

## Joint Strategic Plan – Long Version

2020-2022

### for The Association of Specialty Cut Flower Growers (the Association) and the Specialty Cut Flower Growers Research Foundation (the Foundation)

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## I. Developing a Joint Strategic Plan for the Association and the Foundation

### A. Summary and Overview

One of the primary responsibilities of a board of directors is to oversee the overall direction of the organization and ensure that the organization's efforts are effective in accomplishing the organization's mission. This is typically done in a written strategic plan covering a three- to five-year period. There are variations on how strategic plans are developed and presented, but the basic process is to examine the external landscape in which the organization operates, evaluate the organization's current internal capacities, and then set the direction in terms of vision, mission, strategy, programs, and metrics by which to measure outcomes or progress towards accomplishing the mission.

The organizations began strategic planning in June of 2019 with the goal of approving a strategic plan at the November board meeting. Staff contracted with a strategic planner and the Board designated a Strategic Planning Steering Committee (SPSC) to work with staff and the strategic planner. Staff, the strategic planner and the SPSC jointly are referred to as the planning committee. Early in the process the planning committee decided that since the Foundation and the Association are jointly managed and work together to serve members it would be best to develop a joint strategic plan and leave the details of which entity would ultimately take legal and financial responsibility for which activities to the implementation plan. The implementation plan will be developed late in the process of developing the strategic plan and will serve to guide management in specific next steps needed to conform the organization's operations to the guidance given in the strategic plan.

The next step in planning was a survey sent to members. The survey was intended to give the planning committee information about member opinions and the organization's strengths, weaknesses, and opportunities relative to member opinions and other organizations providing similar services. While the survey was out for member response the strategic planner reviewed various organizational documents and interviewed staff and board members to evaluate the organization's internal capacities. The strategic planner worked with staff and the Strategic Planning Steering Committee to analyze survey responses and draft this background document. This document will go out for review and feedback from the full board and a select group of members, and then the strategic planner will draft the final draft strategic plan for final board approval.

This background document begins with a summary of the findings from the survey and the review of internal documents and capacities. The next section discusses existing language and updated options for communicating the organization's vision, and mission. The following section discusses organizational strategies for accomplishing the mission. Currently strategies are implied by the programs of the organization. One of the outcomes of this strategic planning process will be to make the organization's

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strategies for accomplishing its mission explicit so that programs can be shaped according to the direction set by the board through the strategic plan. The last section of this document begins to discuss how programs should be defined and metrics by which programs might be evaluated.

The strategic plan is intended to set the high-level overall strategic direction of the organization. It focuses on what the organization should do, the strategic way in which the organization's programs should align to the mission and with each other, and metrics by which the organization might measure success. The more specific questions of how the organization should be managed in order to fulfill its mission will be addressed in an implementation plan to be developed as a companion piece to the strategic plan.

#### B. Membership Survey and Preliminary Conclusions

Staff sent a survey to all of membership in early July. The survey closed at the end of July. Xx people responded. The survey included x questions with quantitative responses and xx questions with space for open ended comments. The strategic planner reviewed all the comments and categorized them into broad themes with short summary statements for each grouping. The rest of the planning committee reviewed all the comments and the categorization and summary statements prepared by the strategic planner.

**A detailed summary analysis of the survey questions and results is attached at Appendix A.** A few themes emerged that cut across all or most of the questions. The planning committee synthesized the findings from the survey into several broad strategic questions and likely directions for the organization represented in the outline below:

#### 1) How is the education program defined and how does it relate to the other programs?

##### a) How do we deliver education and information?

- i) The original concept was a national conference backed by regional meetings, hands-on workshops, etc. Members continue to prefer these in-person opportunities but conceded that the constraints of out-of-pocket expense plus time away from the farm made online opportunities highly desirable.
- ii) How do we serve both new and seasoned growers, and how should the mentorship program be integrated with the overall education program?
  - (1) Members were mixed in their responses to this. Seasoned growers want opportunities to take deeper dives on advanced topics and newer growers want opportunities to learn alongside more seasoned growers. Seasoned growers generally want to help newer growers but are concerned about competition, undercutting of prices, and new growers who are either not profit-oriented or not willing to do enough of their own research before seeking answers from others.
  - (2) Members had positive attitudes towards the mentorship program although they had many suggestions for how it could be improved. Members ideas about how the program

