarters (Vineyard House)..
  - 3.8.1 Develop a plan to ensure that headquarters technology and equipment needs are identified and updated as needed.
- 3.9 Develop succession plan guidelines with the executive director and the board of directors to be included in the HSA Operating Manual.
- 3.10 Provide HSA staff with nonprofit training and education opportunities.
  - 3.10.1 Identify areas of training needs, and identify available low-cost opportunities.