



TREE Fund Strategic Plan 2025–2028

Mission

TREE Fund supports scientific discovery and dissemination of new knowledge in arboriculture and urban forestry.

Vision

To be a leading force in advancing tree research and education by fostering financial resilience, expanding our audience, and becoming a funding hub for arboricultural knowledge and innovation.

Pillar 1: Financial Sustainability and Development

- Grow the **endowment to \$8 million** by 2028.
- Achieve **operational sustainability** through diversified revenue streams.
- Expand **donor engagement** and planned giving.

Pillar 2: Research and Education

- Host or co-host a major **Research Summit/Symposium in 2028**.
- Produce a comprehensive **Impact Report**.
- Conduct an **Industry Needs Assessment**.

Pillar 3: Communications and Outreach

- **Expand our audience** while keeping core audience engaged.
- **Increase visibility and emotional resonance** of TREE Fund's messaging.
- **Build strategic alliances** with public-facing organizations.



TREE Fund Strategic Plan 2025–2028

Detailed plan for internal use

Pillar 1: Financial Sustainability and Development

Lead Committees: Audit & Finance, Development

Objectives

- Grow the endowment to **\$8 million** by 2028.
- Achieve operational sustainability through diversified revenue streams.
- Expand donor engagement and planned giving.

Key Actions

- Increase endowment by **\$1M annually**.
- Recruit **25 new Heritage Oaks members**.
- Strengthen annual giving campaigns.
- Engage corporate sponsors, ISA chapters, and individuals.
- Reinvigorate Heritage Oaks with targeted marketing.
- Revisit Tour des Trees to ensure sustainability of event model
- Partner with green organizations and arboretums.
- Explore monetization of webinars and speaker engagements.

Metrics

- Annual endowment growth.
- Number of new Heritage Oaks members.
- Annual fundraising totals by source.
- Number of new partnerships and co-branded initiatives.

Pillar 2: Research and Education

Lead Committee: Research & Education (to be formed)

Objectives

- Host or co-host a major **Research Summit/Symposium in 2028**.
- Produce a comprehensive **Impact Report**.
- Conduct an **Industry Needs Assessment**.

Key Actions

- Form Research & Education Committee.

- Launch planning for 2028 Symposium.
- Review and update the 2018 Impact Study.
- Define and execute ROI metrics for TREE Fund-supported research.
- Develop educational materials for Land Grant universities.
- Expand webinar reach and possible monetization.

Metrics

- Completion and dissemination of the Impact Report.
- Symposium attendance and sponsorship.
- Number of peer-reviewed publications and citations.
- Webinar engagement metrics.

Pillar 3: Communications and Outreach

Lead Committees: Liaisons, Communications

Objectives

- Reach out beyond the tree care industry (while keeping core audiences engaged).
- Increase visibility and emotional resonance of TREE Fund's messaging.
- Build strategic alliances with public-facing organizations.

Key Actions

- Integrate messaging with green organizations (e.g., UCFS, SAF, SPI) while establishing clear brand differentiation.
- Collaborate with arboretums and public gardens.
- Develop emotionally compelling marketing campaigns.
- Create a database of contacts at Land Grant universities.
- Encourage broader participation in webinars and programs.
- Improve outreach during conferences and all in-person TREE Fund-sponsored events, including PPT of grant & scholarship recipients, research in action, etc.
- Launch Speakers Bureau – help chapters connect to researchers as conference presenters

Metrics

- Number of new partnerships.
- Growth in public engagement.
- Survey-based brand awareness and emotional impact.
- Number of educational institutions engaged.

Capstone: Executive and Governance Oversight

Lead Committee: Executive & Governance

Objectives

- Keep plan on course while adapting to emerging opportunities
- Re-examine and potentially revise TREE Fund's mission statement to reflect expanded goals and audiences.

Key Actions

- Check in with committees on a regular basis
- Conduct a mission review and stakeholder survey.
- Benchmark against peer organizations.
- Draft and approve revised mission statement (if needed).
- Communicate changes to all stakeholders.

Metrics

- Goals scorecard/dashboard
- Completion of mission review process.
- Stakeholder feedback scores.
- Board approval of revised mission.
- Integration of new mission into communications and branding.

Implementation Timeline by Committee [separate document]