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could be improved indicate that there are opportunities to serve seasoned growers and new growers through the mentorship program, and that the mentorship program needs to include more elements non-mentorship-based education

- iii) Members have made it clear they want significantly more online learning opportunities
  - (1) Synchronous
    - (a) Live webinars with Q and A in real time
  - (2) A-synchronous
    - (a) Library of past webinars
    - (b) How-to videos
    - (c) Library of publications
      - (i) Members also value access to traditional print media resources including the magazine and books.
      - (ii) Members expressed a desire to access old information from the website and also said that the resources library on the web site needs to be properly organized so it is searchable and organized according to appropriate search terms
        - 1. Formally creating a library of all past materials and resources is a resource-intensive endeavor – we would need to consider the future benefits of making that sort of investment and likely need to relate access to the library to members, and member fees to library access.

**b) How is the education program formally evaluated? How do we measure success for our educational offerings?**

**c) Who are our partners and funders for education?**

- i) We need to stick to the mission of serving flower farmers - and work with other farming organizations for topics that are not flower-specific
- ii) There is money out there for education, but we need to partner with other organizations to get it, the environment is very competitive, and we would need to increase our internal capacity in order to take advantage of these opportunities.

**d) How does the education program tie to the membership program?**

- (1) Some educational opportunities are open to non-members
- (2) Web-based resources are only available to members
  - (a) This supports the education program and boosts the value of membership

**2) How is the research program defined and how does it relate to other programs?**

- a) Is acquiring information about pricing correctly managed as part of the research function?
- b) Is it a research function to catalog past findings?
- c) How is the research program evaluated and how do we measure success in the research program?

**3) How is the membership program defined, and how does it relate to other programs and to the Association's regional structure?**

- a) Is it our policy to grow membership or to limit it? We should not attempt to limit membership growth.

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- b) How do we want to touch our members? What is the overall outreach strategy for membership engagement?**
- i) Consider the role of technology in supplementing in-person membership connections.
- c) What do members get for their dues? What are the extras outside of membership?**
- i) How do members perceive the value of membership?
  - ii) How do we differentiate ourselves from other membership organizations?
- d) In what ways do non-members interact with the organizations?**
- i) What is our strategy for converting non-member participants in educational events to members?
  - ii) How do we state the value-proposition for membership as opposed to non-membership?
- e) Is the fee structure for members correct given our goals related to membership growth?**
- i) A few members pointed out that we are more likely to increase revenues by lowering membership fees than by raising them.
  - ii) Several members suggested tiered membership levels
  - iii) We should also consider a menu of options for membership benefits, for example a separate fee for access to an online library of print resources, and a separate library of online programs (videos, past webinars etc.) with one fee for general access and additional fees for access to synchronous programs.
- f) Why do we have regions? If we continue with a regional structure...do we re-draw regions or just re-think them?**
- i) Originally regions were to create the board. Over time the role of board members at the regional level shifted towards helping members socialize and learn from each other – this is more of a programmatic function than a traditional board member role.
  - ii) How does or should the regional structure relate to the educational program strategy?
  - iii) How does or should the regional structure relate to outreach to members and potential members?
    - (1) We need to review our outreach strategy
      - (a) Need to consider the role of in-person versus technology
      - (b) Need to reconsider everything related to the regional structure
        - (i) Note that as we re-think regions, we also need to re-think board structure.
      - (c) Need a written outreach and communications plan
        - (i) Board members responsibilities for outreach and communications need to be re-visited
- g) What is the outreach program for members? How do we keep members engaged and motivate members to become more engaged?**
- i) Significant resources are already dedicated to member-communications, but survey responses made it clear that members are not retaining information about membership program benefits and Association activities.
    - (1) How do we develop more effective outreach strategies?
    - (2) Do we need a written communications plan?

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#### C. Preliminary Conclusions From the Internal Capacity Assessment

The strategic planner administered a detailed organizational capacity assessment on the Association and the Foundation and followed up with staff interviews and reviews of critical organizational documents. The organizational capacity assessment covered the legal status of the organization, board governance capacity, revenue sources, financial, managerial, and tax accounting compliance and capacity, utilization and management of labor and contractors and compliance with applicable labor law, program management capacity including evaluation metrics, credit and cash flow, and other topics related to management, insurance, and tracking membership demographics.

The purpose of the evaluation was to gather information to inform two additional strategic questions:

- 4) Does the board have the capacity to manage significant organizational change, and if not, what additional capacities does the board need to develop?**
- 5) Do staff and current management systems have the capacity to manage and integrate significant organizational change and if not, what additional capacities does the board need to develop?**

The conclusion of the review is that the organizations have appropriate capacity to manage current operations but will need to invest in new management capacities in order to improve the effectiveness of current programs and grow new programs to serve members.

The organizations' legal structures and supporting legal documents are sufficient to support unlimited growth.

The board does not have a complete set of written procedures or a formal board training program. The organization needs to develop these capacities in order to grow and effectively manage new and existing programs.

Revenues are concentrated in membership dues and fee for service for educational programs. Historically the organization has not pursued the types of grants and contracts that require sophisticated accounting however, membership indicated some enthusiasm for the organization pursuing new revenue opportunities and it will be necessary to develop new fundraising, management and cost accounting capacities in order to take advantage of more diverse funding opportunities. Related, the organization does not currently have internal capacity to manage potential new income tax compliance issues associated with an expanded sponsorship or advertising program.

The organization is currently minimally staffed and does not have a current written human resources policy manual. There do not appear to be any issues with non-compliant contract labor. In order to

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improve program delivery and grow the organization's programs the organization will need to hire at least one or two new people. The best practice for an organization of the current size and any expanded size is to have a written human resources policy and procedures manual, usually develop with the expert guidance of an HR professional or an attorney with HR expertise.

As discussed in more detail immediately below, current programs are not well defined and are not managed under clear, distinct and strategic program management plans. Staff currently divide their time between organizational management and program management. In order to improve program delivery and grow program offerings the organization will need to hire at least one person as a dedicated program manager. A program manager would be in charge of developing clear program plans including funding strategies and evaluation metrics.

The organization has not had cash flow problems in the past and has not needed credit. If the organization takes on foundation or contract funding it may need to develop additional cash-flow management capacities and may eventually need to utilize credit as part of a cash flow management strategy.

Finally, the organization does not have detailed information on membership demographics particularly with respect to race. Membership responses to survey questions touching on racial diversity of membership suggest that members are open to efforts to increase the racial diversity of membership, but do not currently have sufficient cross-cultural competency to initiate a successful effort. The organization will need to have a plan to increase the racial diversity of membership if it wants to successfully pursue grant and contract funding. These new capacities will need to be developed through thoughtful partnerships and with guidance from experts in implementing diversity, equity and inclusion initiatives.

## II. Developing the Five Elements of the Strategic Plan

The organization has not done strategic development before and does not have a single document that states the board approved version of current language for the basic elements of a strategic plan. The following discusses the language currently in use and suggests new language to be adopted.

### 1. Vision

An organization's vision statement is a short and evocative expression intended to express the core value, or "brand promise" of the organization. Some think of the vision statement as a statement about how the world would look if the organization accomplished its mission. Some think of it as the organization's bumper-sticker slogan, or brand tagline.

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The website for the Association currently leads with the following phrases:

Educate. Unite. Support.  
Growing. Sharing. Learning

These could be considered vision statements except they lack the context of flower growers. Edited to provide that context, one suggestion for alternative phrasing is:

***Flower growers supporting each other through research, education, and community.***

Note that this vision statement does not include room for marketing support and does not suggest an outcome such as financial success but rather suggests that sharing and learning are ends in and of themselves.

This version of a vision statement is on the Summary Strategic plan and the planning committee recommends it for board adoption.

The Foundation does not have similar language expressing what might be used as a mission statement. A separate mission statement for the Foundation is not needed if it is understood that research is a method of realizing the vision and not an end in and of itself.

## 2. Mission

An organization's mission statement is a short paragraph describing the essential functions of the organization. It should state who is served, how they are served, and the intended outcome of the services. It may include a statement about the understanding of which types of actions cause which types of outcomes, sometimes called a "theory of change."

The mission statement serves as guidance for the organization's operations and is often used in public and legal documents including the federal tax return, applications for foundation grants and government awards. Officers of the organization are authorized to act in furtherance of the mission and are not authorized to act beyond the scope of the mission, therefore everything the organization does should fit within the mission statement, and the mission statement should be narrow enough to limit the organization from drifting into activities not contemplated by the board in approving the strategic plan.

Typically, a mission statement is developed as part of the original plans for incorporating an exempt organization or association, and then may from time to time be updated as part of the strategic planning process.

The Association's web site currently states:

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Our mission is to help growers produce high-quality floral material, and to foster and promote the local availability of that product.

This statement does not use the word education, though education is the primary activity of the organization. It also does not include anything about sustainability, commercial success or community, though virtually all the Association's actions express the importance of these values. Also missing in this statement is anything that would suggest the importance of helping new flower growers.

The most recent 990 states that the Association's mission is:

{To} provide information, education, and resources for the production and marketing of cut flowers. Significant activities are production of the "Cut Flower Quarterly," regional and national meetings, research, and providing networking opportunity for members to share information.

This version of a mission statement is complete, but mostly because it uses very broad language. It does not match the web site which may be confusing to potential donors. Ideally an organization has one mission statement and uses it consistently across all communications.

It is also worth noting that this version of the mission statement lists four activities, and these activities do not correspond to the information on major programs listed immediately below on the tax return, nor do they correspond to the way programs or activities are expressed on the web site or in the regular financial statements of the Association.

The original application for exemption for the Foundation filed in 2003 included the following language:

Mission Statement. The Association shall engage in a variety of activities ... to advance the education of the general public on the subjects of cultivating and harvesting specialty cut flowers.

This mission statement includes the word education, but not the word research. The subjects of education may be unduly limited to "cultivating and harvesting" which could be read to exclude economic research or business education. This statement also lacks the context of values.

The planning committee combined the two statements and re-wrote them to include both methods and values:

***Our mission is to support specialty cut flower growers by creating accessible research and educational opportunities for growers at every stage of developing financially sustainable businesses. We build community through peer-to-peer learning and***

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*mentorship. We share an interest in ecological sustainability and the pursuit of personal and financial well-being and success.*

This version of a mission statement is on the Summary Strategic plan and the planning committee recommends it for board adoption.

### 3. Values

The last part of the mission statement proposed above includes statements about the organization's values. Many organizations include a separate statement of values in their strategic plan. Values may be used to guide the organization in developing internal policies and procedures and in shaping how programs are developed and delivered. One way to think of values statements is that they are underlying agreements that would be used to guide leaders in their choices. If the organization's values are succinctly captured in a mission statement a separate statement of values is not necessarily needed. If some of the organization's values might be controversial or not fully captured by the mission statement, then it might be more important to explore values in more detail as part of strategic planning.

The membership survey included many expressions of member values including strong value placed on ecologically oriented growing techniques and distrust of corporate-sponsored research. It can be challenging and time consuming to come up with values statements, in part because once you name a few values, you are forced to consider why you would not name others. For example, it might not be difficult or controversial to express values statements related to education and science, but it may be more challenging to express values that might limit support for some agricultural practices including ecologically unsound practices and the exploitation of labor.

The planning committee recommends that the strategic plan include values statements and offers the following for the board's consideration:

- ❖ **We value education.**
- ❖ **We value ecological sustainability.**
  - Note: This implies that we prefer some practices over others.
- ❖ **We value community.**
  - Note: This implies standards of behavior, and explicit and implicit agreements about who is or is not part of the community.
- ❖ **We value diversity, whether it's growing practices, scale, ideas and opinions, geographies, nationalities, age, gender or race.**
- ❖ **We value science, particularly peer-reviewed research, and grower-led research.**
- ❖ **We value each member's pursuit of financial success or sustainability; however they may define that for themselves.**
- ❖ **We value social equity or social justice and are concerned with working conditions and wellbeing of farmers and farmworkers in the cut flower industry.**

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- Note: This implies that we regularly offer educational opportunities that touch on farmworker health and well-being, including less chemically intensive growing methods.

#### 4. Strategies and Programs

The organization's strategies and programs should clearly come from the mission statement. If the organization's mission statement does not clearly contain the key strategies the organization uses to effect change in a complex area, sometimes the strategic plan includes a section discussing the organization's theory of change, or the strategies it believes will most likely lead to success in accomplishing the mission. The strategies an organization identifies should lead to the programs an organization develops and delivers. Conversely, an organization should not have any programs that cannot be clearly tied to strategies for accomplishing the mission.

Some strategic plans refer to "strategic initiatives" rather than "programs" in order to emphasize the connection between mission, strategy, and program design.

**The Association's current programs are not clearly defined in relationship to the mission or to a strategy or theory of change. Immediately below is a discussion of current programs. Section B, immediately below will discuss strategic questions and possible program configurations.**

##### A. Current Programs

The Association website states that the mission is fulfilled -

"by providing production and marketing information; connecting members through events and communications; supporting floriculture research; and encouraging the purchase and use of locally grown flowers by the public."

This strategic statement relates to the marketing part of the mission by identifying the strategies of providing marketing information to growers and encouraging the public to purchase locally grown flowers. Both these strategies imply programs and resources, however current programs do not track exactly. Marketing information is presumably part of the research and education programs and encouraging the purchase of locally grown flowers is accomplished through an online database of member offerings, but not supported by a robust marketing program and budget.

The part of the mission that requires the organizations to help growers produce high quality floral material is supported by the strategies of research, and "connecting members." Notably education is not identified as a strategy. The research strategy is supported by the programs of the Foundation. The "connecting members" strategy encompasses both the membership program and the various educational programs of the Association.

The Association's most recent 990 lists only two program areas:

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- 1) National conference and regional meetings
- 2) Sales of literature

The purpose of the first program is to “provide information regarding cut flower growing production and marketing techniques, provide opportunities to share with fellow growers and promote positive communications in the industry.”

The purpose of the second program is to “increase knowledge and interest regarding production and marketing techniques of cut flowers” and “disburse information to membership.”

In survey responses members talk about education, mentorship, and peer-to-peer learning as means for accomplishing their personal and professional goals. If the organization expressed its mission in terms of member success and satisfaction, then education, mentorship, and peer-to-peer learning would be the primary strategies for accomplishing the mission.

#### *Education*

Most education currently happens through publications and at conferences. Facebook has an increasing role in current education. The implied theory is that publications and conferences are the best strategies for fulfilling members’ educational needs and that on-line opportunities will continue to play a more important role. The results of the survey clearly indicated that members value a range of educational opportunities and want a variety of options for learning online and from each other online and over the telephone as well as in person.

The mentorship program developed in response to a desire to ensure the future of the industry at a time when there was not as much interest. The landscape has changed dramatically since the mentorship program began and now there is much more demand for mentorship than available mentors, and the member survey responses conveyed a desire for a more structured mentorship or beginning grower training program, as well as some concern about competition from newer farmers and potential resource allocation issues between beginning and established members.

#### *Research*

The research program is better defined than other program areas, perhaps in part because it is housed in a separate legal entity. The key strategic questions related to the research program relate to pricing information, partnerships, and integration with other programs. One of the members top needs for information is pricing and economic information. Acquiring this information is a research activity, but this is not clearly expressed in current written materials. Related, disseminating pricing and economic information, and providing the context and meaning for the information is an educational activity, so the research and educational functions will need to have an element of coordination in order for each to be effective.

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*Membership*

The membership program itself lacks a clearly expressed strategy. The membership program serves the purpose of connecting members and creating community while building a financial base for the organization allowing it to accomplish its mission of serving members. Responses to a survey question regarding membership fees pointed out that lowering membership fees would likely increase membership and revenues, but there was not a clear consensus that the Association should seek simply to grow membership. Rather, some suggest the Association should be for “serious” growers and not necessarily strive to be easily accessible to beginners and “hobbyists.” The planning committee felt strongly that the organization should not limit membership, and also pointed out that members’ concerns could be addressed through the design of educational events and the mentorship program. One of the stronger impressions the planning committee received from the survey was that membership outreach and communications need to be improved. The membership program relates to the existence and purpose of the organization. Most member benefits are delivered to members through the education and research programs, but one of the benefits of membership is access to a marketing program, but the marketing program is not well developed or strategically integrated with other programs.

**B. Strategic Questions and Possible Program Configurations**

The proposed mission statement discussed above begins by identifying research and education as core organizational strategies:

*Our mission is to support specialty cut flower growers **by creating accessible research and educational opportunities** for growers at every stage of developing financially sustainable businesses.*

The next part of the mission statement speaks to the essence of who we are as an Association, or our fundamental reason for existing.

***We build community through peer-to-peer learning and mentorship.***

The first part of the statement is the vision or the outcome - community - and the second part of the statement is the strategy for creating community by learning together.

The final part of the mission suggests limits on the boundaries of what the Association does:

*We share an interest in **ecological sustainability** and the pursuit of **personal and financial well-being and success.***

Many topics and educational activities fit within the boundaries of ecological sustainability and the pursuit of well-being and success, but activities which do not fit within these bounds are by

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definition either activities the Association should not engage in, or should only engage in after another round of strategic planning and board-level approval of a new mission.

This new mission statement states the three core strategies of the organizations: research, education, and membership, and implies three corresponding program areas. **These program areas are the focus of the most detailed part of strategic planning.** Each program needs to be defined in terms of desired outcomes and suggested strategies, and each program needs to be developed and managed in a way that allows us to measure success and continuously improve.

The following are potential strategy statements supporting and defining the organizations' program areas:

**Education Program:** Members value education in many forms including in-person events, publications and a variety of on-line opportunities. Membership includes both inexperienced newer growers who want to learn a variety of growing and business practices, and more experienced, seasoned growers who desire deeper dives into more complex topics. At the same time, the educational environment for all farmers is changing. Though the Farm Bill continues to fund various USDA programs to fund grower education, the USDA itself is in the middle of significant structural changes that will affect how programs are delivered. The most recent Farm Bill made permanent funding of approximately \$20 million a year for beginning farmer and rancher education, thus incentivizing many programs around the country to improve their educational programs and creating many potential partners and competitors for the Association. *In response the organization's primary strategy for education should be to refine current offerings, improve online offerings, and map a strategy for partnering with other organizations to take advantage of federal funding and provide more locally relevant and accessible opportunities to members.*

**Research Program:** There are limited public funds available for the type of research that most benefits our membership, therefore we should raise funds to support the type of research we need. Current programs include both on-farm and academic research. These programs have not been formally evaluated to determine what if any long-term impacts have resulted from the Foundation's investments.

As the cut flower industry continues to experience resurgent growth, we have new opportunities to partner with Land Grant institutions to leverage federal funds for larger research projects to benefit our membership.

*During the period of this strategic plan the Foundation should undertake a formal evaluation of research funded to date and explore opportunities for new partnerships.*

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*During the period of this strategic plan the Foundation should explore new opportunities to support economic research, particularly to find pricing information and economic benchmarks.*

**Membership Program:** Members value their membership for intangible reasons beyond the specific offerings of the membership program. According to survey responses much of the value of membership comes from print publications, and online forums and from participating in events that are open to non-members as well as to members. Though not discussed in the survey, the membership structure affects board structure and thus overall organizational governance, so in substantial ways the membership program is tied to board development and governance.

The planning committee recommends that the Association continue with a strategy of maximally inclusive membership, though the proposed wording of the new mission statement is also intended to signal that the organization intends to serve people who intend to grow for financial profit. or there is some strategic reason for limiting or discouraging membership.

With a strategy of maximum inclusiveness then the membership program needs to be reviewed to determine 1) if the fee structure accomplishes the goal of maximizing membership and revenue and 2) if all member benefits are important to members and if the costs of member benefits are covered by membership fees, or if not if they can or should be subsidized.

*The first strategic priority for the organization relative to membership should be to understand the relationship between members benefits and membership fees and to re-examine the marketing program in that context.*

#### **Components of the Membership Program**

**Member-Pricing for Educational Opportunities:** Members get preferred pricing on educational events. The educational program, including member-only educational opportunities is discussed above under education.

**Peer-to-Peer Online Forums:** Members have access to Facebook closed groups.

**Cut Flower Quarterly:** This full-color magazine is a membership benefit and sent to members every quarter. This membership survey indicated members place a high value on this benefit.

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**Marketing Information:** The membership survey showed that members place great value on pricing and marketing information. Getting this information should fall under the research program and disseminating it should fall under the education program.

**Marketing Tools:** The membership program includes access to an online marketing platform where members can identify their offerings and buyers can search for flowers and related services. In order to determine if this activity is strategic for the organization we need to evaluate how much the website is used, and how much value it returns to members, the extent to which it increases membership, and the cost of the service compared to the membership revenue it generates.

**Regionality:** The Association’s Board is elected through regions and regional board members have responsibilities for representing membership interests at the regional level. This may translate to regional events. The membership survey made it clear that the membership is not aware of how the regional system is supposed to work, and that the system is inconsistent across regions. Members also placed a high value on regional and local events, however some indicated that growing zone was more important than region, and others suggested the regional map should be re-drawn, and still others said that since the regions were so large there was not much difference in travel time and expense between going to a regional meeting or a national meeting.

*The issue of regionality needs to be explored in three ways:*

- 1) how it affects board structure and governance;*
- 2) how it relates to membership experience and satisfaction; and*
- 3) how it relates to the deployment of educational programs.*

## 5. Goals, Objectives, and Measures

Goals are typically developed for the organization as a whole and may cut across all program areas. Goals may also be developed for each program. Some cross-cutting goals are needed in order to ensure that all the programs of the organization are aligned with each other and pulling together to accomplish the organization’s mission.

Actions are the specific activities needed to accomplish the goal. Measures are how management knows if the actions are being taken and if they are having the desired effect.

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Goals are often defined as descriptions of circumstances or conditions to be achieved. They should be phrased not as actions but as outcomes. A goal is for flower-growers to be financially successful; a strategy for accomplishing this is to take the action of providing growers with an educational program.

Goals should be time-bound and measurable. Usually the measure of a goal is defined in terms of measurable an indicator, and then the goal is expressed as an absolute or percent change relative to the baseline value of the indicator.

The ultimate goal of an education program is expressed in how the information actually benefited the people who received it. This can be expressed in terms of numbers of people who adopted new practices as a result of the educational program, and the number of people who experienced a benefit to yields or profits as a result of adopting information received in the program. The problem with evaluating an education program in terms of the benefits realized by participants is that it is difficult and resource-intensive to determine how participants were actually benefited, and it can be impossible to isolate the effects of one educational program from the many other circumstances affecting the participant.

Research programs can be evaluated relative to outputs such as research results, and also relative to the effect of the research results.

A membership program can be evaluated in terms of absolute numbers, percent changed in numbers, and qualitative measures such as overall member satisfaction, or rates of participation in surveys, elections, meetings, etc.

For organizations that do not have good baseline measures work may be framed as strategic initiatives with intended outcomes, one of which is to develop an evaluation plan and identify indicators, establish baseline measures and then be prepared to state goals in terms of changes to baselines on the indicators. This is the approach the organizations should take at this time.

#### A. The time-frame for this strategic plan

The period of the strategic plan should be just three years. In that time the organizations should develop the programs in sufficient detail to include indicators and baselines for the indicators. At the end of the three-year period the organizations should be able to update the strategic plan to include specific, measurable, achievable, realistic, and time-bound (SMART) goals.

#### B. Strategic Initiatives

The four strategic initiatives for the three-year strategic plan should be as follows:

##### 1) Research Initiative

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- a) Develop the research program to integrate with the education program and meet members' needs for economic information as well as horticultural research.
  - b) Consider the roles of partners in funding and executing research work.
  - c) Develop a process for the research program sufficient to support the organization in developing SMART goals for future work.
- 2) Education Initiative**
- a) Continue to provide in-person learning opportunities.
  - b) Continue to offer on-line informal learning opportunities.
  - c) Develop the education program to include new synchronous and asynchronous learning opportunities and to support the mentorship program with formal learning opportunities.
  - d) Explore how to build a library of new and existing educational materials and how market and price access to the library.
  - e) Consider the roles of partners in funding and executing educational work.
  - f) Develop a process for evaluating the education program sufficient to support the organization in developing SMART goals for future work.
- 3) Membership Initiative**
- a) Evaluate membership fees and benefits and adjust as indicated.
  - b) Develop a written outreach plan for membership communications.
  - c) Evaluate the regional structure of membership and board governance and adjust as indicated.
  - d) Develop a process for evaluating the membership program sufficient to support the organization in developing SMART goals for future work.
  - e) Consider efforts to increase membership diversity.
- 4) Capacity-Building Initiative**
- a) Update board processes and procedures including board governance, structure and training. This should be done in concert with the examination of the membership program and regionality.
  - b) Update accounting processes and procedures to clearly express programs and to be able to accommodate grant and contract funders.
  - c) Update human resources management capacity to support staff growth.

## III. Moving Forward

### A. Using the Balanced Scorecard Approach to Adopt and Implement a Strategic Plan

The balanced scorecard approach is a method for evaluating strategic decisions by balancing four equally important overarching needs:

- ❖ Financial sustainability: How will the planned activities affect financial sustainability?
- ❖ Member services: How will the planned activities serve members?

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- ❖ Internal capacity: What internal processes need to be developed or improved in order to implement the plan?
- ❖ Mission sustainability: How will the planned activities serve the organization's mission in the long run?

The planning committee recommends the board use the balanced scorecard approach to review, revise and approve the timeline for this strategic plan and the four initiatives to be undertaken during the three-year period of this strategic plan.

#### B. An Implementation Plan

The implementation plan for this strategic plan will be developed and delivered as a separate document containing action items and timelines.

#### C. Board Approval and Management of the Strategic Plan

The board should review and discuss this document and the companion Summary Strategic Plan, and work with the SPSC to edit as appropriate. At the November Board meeting the Board will be asked to approve the summary strategic plan with the final version of this document as supplemental supporting information. The board will also be able to review and discuss a draft implementation plan at the November board meeting, but the strategic plan (what the organizations will do) should be separately approved and managed than the implementation plan (how staff will execute against the direction given by the board through the strategic plan.)

Once the strategic plan is approved, board and staff will be responsible for ensuring that the organization's operations are aligned with the direction given in the strategic plan. By the end of the term of this strategic plan the board should ensure that a new strategic plan is in place. That plan should include SMART goals and should cover a five-year period.